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Patterns of change in services business and in management studies

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2016

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Eccoci al numero 100 di Sinergie

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Aphorisms

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1. *“The journey of a thousand miles begins with a single step”*
(Lao Tzu)
2. *“I don't have any solution, but I certainly admire the problem”*
(Ashleigh Brilliant)
3. *“People may doubt what you say, but they will believe what you do”*
(Lewis Cass)
4. *“The mystery of human existence lies not in just staying alive, but in finding something to live for”*
(Fyodor Dostoyevsky)
5. *“There is no favorable wind for the sailor who doesn't know where to go”*
(Seneca)

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Eccoci al numero 100 di Sinergie

Claudio Baccarani
Gaetano M. Golinelli
Eccoci al numero 100 di
Sinergie

Marzo 1983: dopo lunghe discussioni sul senso, la linea, il titolo di una rivista che accreditasse i lavori del Consorzio Universitario di Economia Industriale e Manageriale (CUEIM), nasce Sinergie.

Agosto 2016: esce il numero 100 della rivista.

Trentatré anni di attività, un periodo che proietta la rivista negli orizzonti della longevità tra i journal che si occupano di management e governo delle organizzazioni siano esse private o pubbliche.

È un traguardo che è arrivato quasi inaspettato, protési in quella continua azione redazionale che con il lavoro di tanti ci ha condotto, quasi increduli, sin qui.

Impensabile proporre in breve una lettura della varietà di passaggi che hanno contraddistinto il divenire della rivista, quasi occorrerebbe un progetto di ricerca per farlo.

975 autori, 146 referee, 48.031 visite al sito nell'ultimo anno, oltre 16.000 paper scaricati dal 2013. Questi solo alcuni numeri della rivista che potremmo dire ci è cresciuta sotto gli occhi con il lavoro spesso silenzioso di coloro che hanno creduto nella sua proposta editoriale.

E allora cosa dire in apertura di questo n. 100? A lungo abbiamo pensato a questo perché si tratta di scelta difficile in quanto connessa anche ad aspetti di tipo emozionale ed affettivo che vanno ben al di là del lavoro e dell'oggettività dei fatti.

Ma poi, convinti che "spesso il futuro stia alle nostre spalle", se vi si presta la necessaria attenzione in una prospettiva rivolta all'avvenire, abbiamo immaginato un ritorno alle origini.

Così, anche ritenendo che tanti Lettori, soprattutto i più giovani, non abbiano avuto la ventura di leggere l'Editoriale del numero "zero" del Fondatore della rivista Giovanni Panati, abbiamo pensato di riprenderlo in alcune sue parti, ad iniziare da quella relativa alla scelta del titolo.

".....Sinergia è termine di origine greca (syn, insieme ed ergon, lavoro), introvabile nel classico dizionario della lingua italiana dei Tommaseo. È entrato di recente nel linguaggio moderno, soprattutto ad opera della scienza medica, dove lo si usa per indicare l'effetto provocato sull'organismo dall'attività simultanea di vari organi o funzioni, oppure per indicare l'effetto esaltante delle proprietà e dell'attività di un farmaco quando venga somministrato congiuntamente ad un altro di proprietà analoghe o complementari. Ma anche in economia lo si usa ormai correntemente per indicare un'azione combinata capace di produrre (generalmente, ma non necessariamente) un risultato maggiore della mera sommatoria delle singole forze o componenti costituenti lazione stessa. In breve, esso indica un'esaltazione delle caratteristiche positive (o negative, se il segno risultante fosse tale) di azioni, forze o componenti operanti insieme.

Chiamando Sinergie questa rivista abbiamo voluto perciò sottolineare la speranza e l'augurio che il concorso simultaneo di persone appartenenti a discipline diverse, con orientamenti e capacità differenti (caso assai frequente

nella maggior parte delle ricerche tecnoeconomiche), abbia a sortire un effetto superiore ai “valore” dei singoli contributi.

Pascoli ed Einaudi (ma prima di loro Montaigne e Pascal) direbbero che il miele è un risultato sinergico del “lavoro” delle api e dei fiori. L'immagine può essere fuorviante e non conviene insistere....”

E dal titolo breve è il passaggio al senso del progetto originale della rivista.

“... Progettare e realizzare una nuova rivista (che, per quanto modesta, costringe ad un'attività pubblica) è fatica grande, per sobbarcarsi la quale occorre non poco entusiasmo ed ottimismo, se è vero che l'ottimismo è una capacità personale di investire le proprie energie e i propri interessi. L'intensità di ottimismo necessaria dipende in realtà dal giudizio sull'ambiente socio-culturale: ne occorre una dose eroica se ci sentiamo circondati dalla crisi dei valori e della ragione, se ci vediamo sommersi dall'imbarbarimento, dal deterioramento e dal non-senso. Ne basta invece una dose assai minore (ma non trascurabile) se nella nostra rappresentazione della società prevale la fiducia nell' “homo faber” e nella sua potenziale creatività pacificatrice. Lasciamo perciò al lettore di valutare il nostro sforzo.

Non bastano però entusiasmo e ottimismo. Occorre anche un minimo di volontà collaborativa e di convincimenti comuni: occorre quanto meno un comune denominatore di fiducia verso il contributo essenziale della conoscenza al processo di scoperta delle verità (scientifiche) attraverso le quali l'uomo può crescere nelle libertà.

Già nell'iter di preparazione della rivista ci è stato chiesto a quale scopo accrescere conoscenza e verità. La risposta può sembrare ingenua, ma imprescindibile: esso sta nel presupposto implicito che una maggior dose di conoscenzaverità (unita alla necessaria consapevolezza etico-sociale) consenta di migliorare nel tempo la qualità della vita.

Ma gli interrogativi rimbalzano: chi decide prevalentemente la qualità della vita del mondo in cui viviamo, cioè del mondo industrializzato? Il complesso gioco dei rapporti internazionali - che ritagliano spazi e gradi di libertà - o l'intreccio invisibile di tutti i micro e macro-interessi di uomini e gruppi, o la grande impresa, come si rispondeva in passato?

Qualunque sia la risposta ci sembra che, in ogni caso, una maggior conoscenza scientifica dei processi che conducono alle scelte economiche, tecnologiche, produttive, sociali dovrebbe offrire la possibilità di un maggior controllo sociale, la cui intensità e modalità di attuazione dipende dall'etica della volontà.

Questa è la minima Weltanschauung che dà significato e guida all'iniziativa del nuovo periodico....”

Ed ecco dal senso l'affacciarsi degli obiettivi originari del periodico.

“... Se obiettivo prossimo della rivista è di dare una voce al Consorzio universitario di ricerca - e a quanti vi collaborano - verso i suoi associati e verso l'esterno, non meno degni di considerazione sono gli obiettivi remoti: si è voluto creare una potenzialità agglomerativa, un punto d'incontro e di

dibattito, una palestra aperta a giovani studiosi, ricercatori e intellettuali d'impresa, con i quali il rapporto può apparentemente risolversi in un momento di "costrizione" alla riflessione (scrivere è sempre più "costrittivo" che parlare, e perciò più fecondo, perché si è appunto costretti a chiarire a se stessi le idee che si vogliono comunicare)...."

Claudio Baccarani
Gaetano M. Golinelli
Eccoci al numero 100 di
Sinergie

E trentatré anni dopo e cento fascicoli dopo eccoci qui. Siamo giunti al numero 100 con tanti cambiamenti che hanno portato la rivista a rappresentare in qualche modo la storia degli studiosi di Economia e gestione delle imprese, anche attraverso il Convegno Annuale ora alla sua ventinovesima edizione curata in collaborazione con Sima.

Quale sia la qualità del risultato cui siamo pervenuti non tocca certo noi dire. Tocca, invece, a noi ringraziare di cuore e ad alta voce tutti i nostri Lettori che hanno percorso le pagine della rivista rendendola vitale, gli Autori - professori, giovani ricercatori e dottorandi - che con il loro contributo di riflessione hanno creato l'interesse intorno al periodico, i Referee che hanno assicurato il valore delle proposte, i Colleghi del Comitato Scientifico e gli Associate Editors che hanno contribuito a definirne la direzione, i Colleghi di tutte le Università per la loro partecipazione alle diverse iniziative create intorno alla rivista, il CUEIM che con il suo sostegno ha reso possibile la pubblicazione della rivista e la Redazione tutta senza la quale questa lunga strada non sarebbe certo stata percorsa.

Insieme siamo riusciti ad arrivare sin qui, insieme sapremo camminare in sintonia di pensiero e azioni verso ulteriori e sempre più sfidanti traguardi consapevoli che l'"unica costante oggi è il cambiamento" (Giovanni Panati).

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Papers from 18th Toulon-Verona Conference

Scholarly management journals: are they relevant for practitioners? Results of a pilot study¹

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Chiara Rossato - Paola Castellani - Claudio Baccarani
Angelo Bonfanti

Abstract

Purpose of the paper: This paper aims to verify how interesting and useful practitioners find academic management research by asking entrepreneurs and managers what they think of some articles published in leading journals that have been selected on the basis of precise criteria as representative of management research.

Methodology: This pilot investigation was conducted in April and May 2015. In accordance with the study design, a convenience sample of 43 entrepreneurs and managers were sent four articles published in leading management journals in 2014 by e-mail, accompanied by a simple questionnaire consisting of closed-answer questions. Although they strictly lacked statistical validity, the 23 completed questionnaires that were returned not only provide the first feedback concerning the subject of the study, but also offer some fundamental indications concerning the approach of the project as a whole that will help to refine the orientation of its next phase.

Findings: An analysis of the literature shows that the very concept of relevance is difficult to measure, as its defining traits are characterised by a certain level of ambiguity and the meaning that is attributable to them is rather complex. This paper highlights how management research should focus on subjects that are of real interest to practitioners, satisfy the need for rigour required by positive sciences, and be capable of producing knowledge that has a strong impact on professional communities.

Practical implications: The ongoing debate cannot remain confined to academic circles, but needs to involve practitioners with whom to establish a synergistic dialogue. They should ask management researchers to study problems that are relevant and interesting to them, and observe the more complex and dynamic situations that firms have to face.

Originality and value: In literature the importance of clarifying whether and in what ways the results of university scientific research are used in practice has emerged. This paper proposes and tests a rigorously systematic framework in order to enable us to investigate the way in which managers perceive management research with the aim of increasing the relevance of academic research strategies and the editorial policies of management journals.

Key words: management research; relevance; academic journals; practitioners; university

¹ Best paper for the 18th Toulon-Verona Conference "Excellence in Services", Palermo (Italy), 31 August - 1 September 2015.

1. Introduction

The relevance of management research is a highly topical and very important subject. It is topical insofar as the debate that has always characterised this area of research (Gummesson, 2001; Starkey *et al.*, 2001; Bartunek *et al.*, 2006; Pfeffer, 2009; Lorsch, 2009) has recently become even more intense (Chia, 2014; Hernes, 2014; Kieser *et al.*, 2015) and various journals have underlined the need to ensure that scientific research has a greater practical impact (Dahl *et al.*, 2014; Gupta *et al.*, 2014; Brexendorf *et al.*, 2015). Furthermore, since the recent internationalisation of Italian academic management research, it has also become a more burning issue in Italy, as can be seen from two issues of the journal *Sinergie* (No. 86 of 2011 and No. 87 of 2012) and the debate hosted in the “Management Notes” section of the website of the Italian Management Society (SIMA). It is important because different attitudes towards relevance (or more precisely towards the relationship between relevance and rigour) profoundly change the nature and identity of management as a subject of research: if emphasis is placed on respecting scientific requirements and criteria, it is inevitable that research becomes more abstract and management is transformed into a discipline that seeks to identify precise cause-and-effect or law-like relationships between company behaviours and the subject of study; if more weight is given to being able to apply research results, management is seen as a discipline that seeks to produce the type of knowledge that can be used to improve entrepreneurial behaviour and performance.

The debate not only involves supporters of both these positions but, as often happens, there are also those who seek to reconcile them by proposing a third way that falls at an intermediate point in the rigour-relevance continuum (Verona, 2010). Nevertheless, despite the considerable efforts of authors to demonstrate the superiority of their respective positions, the number and variety of the approaches seem to make it unlikely that a definite unitary view will be reached (Kieser *et al.*, 2009; Hodgkinson *et al.*, 2009).

In an attempt to overcome the dichotomous logic inherent to opposing theses, it has also very recently been suggested that it is time to abandon dialectics in favour of a rigorously systematic study of relevance by investigating how the results of scientific research are actually used in practice (Kieser *et al.*, 2015). In line with this, we have initiated a project aimed at verifying how interesting and useful practitioners find academic management research by simply asking entrepreneurs and managers what they think of some articles published in leading journals that have been selected on the basis of precise criteria as representative of management research. The underlying premise is that the production of knowledge in the field of management can no longer avoid considering the practical implications of research because if we were to think that research and action in the field are distinct environments guided by different systems of logic that cannot even theoretically have any points of contact, there would be no sense in a project such as ours.

On the basis of this premise, the aim of the project is to involve practitioners in order to acquire an inevitably incomplete but at least

indicative understanding of how interesting, useful and usable they consider the findings of scientific management research. Any such project is necessarily long and articulated, and so the project was divided into three phases: the design of the study, which was described in a paper presented at the 2015 international Euromed Conference (Brunetti *et al.* 2015); a pilot investigation; and the final extended survey of the selected sample, which will be carried out in the forthcoming months.

The aim of this paper is to describe the results of the pilot survey, which was conducted in April and May 2015. In accordance with the study design, a convenience sample of 43 entrepreneurs and managers were sent four articles from leading management journals in 2014 by e-mail, accompanied by a simple questionnaire consisting of closed-answer questions. Although lacking strictly statistical validity, the 23 completed questionnaires that were returned not only provide the first feedback concerning the subject of the study, but also offer some fundamental indications concerning the approach of the project as a whole that will help to refine the orientation of its next phase.

The paper will consist of a review of the literature on the subject, followed by a description of the method and the sample selection criteria and the results of the survey; the final section will discuss the results and limitations of the study, and prospects for future research.

2. Literature review

The controversy between practical relevance and the need for scientific rigour in management studies is not an innovative subject of research (for a brief history, see Gulati, 2007), as the first significant contributions date back to the beginning of the 1970s (Hilgert, 1972; Choudhury, 1986; Shrivastava 1987). However, it remains as prominent as ever (Hodgkinson *et al.*, 2009; Kieser *et al.*, 2009; Baccarani *et al.*, 2011; Brunetti, 2011; Donaldson *et al.* 2013; Hernes, 2014; Bartunek *et al.* 2014; Kieser *et al.* 2015) and has involved scholars working in various areas, including strategy (McGahan, 2007), marketing (Ankers *et al.*, 2002; Varadarajan, 2003), supply chain management (Flynn, 2008; Kaufmann *et al.*, 2011; Thomas *et al.*, 2011; De Beuckelaer *et al.*, 2012), and general management (Starkey *et al.*, 2001; Booker *et al.*, 2008).

Some authors (e.g. Wolf *et al.*, 2012) believe that the rigour-relevance problem arises because the emphasis that management studies place on scientific rigour is detrimental to the practical usefulness of the results (e.g., Starkey *et al.*, 2001), their usability (e.g., Serenko *et al.* 2011; Benbasat *et al.*, 1999; Marcus *et al.*, 1995), and their capacity to stimulate innovation.

In a detailed analysis of the literature, Kieser, Nicolai and Seidl (Kieser *et al.*, 2015) mapped the many published contributions on the basis of their prevalent approach to the rigour/relevance question and found that they fell into two macro-categories: “programmatically literature”, which takes the lack of practical relevance of management studies as its main point of departure, tries to identify the causes of the “relevance problem”, and suggests different solutions; and “descriptive literature”, which includes theoretical and

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empirical works that examine how management practice deals with the output of management research.

Programmatic literature finds that the main causes of the lack of practical relevance are:

- *The inaccessibility of research studies and academic jargon*
The language of the studies needs to be simplified and they should more effectively highlight the managerial implications of their results (Steffens *et al.* 2014; Bansal *et al.* 2012; Serenko *et al.* 2011; Kelemen *et al.*, 2002).
- *Research methods and techniques are too sophisticated and not very useful for solving practical problems*, and so an action research approach should be adopted in order to dissolve the difference between science and practice (Coghlan, 2011; Lüscher *et al.* 2008).
- *Knowledge is mainly produced and evaluated within the academic world* (Huff, 2000), whereas it should be mainly developed in the context of application and be aimed directly at the needs of practitioners (Nowotny *et al.*, 2001). Related solutions are devised to develop collaborative research between academics, practitioners and institutions (Van de Ven *et al.* 2006; Van de Ven, 2011) and make changes in the process of quality control such as introducing practitioners as peer reviewers.

The descriptive literature published by a large number of scholars proposes describing or assessing the interactions between management research and external stakeholders and, on the basis of the findings of Kieser *et al.* (2015), may be divided into the following main streams of research:

- *The different meanings and forms associated with “practical relevance”*.
Augier *et al.* (2007) pointed out that relevance is ambiguously defined, not precisely measurable, and complex in meaning.
Nicolai *et al.* (2010) developed a classification of different sub-types of relevance: i) instrumental relevance, which can guide the decision-making process by means of models; ii) conceptual relevance, which offers a description of the causal relationships between, and the effects of, the analysed variables; and iii) symbolic or legitimative relevance.
- *Academic results rarely disseminate into practitioner discourse*.
This is because scholarly journals (particularly bridging journals) are seldom read by practitioners (Rynes *et al.*, 2002), and the way in which research results are described in practitioner-oriented journals is considerably different from that in which they are described in scholarly discourse (Kelemen *et al.*, 2002).
- *The use of research output is not a simple transfer, but a complex organisational process* (Nicolai *et al.*, 2010).
Academic knowledge may be used in different ways: partially or completely, rhetorically or substantively. Moreover, its utilisation is associated with reinterpretations of the meanings of the concepts involved (Seidl, 2007).
- *Management science and practice follow different forms of logic in their operation*.

In particular, the purpose of the scientific domain is not to describe the subject of the study, but rather to develop abstract and general theories

that allow meaning to be assigned to empirical observation, whereas managerial language is intended to facilitate practical action (Astley *et al.*, 1992); for this reason, it is necessary to build a bridge to connect management academy and management practice.

It is clear from the theoretical proposals described above that there has long been considerable interest in the question of relevance and the contrast between relevance and rigour, which has been looked at from many points of view. It therefore seems to be useful to investigate the underlying reasons by means of methodologically rigorous (and therefore significant) empirical studies capable of obtaining results that support such conceptual conclusions.

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3. Methodology

As mentioned in the introduction, this study of the Italian business community's perception of international scientific management research was divided into three phases: 1) the design of the research framework; 2) a pilot investigation; and 3) the extended survey.

The research framework (phase 1): A previous paper (Brunetti *et al.*, 2015) explained the selection of the journals, the criteria used to identify the articles, the logic underlying the selection of the practitioners to be interviewed, and the plan for administering the articles and the questionnaire in detail. These are summarised in Table 1.

Tab. 1: The research framework

Selection of Journals	J1. Academy of Management Journal J2. Journal of Management J3. Business Horizons J4. Journal of Business Research J5. Journal of Management Inquiry J6. Journal of Management Studies J7. Management Science J8. Omega - International Journal of Management														
Selection of Articles	<ul style="list-style-type: none"> • year 2014 • 8 articles (one per journal) • 2 most cited (journals with the highest impact factor) • 6 chosen on the basis that they were the third article in the third issue 														
Selection of Study Sample	<ul style="list-style-type: none"> • 300 practitioners • owners/managers • north-east Italy • national databases (CCIAA, Federmanager, ALVEC, ...) 														
E-Mail Contacts	<ul style="list-style-type: none"> • E-mail for each interviewee • 4 articles (full text) for each interviewee: two were the same for all participants (most cited) + two were selected on a rotation basis 														
Questionnaire (on-line platform)	<table style="width: 100%; border: none;"> <tr> <td style="border: none;">• Know journal?</td> <td style="border: none; text-align: right;">yes / no</td> </tr> <tr> <td style="border: none;">• Article/subject interesting?</td> <td style="border: none; text-align: right;">Likert scale</td> </tr> <tr> <td style="border: none;">• Article comprehensible?</td> <td style="border: none; text-align: right;">Likert scale</td> </tr> <tr> <td style="border: none;">• Article/research useful (even only potentially)?</td> <td style="border: none; text-align: right;">Likert scale</td> </tr> <tr> <td style="border: none;">• Article/research usable or might have an impact on business management?</td> <td style="border: none; text-align: right;">Likert scale</td> </tr> <tr> <td style="border: none;">• Read other national/international management journals?</td> <td style="border: none; text-align: right;">yes / no</td> </tr> <tr> <td style="border: none;">• Would subscribe to this journal?</td> <td style="border: none; text-align: right;">yes / no</td> </tr> </table>	• Know journal?	yes / no	• Article/subject interesting?	Likert scale	• Article comprehensible?	Likert scale	• Article/research useful (even only potentially)?	Likert scale	• Article/research usable or might have an impact on business management?	Likert scale	• Read other national/international management journals?	yes / no	• Would subscribe to this journal?	yes / no
• Know journal?	yes / no														
• Article/subject interesting?	Likert scale														
• Article comprehensible?	Likert scale														
• Article/research useful (even only potentially)?	Likert scale														
• Article/research usable or might have an impact on business management?	Likert scale														
• Read other national/international management journals?	yes / no														
• Would subscribe to this journal?	yes / no														
Administration, Collection and Processing of Results	Second Step of the Research														

Source: our elaboration

The research protocol foresees a survey of a representative sample of 300 Italian entrepreneurs and managers by means of a questionnaire accompanied by the full texts of the four articles extracted from the selected journals that each respondent will be asked to read and evaluate (phase 3, the extended survey).

However, before conducting the final field research itself, it was decided to introduce an intermediate pilot survey (phase 2) in order to test the questionnaire on a smaller sample, with the aim of obtaining some preliminary results and some suggestions for improving the subsequent phase in terms of the logical construction of the questionnaire, the number and type of articles, the selection of the practitioner sample, and the means of administering the articles and collecting the completed questionnaires.

The subject of this paper is the pilot study, which was substantially a preliminary survey using the same journals as those that will form the object of the subsequent, more extensive analysis but involving a much smaller sample of interviewees.

What follows is a description of its main methodological components: a) the assessed articles; b) the “restricted” sample of interviewees; c) data collection and the questionnaire; and d) statistical analysis.

3.1 The assessed articles

In accordance with the framework shown in Table 1, the eight articles came from the eight international scientific journals that were selected in the first phase of the study (Brunetti *et al.*, 2015) on the basis of their generalist nature (in terms of content and geography), their declared orientation towards practitioners (in addition to being theoretical), and the fact that they had undergone a double-blind peer review process and been attributed with an impact factor.

Table 2 shows the publisher and affiliation (if appropriate), the year of foundation, and the annual number of issues of the eight journals.

Once again in accordance with the framework, the “most cited article” was selected from the two journals with the highest impact factor (J1 and J2): in the case of the other six journals, the selected article was the third in the index of the third issue of 2014 (Table 3).

As a result, there was a difference of about 20 years between the articles in the first group and those in the second as articles A1 and A2 (the articles declared to be the most cited on the websites of their respective journals) were originally published in 1995 and 1991.

Tab. 2: Selected journals

	Journal title (Aims and Scope)	2013 5-Year IF	Publisher (Affiliation)	Year of foundation	Issues per year
J1	<i>Academy of Management Journal</i> "All articles published in the AMJ must also be relevant to practice. The best submissions are those that identify both a compelling management issue and a strong theoretical framework for addressing it. We realize that practical relevance may be rather indirect in some cases; however, authors should be as specific as possible about potential implications"	8.443	Academy of Management	1958	6
J2	<i>Journal of Management</i> "JOM, peer-reviewed and published bi-monthly, is committed to publishing scholarly empirical and theoretical research articles that have a high impact on the management field as a whole. JOM encourages new ideas or new perspectives on existing research"	8.027	Sage - Southern Management Association	1975	7
J3	<i>Business Horizons</i> "The editorial aim is to publish original articles of interest to business academicians and practitioners. (...) Ideally, articles will prompt readers to think about business practice in new and innovative ways. BH fills a unique niche among business publications of its type by publishing articles that strike a balance between the practical and the academic. To this end, articles published in BH are grounded in scholarship, yet are presented in a readable, non-technical format such that the content is accessible to a wide business audience"	1.962	Elsevier - Kelley School of Business, Indiana University	1957	6
J4	<i>Journal of Business Research</i> "The JBR applies theory developed from business research to actual business situations. (...) Published for executives, researchers and scholars alike, the Journal aids the application of empirical research to practical situations and theoretical findings to the reality of the business world"	2.341	Elsevier	1973	12
J5	<i>Journal of Management Inquiry</i> "JMI, peer-reviewed and published quarterly, is a leading journal for scholars and professionals in management, organizational behavior, strategy, and human resources. JMI explores ideas and builds knowledge in management theory and practice, with a focus on creative, nontraditional research, as well as, key controversies in the field"	1.775	Sage - Western Academy of Management	1992	4
J6	<i>Journal of Management Studies</i> "JMS publishes innovative empirical and conceptual articles which advance knowledge of management and organisation broadly defined, in such fields as organization theory, organizational behaviour, human resource management, strategy, international business, entrepreneurship, innovation and critical management studies. JMS has an inclusive ethos and is open to a wide range of methodological approaches and philosophical underpinnings"	5.196	Wiley	1964	8
J7	<i>Management Science</i> "MS is a scholarly journal that disseminates scientific research focusing on the problems, interests, and concerns of managers. (...) Its audience includes academics at business and engineering schools and managers open to the application of quantitative methods in business"	3.458	Informs	1954	12
J8	<i>Omega - International Journal of Management</i> "Omega reports on developments in management, including the latest research results and applications. (...) Omega is both stimulating reading and an important source for practising managers, specialists in management services, operational research workers and management scientists, management consultants, academics, students and research personnel throughout the world. The material published is of high quality and relevance, written in a manner which makes it accessible to all of this wide-ranging readership. Preference will be given to papers with implications to the practice of management. Submissions of purely theoretical papers are discouraged"	3.626	Elsevier	1973	8

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Source: our elaboration

Tab. 3: List of articles

Most cited	<p>A1. Huselid, M.A. (1995), "The Impact of Human Resource Management Practices on Turnover, Productivity, and Corporate Financial Performance", <i>Academy of Management Journal</i>, vol. 38, n. 3, pp. 635-672.</p> <p>A2. Barney, J. (1991), "Firm Resources and Sustained Competitive Advantage", <i>Journal of Management</i>, vol. 17, n. 1, pp. 99-120.</p>
Casual selection	<p>A3. Evaristo, R. and Zaheer, S. (2014), "Making the Most of your Firm's Capabilities", <i>Business Horizons</i>, vol. 57, n. 3, pp. 329-335.</p> <p>A4. Jamal, A. and Shukor, S.A. (2014), "Antecedents and Outcomes of Interpersonal Influences and the Role of Acculturation: The Case of Young British-Muslims", <i>Journal of Business Research</i>, vol. 67, n. 3, pp. 237-245.</p> <p>A5. Hudson, B.A. and Okhuysen, G.A. (2014), "Taboo Topics Structural Barriers to the Study of Organizational Stigma", <i>Journal of Management Inquiry</i>, vol. 23, n. 3, pp. 242-253.</p> <p>A6. Collet, F. and Philippe, D. (2014), "From Hot Cakes to Cold Feet: A Contingent Perspective on the Relationship between Market Uncertainty and Status Homophily in the Formation of Alliances", <i>Journal of Management Studies</i>, vol. 51, n. 3, pp. 406-432.</p> <p>A7. Lim, N. and Ham, S.H. (2013), "Relationship Organization and Price Delegation: An Experimental Study", <i>Management Science</i>, vol. 60, n. 3, pp. 586-605.</p> <p>A8. Schulz, T. and Voigt, G. (2014), "A Flexibly Structured Lot Sizing Heuristic for a Static Remanufacturing System", <i>Omega</i>, vol. 44, pp. 21-31.</p>

Source: our elaboration

However, given the time and effort necessary to read the articles (and in order to increase the likelihood of receiving a response), each interviewee received only four of the eight articles. All 43 received the two "most cited" articles; the others were distributed in rotation in such a way that all of the interviewees received at least one subset of common articles (albeit limited to two) and that each article had a minimum number of readers (between 13 and 15). Table 4 shows the distribution of the articles, and the number responses received for each.

Tab. 4: Article distribution

Article	N. of recipients	N. of respondents
A1	43	23
A2	43	23
A3	13	5
A4	15	9
A5	14	11
A6	14	6
A7	15	7
A8	15	6

Source: our elaboration

3.2 The “restricted” sample of interviewees

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The population considered in this research project ideally consists of all members of the Italian business community, particularly those in the higher echelons of company hierarchies (i.e. entrepreneurs and managers). Although the pilot survey involved a non-probabilistic sample of subjects directly known to the research team, we believe that it was representative of the population that will be the subject of the extended survey insofar as it consisted of both entrepreneurs and managers coming from various types of enterprise. Of the 43 people contacted, 23 agreed to take part in the study: a response rate of 53.49% .

Table 5 shows the distribution of the respondents by gender, age, education, job title, the size of their firms, and their attitude towards reading management journals.

Tab. 5: Summary statistics of the respondents in relation to the pilot survey

	Proportions (percentages)	Numerical coding
Gender	86.96% → Male 13.04% → Female	0 → Male 1 → Female
Age	4.35% → ≤ 30 years 34.78% → 31-40 years 26.09% → 41-50 years 30.43% → 51-60 years 4.35% → ≥ 61 years	0 → ≤ 30 years 1 → 31-40 years 2 → 41-50 years 3 → 51-60 years 4 → ≥ 61 years
Education	4.35% → High school 86.96% → University 8.69% → Other	1 → High school 2 → University 3 → Other
Position	26.09% → Entrepreneur 17.39% → Top/General Management 56.52% → Line/Function Manager	1 → Entrepreneur 2 → Top/General Management 3 → Line/Function Manager
Size of firm (€)	30.43% → < 5,000,000 4.35% → 5,000,000 – 15,000,000 0.00% → 16,000,000 – 30,000,000 4.35% → 31,000,000 – 50,000,000 13.04% → 51,000,000 – 100,000,000 47.83% → ≥ 101,000,000	1 → < 5,000,000 2 → 5,000,000 – 15,000,000 3 → 16,000,000 – 30,000,000 4 → 31,000,000 – 50,000,000 5 → 51,000,000 – 100,000,000 6 → ≥ 101,000,000
Readers of national/ international management journals	60.87% → Yes 39.13% → No	0 → Yes 1 → No

Source: our elaboration

3.3 Data collection and the questionnaire

The interviewees’ assessments were collected in April and May 2015.

The practitioners were contacted personally by means of an e-mail that briefly described the objectives and contents of the study as well as the methods of subject involvement and collaboration, and asked to:

- provide some personal information (gender, age, educational qualifications, position, the size of their company, and whether they were readers of management journals);
- read the four articles attached to the e-mail;
- answer a very brief questionnaire (six closed-answer questions), as shown in Table 6.

Tab. 6: Pilot survey questions

Q1 Do you know the journal in which the article was published?	yes = 0/ no = 1
Q2 Is the article/subject interesting?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Q3 Is the article comprehensible?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Q4 Is the article/research useful (even only potentially)?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Q5 Is the article/research usable or might it have an impact on company management?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Q6 Would you subscribe to this journal?	yes = 0/ no = 1

Source: our elaboration

Questions Q1 and Q6 refer to the journal in which the paper was published and are designed to evaluate its *popularity* and *attractiveness* by means of yes/no answers. The other four questions (Q2-Q5) evaluate the paper itself in terms of *interest* (Q2), *comprehensibility* (Q3), *usefulness* (Q4) and *usability* (Q5) using 5-point Likert scales (1 = lowest; 5 = highest).

3.4 Statistical analysis

Although, like in most pilot studies, the survey involved a small and non-probabilistic sample of subjects, the size of which often prevented any statistically significant conclusions (particularly in relation to articles A3-A8), the collected data were analysed using some standard statistical procedures in an attempt to extract some preliminary indications, particularly in relation to articles A1 and A2, which were distributed to all of the respondents.

Subsequently, they were analysed in order to obtain estimates and confidence intervals of the proportion of subjects whose answers indicated that they were favourable or otherwise towards the eight articles, and it was also possible to verify some hypotheses mainly relating to comparisons. Finally, the correlations between the responses, and between these and the demographic and personal covariates, were calculated, and various regression analyses were implemented to investigate their dependent relationships.

4. Data analysis and results

In line with the methodology described above, the statistical analyses of the collected data will be described as follows: 1) proportions and mean values; 2) confidence intervals of the means; 3) comparisons of groups of articles; and 4) correlations and regression analyses.

4.1 Proportions and mean values

An analysis was made of the means of the valuations of all of the subjects of each article and each indicator (Q2-Q5) and the *proportion* (percentage) of subjects giving a negative answer to Q1 and Q6 concerning the journal publishing the paper.

In this way, it was possible to obtain some indications related to each article (A1-A8) concerning: 1) the *popularity* and *attractiveness* of the journal in which the paper appeared; 2) the degree of *interest* in the paper (or more generally in its subject); 3) the degree of *comprehensibility* of the paper; 4) the degree of *usefulness* of the paper; and 5) the degree of *usability* of the paper (see Table 7).

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In substance, and distinguishing the judgements of the journals and the papers, it emerged that there was little of appreciation of the former, which not only seem to be *little known* to managers and entrepreneurs, but also apparently uninteresting. After having read the article, the interviewees declared that they were not interested in subscribing to the journal, which was therefore considered largely *unattractive*, albeit only on the basis of the single article.

The articles gave rise to a greater variety of judgements: for example, only half of the articles (A1, A2, A3 and A7) were considered interesting (in themselves or in terms of their subject) and, on the basis of the confidence intervals shown in Figure 1, this was statistically significant only in the case of the first two.

The average degree of *comprehensibility* seemed to be greater although this was statistically confirmed only in the case of A2 (Fig. 1): only articles A6, A7 and A8 seem to be insufficiently understandable.

Finally, the judgements concerning the degree of *usefulness* and *usability* of most of the articles (similar in terms of meaning and average scores) were more negative: only articles A1, A2 and A3 were judged positively in both cases.

In brief (and bearing the limitations arising from the small number of respondents in mind), this analysis shows that entrepreneurs and managers do not know the international scientific management journals that are highly considered in academic circles. Furthermore, although most of the articles were comprehensible, they were considered neither very interesting nor, albeit with some exceptions (particularly A1 and A2), useful or usable, which explains the generally perceived unattractiveness of the journals.

What follows is a summary of the analyses of each of the measured indicators.

1) Q1 and Q6 – *popularity and attractiveness of the journal*

All of the journals were little known and considered largely unattractive.

The answers to question Q1 (“Do you know the journal in which the article was published?”) (yes = 0 and no = 1) show an absolute lack of knowledge of the journals that published articles A1, A5 and A8; the best-known (albeit with relatively low scores) was the journal containing A2, which was known to 35% of the respondents, but still unknown to 65%.

The answers to Question Q6 (“Would you subscribe to this journal?”) (yes = 0 and no = 1), an expression of the attractiveness of the journal, were also basically negative. The hypothesis of subscribing to the journal did not seem to arouse much interest: all of the journals were attributed scores of more than 50%; the only exception was the third (Business Horizons), which had a result of 40% (i.e. 60% of the subjects would subscribe to it).

2) Q2 – degree of interest in the article

Like the other questions (Q3, Q4 and Q5) question Q2 (“Is the article/subject interesting?”) was answered using a 5-point Likert scale (1 = lowest and 5 = highest). Table 7 shows the mean values and standard errors (SEs) attributed to the eight articles. On the basis of the proportion of respondents giving answers of ≥ 3 (which can be assumed to be positive), articles A1 (0.91), A2 (0.83), A3 (1.00) and A7 (0.86) seem to deal with subjects of interest to the interviewees, whereas the subjects of A4 (0.44), A5 (0.55), A6 (0.33) and A8 (0.50) do not seem to arouse sufficient interest.

3) Q3 – degree of comprehensibility of the article

The degree of comprehensibility seems to be greater. On the basis of the proportion of respondents giving answers of ≥ 3 to question Q3 (“Is the article comprehensible?”), articles A1 (0.77), A2 (0.87), A3 (1.00), A4 (0.67) and A5 (0.73) were judged positively, whereas articles A6 (0.50), A7 (0.57) and A8 (0.17) seem to be insufficiently comprehensible.

4) Q4 – degree of usefulness of the paper

The evaluations of the usefulness of the papers return to being negative. On the basis of the proportion of respondents giving answers of ≥ 3 to question Q4 (“Is the article/research useful (even only potentially)?”), in addition to articles A1 (0.61) and A2 (0.61), only articles A3 (1.00) and A7 (0.57) have a positive score; the subjects of the other articles do not seem to be considered even potentially useful.

5) Q5 – degree of usability of the paper

The judgements concerning usability (Q5: “Is the article/research usable or might it have an impact on company management?”) are even worse. On the basis of the proportion of respondents giving answers of ≥ 3 , aside articles A1 (0.65) and A2 (0.65), only paper A3 (0.80) was judged positively. The scores for the other papers were very low: A4 (0.00), A5 (0.36), A6 (0.17), A7 (0.29) and A8 (0.17).

Tab. 7: Frequencies and mean values with corresponding standard errors (SEs)

	Q1 (Popularity of journal)		Q2 (Interest in paper)		Q3 (Comprehensibility of paper)		Q4 (Usefulness of paper)		Q5 (Usability of paper)		Q6 (Attractiveness of journal)	
	Freq.	SE	Mean	SE	Mean	SE	Mean	SE	Mean	SE	Freq.	SE
A1	0.96	0.043	3.74	0.211	3.23	0.207	2.91	0.226	2.87	0.238	0.87	0.070
A2	0.65	0.099	3.65	0.248	3.48	0.207	2.96	0.255	2.83	0.215	0.57	0.103
A3	1.00	0.000	4.00	0.000	4.40	0.245	4.20	0.374	3.20	0.374	0.40	0.219
A4	0.78	0.139	2.56	0.580	3.11	0.484	1.44	0.176	1.33	0.167	0.78	0.139
A5	1.00	0.000	2.82	0.423	3.00	0.302	2.45	0.434	2.36	0.388	1.00	0.000
A6	0.83	0.152	2.00	0.365	2.50	0.428	1.83	0.167	2.00	0.258	0.83	0.152
A7	0.86	0.132	3.86	0.404	2.43	0.297	3.43	0.571	2.57	0.429	0.57	0.187
A8	1.00	0.000	2.50	0.563	1.83	0.307	1.67	0.211	2.17	0.601	1.00	0.000

Source: our elaboration

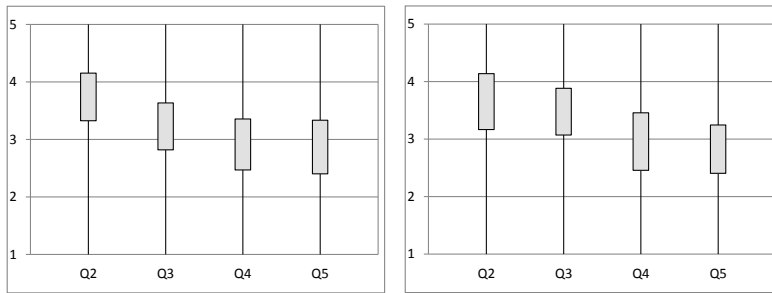
4.2 Confidence intervals of the means

The confidence intervals of the mean values were calculated in order to assess the significance of the results of the previous analysis, but these were

informative only in the case of articles A1 and A2 (the only papers with a large enough number of respondents: n=23). Figure 1 shows the confidence intervals of the mean values attributed to questions Q2, Q3, Q4 and Q5 in relation to the two papers, calculated on the basis of the mean values and SEs shown in Table 7.

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Fig. 1: Confidence intervals for the mean values of the answers to questions Q2, Q3, Q4 and Q5 for paper A1 (left) and paper A2 (right)



Source: our elaboration

As can be seen, in both cases the entire range of the confidence interval of the mean value attributed to question Q2 is above 3, the central value indicating a significantly positive response of the participants. In other words, Q2 (which concerns the degree of interest) is the only one of the four questions whose confidence interval is high for both articles: A1 (3.33, 4.15); A2 (3.17, 4.14). In the case of question Q3 (the degree of comprehensibility), this is only true of article A2 (3.07, 3.89); all of the other intervals fall in the centre of the Likert scale, and so no conclusion can be drawn.

In brief, it can be said that the *degree of interest* and the *degree of comprehensibility* are the only indicators with significantly positive scores: both articles were significantly interesting, and article A2 can also be reliably considered comprehensible.

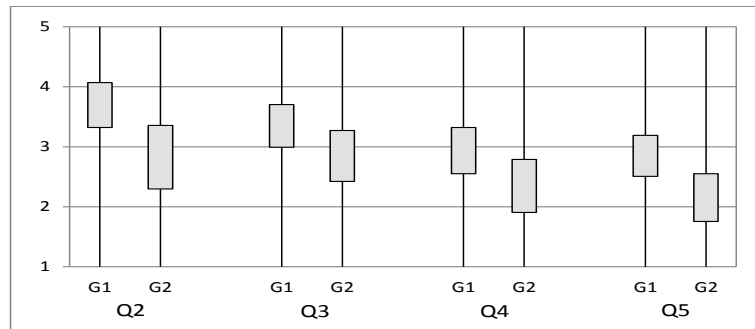
4.3 Comparison of articles A1 and A2 with articles A3-A8

The analyses of mean values, proportions and confidence intervals described above suggest better results for the oldest and most cited articles A1 and A2 than for the decidedly more recent articles A3-A8. In order to verify this perception, the articles were divided into two groups (group G1 consisting of articles A1 and A2, which had been administered to all of the participants, and group G2 consisting of articles A3-A8, which had been distributed in rotation), and the mean values of questions Q2-Q5 were calculated for each group. The mean value of each question was obtained by calculating the mean of the mean values of the scores assigned by each respondent to the individual articles making up each group.

The mean values of questions Q2-Q5 in group G1 were always higher than those in group G2, indicating greater appreciation towards articles A1 and A2.

As shown in Figure 2, the confidence intervals for questions Q3 and Q4 relatively overlap, whereas those for questions Q2 and Q5 are almost separate, thus suggesting a statistically significant between-group difference in the means of the two groups. The subsequent verification of the hypothesis regarding the equality of the mean values of the two groups led to the hypothesis being rejected in the case of questions Q2 (*interest*) and Q5 (*usability*), which indicates that, in relation to these two questions, the two groups can be considered different (with group G1 having higher values than group G2, but accepted in the case of questions Q3 (*comprehensibility*) and Q4 (*usefulness*), which indicates that the differences between the groups are not statistically significant.

Fig. 2: Confidence intervals of the mean values of four questions (Q2, Q3, Q4 and Q5) in groups G1 and G2



Source: our elaboration

In view of the trend towards the greater appreciation of articles A1 and A2, it follows that the two oldest and most cited articles can reasonably and reliably be considered more *interesting* and more *applicable* to company life.

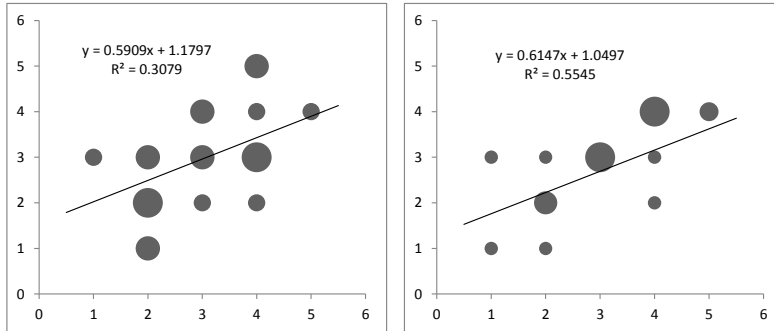
4.4 Correlations and regression analyses

A *correlation analysis* of papers A1 and A2 (for which a larger number of responses were available) was carried out in order to identify any correlations between the answers to Q1-Q6 and between these and the variables relating to the characteristics of the subjects. Surprisingly, although they were all positive, the between-paper cross-correlations of the values attributed to each of the questions were relatively low.

The correlations between the answers to questions Q4 (*usefulness*) and Q5 (*usability*): 0.555 (paper A1); 0.745 (paper A2) are worth noting. Figure 3 shows the least square regression line.

Fig. 3: Least square regression line of Q5 (y axis) plotted against Q4 (x axis) showing the correlation between the answers to questions Q4 and Q5 for papers A1 (left) and A2 (right). The size of the circles is proportional to the number of respondents

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Source: our elaboration

There was also a fair correlation between the answers to questions Q2 (*interest*) and Q3 (*comprehensibility*): 0.479 (paper A1); 0.505 (paper A2). This suggests that the interest in both papers was related to its readability which, albeit not very closely, also correlated with question Q4 (*usability*): 0.334 (paper A1); 0.479 (paper A2).

Various regression analyses were carried out with the aim of identifying any dependence between the answers to questions Q2-Q5 in relation to papers A1 and A2 and the characteristics of the subjects (covariates: gender, age, education, job position, size of firm, and reading habits). In the case of paper A2, there were no significant regressions; in the case of paper A1, education seemed to play an important role in explaining the answers to Q2 (*interest*) and Q4 (*usefulness*), for which the following two regressions were obtained (the standard errors of the corresponding parameter estimates are given in parentheses):

$$Q2 = 0.780 + 0.767 \text{ gender} + 0.276 \text{ age} + 0.815 \text{ edu.} + 0.109 \text{ job} + 0.116 \text{ firm} + 0.101 \text{ reading}$$

$$(1.086) (0.470) (0.174) (0.460) (0.248) (0.085) (0.378) \text{ and}$$

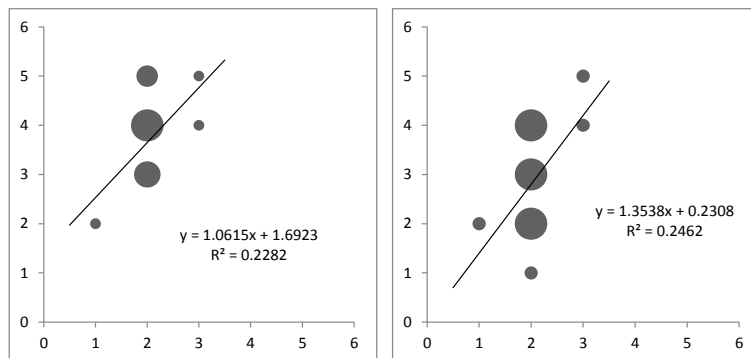
$$Q4 = 1.475 + 0.205 \text{ gender} - 0.353 \text{ age} + 1.288 \text{ edu.} - 0.484 \text{ job} + 0.173 \text{ firm} - 0.214 \text{ reading}$$

$$(1.273) (0.551) (0.204) (0.539) (0.291) (0.100) (0.443)$$

The *F* statistic significance levels were respectively 0.123 and 0.071.

Education is visibly and highly significant, and age may play some role. In the case of education, a one unit increase implies an increase of 0.815 in the answers to Q2, and 1.288 in the answers to Q4 (using the coding shown in Table 5. It is worth noting that the small sample size prevented the use of dummy variables). Figure 4 shows the marginal relationship between education and the answers to Q2 (left) and Q4 (right).

Fig. 4: Paper A1: least square regression line of Q2 (y axis) plotted against education (x axis) (left), and Q4 (y axis) plotted against education (x axis) (right). The size of the circles is proportional to the number of respondents



Source: our elaboration

Finally, regression analysis was carried out to explain the answers to Q4 (*usefulness*) not only in terms of the above covariates, but also in terms of the answers to questions Q1 (*popularity of journal*), Q2 (*interest*) and Q3 (*comprehensibility*) related to paper A1 (the only questions with significant regressions). Regression analysis was not applied for Q5 because of its similarity to Q4. In this case, the most important predictors were age (-0.687; SE 0.228), education (1.113; SE 0.540) and the answers to Q1 (2.065; SE 0.913), and the F statistic significance level was 0.040. Although there was a positive correlation between the answer to Q4 (*usefulness*) and education, the paper was considered less useful by older respondents and those who knew the journal.

The correlation and regression analyses of articles A1 and A2 revealed some correlations between the answers and highlighted some possible relationships of dependence between the answers and the characteristics of the respondents. From this perspective, the following should be recalled:

- the correlation between usefulness and usability *revealed a certain homogeneity between the two indicators*;
- interest in a paper seemed to be related to its *readability*, which also correlated (albeit not very closely) with judgements concerning its *usability*: in other words, *the readability of a paper may condition assessments of its ability to be interesting and/or usable*;
- among the characteristics of respondents that seem to be dependently related to the given answers, education plays a significant role: *higher levels of education relate to greater expressed interest in a paper or its subject and, even more, to judgements of greater usefulness*;
- judgements of usefulness inversely correlate with age and knowledge of the journal: *respondents who are of a certain age and know the journal are more severe with their judgements of usefulness*;
- it follows that, although a higher level of education leads to a greater appreciation of the articles, the experience acquired with age and knowledge of the journal seems to lead to the view that scientific publications in the field of management are not very useful.

5. Discussion

As the aim of this study is to make a theoretical contribution based on empirical evidence, specific care was taken when developing its three-phase research strategy. The first phase involved a study of methodology and led to the construction of the research framework, which was then applied to a pilot survey of a non-probabilistic sample of entrepreneurs and managers aimed at revealing their judgements concerning the interest, usefulness and usability of some papers that had been published in a selection of the most authoritative international management journals. In order to validate the research approach, the third phase will consist of a survey of a representative sample of more than 300 Italian entrepreneurs and managers to whom a questionnaire accompanied by articles extracted from selected journals that each respondent will be asked to read and evaluate will be administered.

The increasingly intense national and international debate concerning the relevance of management research has given rise to many different and often opposing positions that make it difficult to envisage reaching a definite and unitary view. An analysis of the literature shows that the very concept of relevance is difficult to measure, as its defining traits are characterised by a certain level of ambiguity and the meaning that is attributable to them is rather complex (Augier *et al.*, 2007).

Within the context of this dialectic, it has emerged that there is need for a rigorous and systematic study of relevance in order to clarify whether and in what ways the results of university scientific research are used in practice (Kieser *et al.*, 2015). As a result, it is important to consult practitioners directly in order to collect their judgements of the usefulness of academic management research. We have therefore constructed and tested a rigorously systematic framework in order to enable us to investigate the way in which managers perceive management research, with the aim of increasing the relevance of academic research strategies and the editorial policies of management journals.

Furthermore, it is clear that the ongoing debate cannot remain confined to academic circles, but needs to involve practitioners with whom a synergistic dialogue may be established because there are many points of contact between university and entrepreneurial/managerial environments that can be optimised in order to generate and distribute value throughout a national or area system (Borgonovi, 2007). Professional communities need to be helped to “see beyond the action” and the everyday life of competition, and explore “the horizons of the possible” in order to initiate “a discussion that raises questions and seeks the answers until they are found, and then sets off again in the search for other questions” (Baccarani, 2015). At the same time, they should ask management researchers to study problems that are relevant and interesting to them, and observe the more complex and dynamic situations that firms have to face (Soda, 2015). This dialogue between the two worlds should be qualitatively refined and sufficiently detailed to ensure the growth of both, allowing one to see “their ideas put into practice” and the other to “extend their knowledge of the foundations and innovative models of management” (Carella *et al.*, 2015). It should in fact permeate the very fabric and structure of a country’s economy and

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entrepreneurial activities. The value of research and education increasingly lies in its quality, which in its turn is intrinsically related to its capacity to explain economic phenomena and train people who are capable of governing them (Borgonovi, 2007).

The fundamental concept of management research that this study intends to support should focus on subjects that are of real interest to practitioners, satisfy the need for rigour required by positive sciences, and be capable of producing knowledge that has a strong impact on professional communities: i.e. it should exert a direct influence on managerial practices, however complex the organisational processes underlying the implementation of its results.

The academic contributions considered most interesting “are more likely to induce positive affect and are also more likely to be read, understood and remembered” (Bartunek *et al.*, 2006). Furthermore, they may be essential for attracting, motivating, and retaining talented and enthusiastic doctoral students, particularly those guided by the thought of gaining and developing truly relevant knowledge that might change the world of organisations (Vermeulen, 2005, 980-981).

We agree with others that producing methodologically rigorous contributions aimed at answering important research questions and capable of arousing interest increase the visibility and impact of management research partially by motivating the readers they are intended to involve (Bartunek *et al.*, 2006). It is therefore important to emphasise that the dissemination of research results and acquired knowledge need to be favoured by using forms of language that encourage the participation of the readers with whom the academic world intends to communicate. As pointed out by Stadler (2015), “leaders usually don’t have the time to battle with the inaccessible prose of academic articles (...). It is of cumbersome jargon, heavily focused on theory, and there is so much of it that it is hard to find the most relevant articles.” Under these conditions, one wonders how managers can gain access to the knowledge published in academic journals.

The largely standardised formats and styles that tend to be used when preparing a scientific article could be conveniently abolished if, rather than driving readers away, it were necessary to stimulate their thoughts and innovative spirit, and highlight the relevance and usefulness of research to entrepreneurial practices and concrete problem solving, or to identify new answers to old and new questions.

6. Conclusions

This study has some limitations which, along with the obtained results, have allowed us to consider the future course of the project as a whole in greater detail, particularly the need to adjust the protocol of the extended survey in order to strengthen its effectiveness.

The pilot study revealed a number of quantitative and qualitative inadequacies in the research framework (Brunetti *et al.*, 2015) concerning the selection of the journals and papers, the extraction of the study sample,

and the structure and composition of the questionnaire. The evaluation concerned only eight articles and eight journals; furthermore, the number of involved practitioners was also limited, and they were not interested in the subjects of the papers they were asked to assess.

There are also some limitations related to the research method used for the pilot study itself. In the first place, the personal relationship between the authors and the interviewees may have partially falsified the results by orienting them towards an overestimate of the positive judgements. This risk was compounded by the assumption that the answers with a score of >3 could be considered positive, a prudential choice, given the uneven number of possible answers.

In relation to the personal information that the practitioners were asked to provide, the covariates could have been better specified, particularly in the case of education and job positions. As many as 8.64% of the respondents indicated their educational qualifications as "other" which, in the absence of further details, does not allow any further considerations to be made. Furthermore, 56.52% of the respondents said they were line or function managers, and the absence of any further information about the type of functional area once again prevents a more detailed analysis of the characteristics of these non-probabilistically selected subjects.

The identification of these limitations will allow us to modify the questionnaire in order to improve the data analysis: for example, it has been considered necessary to review the questions relating to the demographic and personal variables of the subjects in order to specify the covariates more appropriately. It is also necessary to introduce an even number of possible answers in order to avoid the risk of overestimating positive results and to facilitate the calculation of proportions.

The probability of receiving a response may be increased by reducing the number of articles administered to each subject, and using a system of rotation when distributing the articles that have been selected for evaluation in order to cover the entire sample.

The possible risk that the interviewees may be influenced by a sense of reverence could be reduced by means of the differences among the answers relating to various types of articles; furthermore, the selected articles could include one that acts as a control variable.

Finally, considering the content of the future survey, we wonder whether it would be appropriate to retain the comparison of articles published in different periods. There was a 20 year difference in the present study which, among other things, revealed a trend towards greater interest in older papers, which were also recognised as being more applicable to company practice.

In the light of the results and limitations of the present study, we have started to reconsider many aspects of the future survey: the sample of interviewees, the type of articles, improvements in the questionnaire, and the need to encourage a larger number of respondents.

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How universities institutionalize ‘good’ managerial practices? Some evidence on the Italian cultural sector¹²

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Abstract

Purpose of the paper: This study aims to analyze the role of Italian universities in the ‘managerialization’ process of the cultural heritage sector, which is under a major process of change, merged in the recent reform of the Italian museums’ system.

Methodology: This work adopts the new-institutionalism perspective to draw a quali-quantitative analysis of the offer of masters in Management (at both first and second level) of the Italian Universities. In particular, it presents a content analysis of the most recurrent profiles of masters activated by Italian Universities that are consistent with the issues of the cultural heritage sector.

Findings: The main finding of the research is the presence of ‘window dressing’ in which the real contents of the master are not contextualized in the cultural sector.

Research limits: This work gives only the results of a first step of analysis. The group wishes for an extended time of work aimed at developing a longitudinal analysis of processes of formation.

Practical implications: This study, by bringing out the close interconnections between universities and the cultural heritage sector, reveals the necessity of a partnership that makes more coherent the educational path and the demands of the cultural sector.

Originality of the paper: This study presents a content analysis on the most recurrent profiles of masters activated by Italian Universities that are consistent with the issues of the cultural heritage sector, in order to observe the presence of “normative isomorphism”.

Key words: cultural management; artistic-cultural heritage; neo-institutional perspective; decoupling; isomorphism

1. Introduction

University is an institution dedicated to carrying out a public function, at the service of the national community and the social and institutional reality operating in the same area. In addition, it is committed to play the role of central node within the dense plot of relations that constitutes the European

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transnational system oriented to the growth and knowledge sharing, to the critical transmission of it according to the quality and excellence orientation.

For this reason, Universities play a role of social utility, taking the character of a “political entity” in the process of cultural, social, and economic development with a natural tension to the quality of training. Hence, the need that the training action developed at the national and international level should be ineludibly planned and shared with other political and institutional actors participating, in a view of planning, to the identification of the trajectories of growth of a country and its community. The quality that qualifies the released service becomes an expression of the target market’s satisfaction, compared to the characteristics of the education offered and the research system. Therefore, the attention, for those who study and analyze the educational path, focuses on the ability of the university system as a whole to choose valuable targets and achieve them, adopting behaviors needed to measure and improve the affinity objectives/results (Sirilli, 2010).

However, the ability to plan and achieve ‘adequate’ and ‘with value’ goals/results for the university’s actors goes hand in hand with:

- the demands coming from the institutional bodies, responsible for planning the educational offer of the university (Ministry of Education, University and Research, henceforth MIUR);
- and, at the same time, the demands coming from other actors who, although are not part of the university system, are able to orient their address.

Therefore, it is required that universities adapt themselves to the ministerial directives, planning their offer in line with the provisions of the changed institutional framework and not initiate a program free from the expectations of the target market and, consequently, of the requests coming from the labor market.

Therefore, although the Italian universities are acting in compliance with their margins of *autonomy* and *responsibility*, recognized by the MIUR, they cannot be separated from the influence of actors, who seemingly are not part of the training field, but can exercise institutional pressures on educational planning. Actually, Italian universities operate within a system governed according to the principle of autonomy. Their autonomy, even if constitutionally guaranteed, is circumscribed by a number of regulatory constraints that guide the decision-making process, as well as by the action of the socio-political and institutional framework in which these constraints are formalized. The institutional pressure, used by these actors that ‘praise the change’, is widely formalized in the adjustment process of the choices made within the universities, when chasing the updating of legislation.

However, if on the one hand the alignment of universities, sometimes required as well as appropriate, to such contextual dynamic conditions at the level of strategic autonomy, combines itself with that of training’s responsibility, on the other hand it is possible to read such behavior in the universities’ governance as an attempt to exert pressure on the local context, to the point of influencing the configuration of the existing

institutional framework. That is to say that in the Italian university system can be recognized the power to define, in consultation with other political and institutional actors, the guidelines for the process of training and of the use of the knowledge acquired for the development of various economic sectors, particularly in reference to the public service sector (Nigro *et al.*, 2014a).

This is because Universities are, in a very broad sense, institutions whose mission is to promote and support the dissemination of knowledge and the development of new skills in the society. They do so essentially through research and teaching activities. At the same time, Universities, along with other institutional actors, “select” the knowledge to be transferred to the Students, via their undergraduate curricula and programs, and the practices to be applied to the workplace, via professional masters and similar educational schemes.

Universities, in this perspective, play a key role in the process of dissemination of knowledge, preventively selecting its effectiveness compared to the economic context in which the same will be used (Nigro *et al.*, 2013).

In this work, we refer to the process of professional training planned for the Italian cultural heritage sector. This sector is under a major process of change, merged in recent reform of the Italian museums’ system (Franceschini’s Museums Decree of 23 December 2014). This decree, arrival point of the Italian political debate on the museums’ governance, marked the transition from a governance and management system, although apparently, committed to experts to a system entrusted to ‘professionals’. Actually, the managerialization and, then, professionalization themes of human resource, intended to the protection, preservation, and promotion, have today become the leitmotif of the political debate. This has induced the Italian Minister Franceschini, Minister of Ministry of Cultural Heritage and Tourism (henceforth MiBACT), to declare that he will select the future directors/executives of museum organizations according to the possession of rewarding capacity of government and management, on the basis of the best practices of governance and management present in the territory (Nigro *et al.*, 2015).

In synthesis, this decree represents, for the Minister of MiBACT, the instrument to ‘revolutionize’ the organization and function of the national state museums, leading this organization to ‘modernization’; the ‘modern’ organizations will be characterized by a high degree of professionalization, which will ensure the dynamism in governance and management (Nigro *et al.*, 2014b; Nigro *et al.*, 2015).

The conciliation between the actions promoted by the universities in the process of dissemination of good managerial practices and the new institutional framework established by the Franceschini’s Decree in the field of cultural heritage, defines the reference scenario for the considerations that we are going to propose.

2. Research objective

The outlined scenario is characterized on one hand by both the action carried out by the Italian universities aimed at the dissemination of knowledge and the development of new skills in the society and, on the other hand, by the changed institutional framework related to the cultural heritage sector. This contribution intends to answer the following question:

How universities participate in the institutionalization process of 'good' managerial practices?

To answer this question, the research group decided to focus on the professionalizing training process developed by Italian universities. In particular, we focus on the 1st and 2nd level of professionalizing master, active in the 2014-2015 academic year. Based on the evidence of the proliferation of professional courses aiming at spreading the managerial culture into the Italian cultural sector, we adopt the new-institutionalism perspective to draw a quali-quantitative analysis on the offer of masters in Management. The main aim of the research is to observe if and how the dissemination of selected "good" managerial practices is attributable to isomorphic processes based on the pursuit of legitimacy and consensus in a certain institutional context.

To this end, the following sections contain: the preliminary part, composed by a brief reconstruction of political and scientific debates on cultural heritage governance; secondly, the methodology (new-institutional perspective); then, the reflections of the research group on the role that Universities currently have in the diffusion process of professions related to the cultural governance and management. In particular, in order to observe the presence of "normative isomorphism" in these processes, we will present the results of the content analysis on the most recurrent profiles of masters activated by Italian Universities that are consistent with the issues of the cultural heritage sector.

We expect to find the Italian University moving to a direction dedicated to the training needs of tourism and cultural heritage management. The research for a closer link between the need of specific skills for cultural management and the identification of appropriate structures and curricula is one of the main objectives of the legislator, as established by Franceschini's Decree.

The Italian Universities are currently interpreting these views of the legislator, regarding the managerialization and professionalization of cultural heritage; they participate, as actors of the organizational field, in the institutionalization of the new structure of governance of the Italian cultural heritage, contributing to the dissemination of its managerial practices.

3. Literature review: the recurring theme of managerialization/ professionalization in the cultural heritage sector

The scientific debate on the professionalization of cultural heritage has been enriched over time with interesting contributions that have explored

the traits, both traditional and innovative, characterizing the governance and management of the artistic and cultural heritage of the country. In particular, in recent years, has gradually emerged a deep attention to the managerialization process of cultural organizations, particularly of museums, consistent with the guideline that has oriented the current change of direction of the public decision-makers in the field of cultural governance.

This is to say that it is possible to find an in-depth analysis of this theme in the scientific debate, read and interpreted in the light of the evolutionary process that has affected and is still affecting the institutional framework of the sector³.

The reference is to the prevailing economic and managerial literature that has repeatedly shown to managerialization the direction to be taken to overcome the difficulties that characterize the dynamics of governance of the Italian artistic and cultural heritage (Zan, 1999; Wizemann and Alberti, 2005; Nigro *et al.*, 2011). The managerialization process, that is not new in the public sector, is proposed as a way out of a system traditionally centered on the protection-conservation of the artistic-cultural heritage. At the same time, it is also proposed as the opportunity to make concrete the promotion of 'culture' and 'territory' on which the same is established, especially if we analyze the state museum sector.

These few summary notes on the debate provide an immediate perception of the directions of the scientific debate that clearly reinterpret the guidelines of the political debate. These guidelines include traditional governance, suited to the protection and preservation of heritage, in view of an innovative one, therefore 'modern', suited to the promotion of the same; close interdependence between culture and territory, i.e. between culture-resource and socio-economic development of territory. Both of these guidelines converge in the managerialization of culture, with important reflections on the profile of the responsible for the organization and promotion of its professionalization (Grossi, 2006; Tamma, 2010; Franch, 2010; Montella, 2009, 2012).

The introduction of the concept of promotion in the regulatory framework calls for the creation of *culture management*. This is a discipline that is not defined by terms of positioning in relation to the managerial, administration, strategic planning, management control, organization, and marketing studies (Franch, 2010), although it is closely linked to the role of 'professionals of culture' and on the related skills aimed at value creation (Dragoni, 2005, 2010; Petrarola, 2010; Golinelli, 2012; Montella 2009, 2012) in terms of the territory's sustainability and, then, of the cultural heritage (Segre, 2005). The cultural manager is, therefore, one that: produces the 'context of culture-user interaction' where he manages and controls effectively the process of socialization (Tamma, 2010); rediscovers in art and culture "the local development factors in the same way of the availability of material factors or specific environmental resources" (Franch, 2010, p. 98); and enhances the cultural resources of the single museum, in line with the territory, making unique the 'cultural experience'.

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³ The evolution of the regulatory framework of the cultural heritage sector can be found in CABI volume, to be published within the 2016.

Nonetheless, the result of the managerial scientific debate, in an attempt to propose corrective actions to critical issues, is consisted in the transfer of interpretive schemes and a language typical of the traditional managerial to the museum sector. By giving, however, a short-sighted and, at the same time, rhetoric vision, focuses its attention to the strategies adopted by organizations designated to the promotion in order to analyze the effective 'ability to create value' (Dragoni, 2010).

It is worth stressing, to complete the outlined framework, that the recent scientific debate has been enriched by business management studies, focused on the organizational and economic-financial autonomy recognized to the museum organizations by the current regulatory framework. This field of study describes the main features of the organization and management of the museums according to the efficient and effective use of scarce resources (Bagdadli, 2003; Bagdadli and Paolino, 2005; Jalla, 2000; Lord and Lord, 1997) and links the success of management to the improvement of economic performance (Chiriélison, 1999; Solima, 1998).

These features take on higher value since the organizations are, still today, heavily dependent on public financing (Zan, 1999). The rapid evolution of the social, economic, legal, and institutional context, the change in the demand for culture, the spread of information technology, the reduction of State support to the cultural sector, and the lack of services for visitors call for the definition of new professional profiles. These professionals should be in possession of new skills and competencies that can ensure the performance of conscious, competitive and, therefore, strategic conducts.

The different positions taken by scholars who took part in the scientific debate appear to converge on the theme of professionalization/managerialization of actors designated to the governance and management of cultural sector. The convergence on the recurring theme is the starting point of the study conducted by the research group. Its early results are proposed in the following sections.

4. Methodology

4.1 The new institutional theoretical approach: focus on isomorphic process

According to the new institutional perspective, the choice of organizational solutions or the adoption of better practices of management responds to pressures of isomorphism, a source of political power and legitimacy (DiMaggio and Powell, 1983). In this section are individuated the persistent institutional pressures on organizations and individuals.

The reflections that are proposed in this paragraph have their roots in an earlier essay on new institutionalism: in a society thickly populated by institutions, "organizations are induced to incorporate behaviors and procedures defined by prevailing concepts of institutionalized organizational work. Organizations acting in this way increase their legitimacy and their survival regardless immediate effectiveness of the rules of conduct and acquired procedures" (Meyer and Rowan, 2000). Actually,

the new-institutional perspective, focusing on the material and symbolic conditioning that institutions pose against individuals and organizations, puts at the center of its analysis isomorphic processes. Through it, the actors, searching legitimacy, tend to look alike, joining institutionalized rules, often leaving aside their immediate effectiveness.

To be clearer, it is appropriate to specify that:

- the 'institutionalized rules' are classifications built within the company as typifications or shared interpretations (Berger and Luckmann, 1969). For example, norms, moral principles, codes of conduct, procedures, and conventions;
- the 'research of legitimacy' leads the organizations to obey to the pressures of the institutional environment to act in an appropriate and adequate way for the purposes evaluated positively by the community (Meyer and Rowan, 2000); not infrequently organizations, searching legitimacy, make efforts conflicting with the demands of efficiency.

In this way, the organization obtains benefits from isomorphism: looking at the competitive and institutional dynamics, a greater compliance can facilitate relations with other organizations, increase the chances of attracting highly motivated staff and obtain financing. Looking at the intra-organizational relationships, the isomorphism reduces internal disorder, because the conformity to the legitimized rules also solves the internal conflict on the objectives of the organization, while maintaining the stability of the *pro-tempore* dominant coalition.

It is necessary to specify that when we say 'institutional pressures', we refer to institutional isomorphism and, so, to 'coercive', 'mimetic' and 'normative' isomorphism (DiMaggio and Powell, 2000; Mastroberardino *et al.*, 2013). In particular:

- coercive isomorphism derives from the pressures exerted on formal and informal organizations by other organizations considered influential. These pressures are perceived by the actors as impositions, demonstrations of force and persuasion;
- isomorphism is mimetic when companies, facing the uncertainty of the environment, start spontaneously imitative processes. In this case the imitation acts as a surrogate of certainty, that is to say "if all act in this way, it means there is a reason";
- normative isomorphism is connected to the professionalization and the role that it has in the institutionalization of rules. Formal education creates professionals for a certain position, 'interchangeable' for way of thinking, acting, and schemes to meet.

Compared to these processes, Universities and professional training institutions have a crucial role in the development of new skills related to the themes of the efficient and effective use of scarce resources, promotion of cultural heritage, sustainability of the territory and so on.

The search for legitimacy is the basis of the homogenization process for all types of institutional isomorphism. In the first case it is obvious that if the organization does not comply with the imperatives of the environment, it will exclude itself from the competitive environment.

In the mimetic isomorphism, uncertainty is an important factor that encourages imitation. When the competitive conditions are unclear,

organizations may model themselves to other organizations to avoid the risk of 'being wrong'.

In the normative isomorphism, to appear professional, actors are called to conform their behavior to institutionalized rules: this produces a normative and symbolic framework for the category. The compliance with this framework makes the actors 'rational', legitimizing their act. The adoption of a 'deviant' behavior creates conditions for the failure of themselves and the organization. Memberships of professional associations of managers is undoubtedly the cause for the spread of practices considered legitimate, but not necessarily effective (Ghoshal, 2005).

The early new institutionalism, however, has not only provided a classification of institutional pressures, but has also carried out the study of the transmission of the rules in the network of organizational relationships. Meyer and Rowan identified the reasons in the 'rationalized myths', bearers of beliefs and practices socially approved, because they are believed to be rationally effective or to have a legal basis. The professions were raised to rationalized myths, as it is believed that they check a series of behaviors and effects, through the requirements of a role and the expectations of a company (Meyer and Rowan, 2000). The myth of the profession then becomes an instrument of external evaluation of its performance. The spread of the myths is a consequence: if an organization has to adopt certain technologies, is essential to train people for that purpose; training, in a vicious circle, leads firms to organize themselves according to the institutionalized rules, the control of certain institutionalized rules asks the law to intervene on the same, and so on.

For Powell and DiMaggio the reason of homogenization has to be found in 'organizational fields'. They define these as the "organizations which, in the aggregate, constitute a recognized area of institutional life: key suppliers, resources and product consumers, regulatory agencies, and other organizations that produce similar services or products" (DiMaggio and Powell, 1983; p. 148). The concept of 'organizational field' does not refer to any geographical area. Rather, it is configured by the relational dynamics that are developed in it. Literature describes it as a recognized area of institutional life that carries out actions of standardization and controls on organizational actions, exerting pressure so that they conform to shared standards of performance (isomorphism). These standards find their legitimacy by being adopted over time, rather than by their own rationality (DiMaggio and Powell, 1983; Scott, 1987; DiMaggio and Powell, 2000; Bonazzi, 2002), directing the operation of social organizations inserted in institutionalized contexts, limiting *de facto* alternative behaviors. To the organizational fields belong all the actors that even indirectly contribute to define certain standards in management, technology, research and new product development, human resource management and personnel policy.

Another issue to consider is the effect of institutional pressures on organizations. This depends on the degree of institutionalization of the rule. Zucker (DiMaggio and Power, 2000) argues that the processes of institutionalization have different forces in preserving and transmitting certain cultural content: the more an institutionalized act shows high degree of formality and solemnity, the more effective and lasting will be

the transmission of its cultural content and less freedom will be left to the parties in breaking and rebuilding the framework of rules and standards. The exogenous shocks that interrupt the process of reproduction of institutionalized patterns, enabling change, can be identified as opportunities to be exploited for the recovery of margins of maneuver by actors. It can be said, therefore, that the margins of intervention on the institutional framework are a function of the degree of 'cultural persistence'. This means that some organizations respond to external pressures faster than others, becoming homogeneous more quickly, while others change only after a long period of resistance.

In the outlined scenario, the dynamics of professionalization and the diffusion of managerial practices in governance and management of cultural heritage must be addressed to the processes of social legitimacy and institutional isomorphism known as processes, rather than to be understood through the analysis of the elements of intrinsic technical rationality (DiMaggio and Powell, 1983). In particular, we refer to the processes of normative isomorphism, through which there is a spread of professional standards and procedures on organizational characteristics. The higher the degree of institutionalization of such standards, due to the spread in the field of management practice as well as the influence of the relevant professional groups, the higher the number of actors that will conform to these standards, adopting legitimized practices.

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4.2 Sample description

The research group has investigated the presence of normative isomorphism (connected to the professionalization and its role in the institutionalization of the rules) starting from the assumption that Universities have a crucial role in the development of new skills. For this reason, the group has tested its research questions on a sample of masters (first/second level) related to the professionalization in the cultural heritage's field. The sampling process followed four steps:

- 1) it individuated all the professional masters currently activated by universities and training institutions (approximately 1650);
- 2) it selected the masters regarding the 'managerialization' of the cultural sector (105);
- 3) it chose the masters referring to the 2014/2015 academic year (74);
- 4) it considered only the masters having a detailed brochure available for download (34).

4.3 Categories of analysis

In order to observe the presence of "normative isomorphism" in the processes of dissemination of selected "good" managerial practices, based on the pursuit of legitimacy and consensus in a certain institutional context, the analysis was divided into two categories:

- *descriptive analysis*: used to describe the basic features of the data;
- *content analysis*: used to distil words into fewer content-related categories.

4.3.1 Descriptive analysis

The descriptive analysis was conducted for all the professional masters activated for the 2013/2014 academic year. In particular, the analysis was conducted for the 'Region', 'Edition', and 'Field' items (Tables 1-3). This analysis offers a synthesis of the data reported. In this case, the descriptive analysis of the above-mentioned items is limited to the measures of frequency and percentage.

Tab. 1: Distribution of professional masters by Region

<i>Region</i>	<i>Frequency</i>	<i>Percentage</i>
Lazio	21	28,4
Lombardia	13	17,6
Emilia Romagna	6	8,1
Veneto	6	8,1
Toscana	6	8,1
Campania	5	6,8
Calabria	5	6,8
Puglia	3	4,1
Piemonte	2	2,7
Sicilia	2	2,7
Trentino	2	2,7
Abruzzo	1	1,4
Friuli Venezia Giulia	1	1,4
Marche	1	1,4

Source: personal elaboration

Tab. 2: Distribution of professional masters by Edition

<i>Edition</i>	<i>Frequency</i>	<i>Percentage</i>
Not available	35	47,3
1 st	16	21,6
8 th	4	5,4
5 th	3	4,1
10 th	2	2,7
11 th	2	2,7
12 th	2	2,7
13 th	2	2,7
3 rd	2	2,7
4 th	2	2,7
15 th	1	1,4
17 th	1	1,4
35 th	1	1,4
9 th	1	1,4

Source: personal elaboration

Tab. 3: Distribution of professional masters by Field

Field	Frequency	Percentage
Management	34	45,9
Humanities	13	17,6
Communication	8	10,8
Architecture and design	6	8,1
Economics and financial	5	6,8
Social science	3	4,1
Political science and international relations	2	2,7
Law disciplines	1	1,4
ICT	2	2,7

Source: personal elaboration

4.3.2 Content analysis

The content analysis followed two steps: 1) it was conducted on the title of the professional masters active in the 2014-2015 academic year (74 masters); 2) it regarded the analysis of the available brochure (22 masters). In particular, the latter was divided in two parts: firstly, it refers to the analysis of the same code utilized for the masters' titles; secondly, it focuses on the search of codes that better explain the managerialization/professionalization process. Those sections aim to draw an early picture about the use of some 'code' in the title and program of professional masters. These were analyzed through a conventional content analysis, which is a qualitative research method used to interpret the content of text data through a systematic classification process, involving coding and identifying themes (Krippendorff, 2004). The results of content analysis on the masters' titles and on the master's brochure, on the repetition of codes qualifying the managerial matrix of professional training in the tourism and cultural heritage sector, are presented in Tables 4 and 5.

Tab. 4: Content analysis on the a.y. 2014-2015 masters' titles

Codes	Frequency
Management/gestione	44
Cultura/culturale/culturali/cultural	32
Turismo/turistica/turistico/turistici	23
Territorio	11
Art/arts/arte/arti	8
Comunicazione	7
Patrimonio	7
Beni culturali	6
Valorizzazione	6
Patrimonio culturale	4
Heritage	4
Eventi/evento/event	3
Archeologia/archeologico/archeologica	2
Museum/musei/museo	2
Museologia	2
Tutela	1
Curatore	1

Source: personal elaboration

Tab. 5: Content analysis on the a.y. 2014-2015 masters' brochures

<i>Codes</i>	<i>Frequency</i>
Cultura/culturale/culturali/cultural	654
Management/gestione	629
Turismo/turistica/turistico/turistici	502
Art/arts/arte/arti	288
Museum/musei/museo	195
Eventi/evento/event	159
Comunicazione	150
Territorio	95
Valorizzazione	79
Heritage	70
Patrimonio	70
Beni culturali	64
Curatore	31
Tutela	24
Archeologia/archeologico/archeologica	19
Patrimonio culturale	15
Museologia	4

Source: personal elaboration

The repetition of 'Cultura/culturale/culturali/cultural' and 'Management/gestione' codes in the brochures, as well as in the masters' titles, confirms the desire of the trainer to underlie the promotion of professional and managerial nature of the educational paths offered to the marked. At the same time, it may provide a first indication with respect to the alignment between the trainers and the language used in the brochure, which as a communication tool to the potential user, is dedicated to making the educational path more attractive.

To confirm this language alignment, the research group decided to develop a second phase of content analysis on masters' brochures, focusing on the use of codes that had shown better the attempt of Italian universities to bring out the professionalizing nature of their courses (Table 6).

Tab. 6: Content analysis on the masters' brochures (professionalizing/managerialization codes)

<i>Codes</i>	<i>Frequency</i>
1. Professionale/professionali/professional/professionals/ Professionalizzazione/professionalizzante/professionalizzanti/ professionalization/professionalizing	180
2. Competenza/competenze/skill/skills	177
3. Stage/stages/tirocinio/tirocini	158
4. Attestato/attestati/certificazione/certificazioni/certification/ certifications/certificate/certificates/certificazione/certificazioni	77
5. Manageriale/manageriali/managerial/managerials/ managerialization/managerializzazione/formazione manageriale	50
6. Figura professionale/figure professionali/profilo professionale/ professional figure	35
7. Placement	19

Source: personal elaboration

We chose the codes for the following reason: 1 and 5 were chosen because they qualify the process of professionalization/managerialization currently underway, while 2, 3, 6, and 7 were chosen because they have a structural nature compared to the supplied formative service.

In order to better investigate the professionalization/managerialization process, we developed a cross tabulation (Table 7), crossing the codes of Table 6 with respect to a single brochure, not considering codes having a frequency of less than 50.

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Tab. 7: Cross tabulation of masters' brochures and professionalization/managerialization codes⁴

Master's brochures	Professionalizing Professional etc	Stage Tirocinio ect	Managerializzazione Managerialization etc	Attestato Certificato etc
1	9	18	10	0
2	3	2	2	0
3	4	0	0	2
4	14	1	1	0
5	1	3	0	0
6	1	0	0	2
7	3	4	1	0
8	3	4	1	0
9	2	9	1	1
10	12	1	7	1
11	5	0	5	13
12	3	4	1	0
13	5	3	1	0
14	3	4	0	0
15	27	0	2	3
16	1	6	0	0
17	1	5	3	0
18	1	3	2	1
19	1	3	0	0

⁴ 1) Economia e Management dell'Arte e dei Beni Culturali; 2) Gestione dei Beni Culturali; 3) Art; 4) Tourism e Mangement; 5) MEMATIC; 6) Arti, Architettura, Città; 7) Management-Promozione-Innovazioni Tecnologiche nella Gestione dei Beni Culturali; 8) Valorizzazione turistica dei beni ambientali e culturali; 9) World Natural Heritage Management; 10) MAMA; 11) EMHM; 12) Valorizzazione turistica dei beni ambientali e culturali; 13) Turismo e ICT; 14) Servizi Educativi per il Patrimonio Artistico, dei Musei Storici e di Arti Visive; 15) Arts Management; 16) Diritto dell'ambiente e del territorio; 17) Economia e gestione del turismo; 18) MaBAC; 19) Sviluppo creativo e gestione delle attività culturali; 20) Tourism Quality Management; 21) PITT; 22) Design dei Servizi Turistici; 23) Management del turismo; 24) MAGPA; 25) MAGPA II; 26) World heritage and cultural project for development; 27) MEC; 28) Progettare cultura. Interventi d'arte, cultura e design per città, imprese e territory; 29) Culture Simboliche per le Professioni dell'Arte, dell'Educazione e della Cura; 30) Esperto Management Aziende e Servizi Turistici (base); 31) Esperto Management Aziende e Servizi Turistici (avanzato); 32) Economia della Cultura: Politiche, Governo e Gestione (indirizzo generale)/International Master in Economics of Culture: Policy, Government and Management (Indirizzo internazionale); Marketing e organizzazione di eventi; 34) Progettazione e promozione degli eventi artistici e culturali (PPEAC).

Master's brochures	Professionalizing Professional etc	Stage Tirocinio ect	Managerializzazione Managerialization etc	Attestato Certificato etc
20	37	33	5	24
21	2	1	0	0
22	6	9	0	3
23	11	14	1	18
24	0	0	2	0
25	0	0	2	0
26	4	0	0	0
27	3	8	0	1
28	4	8	0	0
29	0	2	0	0
30	4	1	1	0
31	4	1	1	0
32	4	2	0	2
33	1	6	0	0
34	1	3	1	0

Source: personal elaboration

5. Discussion and conclusions

According to the supporters of the 'modernization' process of the Italian cultural system, the professionalization theme has become the central item of the recent institutional and scientific debates. This theme is related to the process of formal education, coherent with the new institutional perspective and with particular reference to the role of the isomorphic dynamics in the institutionalization process (dissemination) of 'good' and 'new' management practices.

Hence, the role played by Universities and professional training institutions, important centers for the development of organizational norms, is shared by professional managers and their collaborators. The definition of the new professional profile reveals the role played by these actors in the institutionalization process of artistic-cultural heritage' 'managerialization'. The strategic objective of these actors has become the plan for training goals which will be able to make available at the market, as soon as possible, an expert figure of a professional manager.

This implies that the stronger the commitment of the training institutions to the direction of creating professional profiles, the greater the homogenization of capacity and skills possessed by actors trained for the purpose. Therefore, the quicker the process of professionalization of cultural managers, the faster the process of dissemination of new management models.

Therefore, is it consistent to assert that training institutions, first of all public, contribute to the spread of such managerial practices in the field of cultural heritage, thus contributing to the institutionalization of the new regulatory framework in terms of professionalisation of the cultural sector?

Not entering into the merits of the real opportunities offered by the processes of professional training, the research group is currently attempting to give answer to these questions.

From the study emerges, limited to the first results obtained from the analyses conducted on 74 professional masters, the following:

A) *Descriptive Analysis*

- the largest commitment in professional training has been in the Regions of Lazio (28,4% active course) and Lombardia (17,6%). The result from Lazio is due to the high concentration of artistic-cultural heritage in the territory. Moreover, the two regions have a cumulative frequency of 46%;
- the data available regarding the masters' edition show that most of them are a first edition (21,6%) and, just a 5,4%, are at the 8th. However, the lack of information about the editions (47,3%), has not allowed us to read and give an interpretation about the beginning of the courses respectively to the evolution of the regulatory framework;
- the distribution of professional masters by field reveals that Management is the most popular area of studies (45,9%), followed by Humanities (17,6%) and Communication (10,8%).

B) *Content Analysis:*

- the prevalent use of the terms 'Management/gestione' and 'Cultura/culturale/culturali/cultural' has allowed us to hypothesize the educational content, connecting them to 'good' economic and managerial practices. On the other hand, the 'label' may configure the so-called 'window dressing' in which the real contents are not contextualized in the cultural sector. This condition creates a mismatch between the declared and realized educational objectives (decoupling). This aspect could be further confirmed by the repetition of the same codes with respect to the content of a master's brochure, by definition 'window' of educational content;
- tables 6 and 7 show an interesting characteristic of the managerialization process promoted by universities, that is a clear intention to emphasize the qualifying nature of the educational offer. The Managerializzazione/ managerialization/etc. code is used in 60% of the brochure, even in the masters not belonging to the economic area. Finally, must be noted that about 40% of the brochures refer to a process of certification of the skills acquired.

The group is aware of the research limitations but believes that these results can already orient the reader towards the ideas proposed in the early stages of this work. The research group wishes for an extended time of work aimed at developing a longitudinal analysis of processes of formation, to verify the commitment, over time, of Italian universities to the process of dissemination of managerial practices in the field of cultural heritage. Later on, this commitment will be related to the mutations that have covered the regulatory framework related to the cultural heritage sector.

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Towards a perfect learning process - where is Sweden?¹

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Abstract

Purpose of the paper: Competition gets tougher with globalization. Information and knowledge are shared like never before, putting pressure on businesses and nations to provide effective and efficient means of learning. Learning could be seen as the educational process from the user perspective. How could a perfect learning process look when based on process theory and how does reality compare with this? One option is defining a perfect process as doing the right thing based on stakeholder needs, doing it in the right way by minimising resource use and by being adaptable.

Methodology: Applying the proposed educational process on Swedish HEI educational processes indicates that the model can be used.

Findings: The results from the study indicate that Sweden seems to perform well in many areas but also that there are important areas of improvement, such as lifelong learning and the integration of sustainability into education.

Research limitations: The proposed process has only been partly tested.

Research and managerial implications: The strength of the process approach.

Originality/value of paper: Basic process theory in a new context.

Key words: education; learning; process; stakeholders; sustainability

1. Introduction

Competition is getting tougher with globalization. Information and knowledge are being shared like never before. This puts pressure on nations and companies to improve learning. The time when almost everybody will have access to the same information is approaching. In this not so distant future, the countries and companies that make full use of their human capital in the best way will have an important competitive edge. Ideally, every individual will learn what he or she needs to as efficiently as possible over his or her lifetime. With expected working careers spanning some 40 years there will be a need for substantial additional learning and relearning throughout a person's working career - i.e., lifelong learning.

There are many improvement philosophies that could support in improving educational processes. One of these is Lean Management, originating from Toyota and the car manufacturing sector, which has become popular in many other fields such as health care (Mazzocato

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et al., 2010). However, there still seem to be few applications of Lean Management within learning (Anthony *et al.*, 2012). Isaksson *et al.*, (2015a) discuss “lean lifelong learning” by focusing on how it could be applied in distance education. When applying a Lean approach with waste reduction it becomes apparent that Lean might be more focused on improving existing processes than on creating new and more customised products. Isaksson *et al.*, (2015a) observe that customer need based issues such as access to courses, availability of courses and their level are more related to the educational product than to how courses are delivered. The Lean approach, using seven types of waste, does not seem to cover these aspects (Liker, 2004). Going back to basic process theory could therefore help in identifying the elements of a perfect learning process.

We focus on learning and educational processes in Higher Education Institutions (HEI). The learning process could be defined as the educational process seen from the learner perspective. The educational process would then be the act of providing knowledge and would be the producer perspective, where the producer could be a public or private organisation.

Change in society should also change what and how universities are educating. Rapid change in society requires adaptable educational processes. Along with the many existing threats to global sustainability, e.g. global warming, there is an increasing understanding that business as usual is not an option (WBCSD, 2010). Isaksson and Johnson (2013, p. 3691) state that: “Those graduating today are those that will have to deal with all the challenges of sustainability. It could be expected that universities take a leading role in the promotion of sustainable development”. This makes the university approach to the requirements of sustainable development a good area of testing adaptability. We use the expressions “sustainability” and “sustainable development” interchangeably.

The first objective of our paper is to propose how a generic perfect process that highlights critical elements, could look. The second and main objective is to propose a framework for a perfect educational process. The third objective is to apply the model to highlight the situation in Sweden.

2. Methodology

The method for the first objective is based on reviewing basic process theory. Egnell (1996) argues, based on Harrington (1991) and Melan (1992), that process management should maintain an overall perspective and identifies three properties for all processes: quality, efficiency and adaptability. Quality is defined as satisfying customer needs, efficiency as process utilisation and adaptability as how well processes are adapted to new conditions. This is taken as a basis for further discussions on the issue of the perfect process. We review the right thing of the perfect process based on a stakeholder discussion where the main identified stakeholders are People and Planet (Isaksson *et al.*, 2015b). The right thing is seen as the perfect value flow with zero costs due to poor quality. Adaptability is interpreted as the continuous change of the product and value flows to ensure that the right thing is produced in the right way over time. The

result is a proposed perfect process that does the right thing in the right way over time.

The second objective is achieved by adapting the proposed general process to educational processes based on identifying main stakeholders and main stakeholder needs.

The third objective of testing the educational process model is carried out using Sweden as a case study. The reason for this choice is mainly based on the facility of access to national information through the website Studera (2015). Additionally, Sweden is an OECD country with high rankings within economic, environmental and social dimensions (Isaksson and Johnson, 2013). Any detected improvement potential could therefore be relevant to most countries in the world. We study the educational processes following secondary school and throughout a person's remaining lifetime.

For the aspect of doing the right thing we analyse the overall information available in Studera (2015). For the aspect of doing the thing right we additionally study a sub-set of the database by looking at distance courses for sustainability. For the aspect of adaptability we study data from six chosen Swedish universities, which are Chalmers, Gothenburg University, Karolinska Institutet, Luleå Technical University, Stockholm School of Economics and Uppsala University. Gothenburg University is identified as a benchmark university in relation to sustainable development in Isaksson and Johnson (2013). Also, Chalmers is known to focus on sustainability. Karolinska Institutet and Stockholm School of Economics are ranked numbers 1 and 2 in Sweden (URANK, 2014) and are benchmarks in this sense. Uppsala University and Luleå Technical University were chosen because of their good access to information. For the aspect of adaptability we used the same data as above with focus on information and how the issue of sustainable development is dealt with. Here we use relevant parts of the data-analysis proposed in Isaksson and Johnson (2013).

3. The Perfect Process

There are many process definitions but they generally have reasonably similar content. Below is a typical one:

A process is a network of activities that are repeated in time, whose objective is to create value to external or internal customers. (Bergman and Klefsjö, 2010, p. 456).

The starting point for the perfect process is based on the ideas of Egnell (1996) assigning properties of quality, efficiency and adaptability to processes. Quality is seen here as doing the right thing for the customer, who is the one that the process delivers value to (Bergman and Klefsjö, 2010). This could be described as the process that does the right thing. This means that the delivered product, defined as any combination of goods and services, is what the customer wants and needs - the perfect product. Efficiency is defined as how well processes utilising resources could be seen as doing the thing in the right way. This could be seen as the waste reduction focus of Lean Management. There is also a link to the cost of poor quality, a concept

which has many definitions. The one used here is: “Cost of poor quality are costs that would disappear if systems, processes, and products were perfect” (Wikipedia, 2015). Since we want to include the perfect product into the perfect process, this would have to be rewritten saying that the perfect process has zero costs of poor quality when it includes the perfect product and value flows, defined as chains of activities. In a perfect process the adaptability is such that products and value flows change continuously, thus reflecting customer needs. This means that the products and value flows become perfect over time. In summary, the perfect process does the right thing in the right way over time. Even if it is unlikely that any perfect process will be found in the real world, defining this process enables the setting of virtual benchmarks.

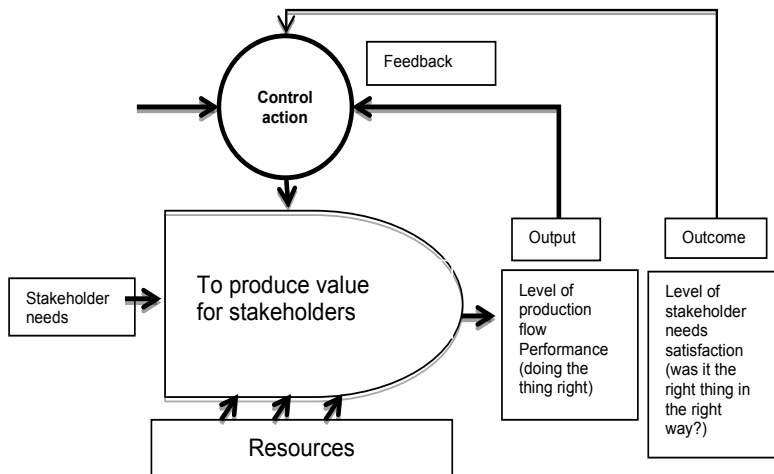
Isaksson (2006, p. 634) proposed a process to be “a network of activities that, by the use of resources, repeatedly converts an input to an output for stakeholders”. This definition extends value creation to all stakeholders, which complicates things, since there will most likely be conflicts of interest. Isaksson (2006) also proposed that processes could be seen as systems. This means that, in the system studied, the perfect process would deliver value to all stakeholders while minimising the use of resources. Seen from the perspective of making best use of the resources in a system it is important to identify all stakeholders and interested parties. To simplify the discussion, the word “stakeholders” is used to refer to everybody having an interest in the system including customers, traditional stakeholders, affected and interested parties, nature and future generations. In order to do the right thing the studied system must comply with the requirements of the outer system it is part of. Isaksson *et al.*, (2015b) argue that, on the global level, there are two principal stakeholders that could be viewed as nature, or Planet, and humanity, or People. In the wake of resource scarcity and with focus on sustainability it could be argued that in any process based system the focus should mainly be on stakeholder needs, with stakeholder wants having second priority. The perfect product, based on this, should therefore be measured in terms of satisfying collective stakeholder needs. However, maximising integrated stakeholder needs is not enough but should be compared with the use of necessary resources. The perfect product would maximise stakeholder satisfaction while minimising resource use in such a way that the performance could be called “sustainable”. Sustainability would mean that the system could continue operating at its current level over time without affecting the future existence of the system at the previous level.

In Figure 1 a model to be used for the perfect process is presented. The output is defined as the measurable result that the process delivers. This could in many cases be measured with typical KPIs for quality, time, cost etc. Stakeholders then assess the output, which leads to a level of needs satisfaction. Here, there is the problem of possible differences between stakeholder needs and stakeholder wants. In a sustainable system the focus is on stakeholder needs. In practical terms, stakeholder wants are the ones guiding decisions. For the process to be adaptable the feedback needs to have an immediate effect on the product and on the value flows delivering the product. These changes take place in what is described as resources in

Figure 1. This could consist of equipment, number of employees, employee competence, culture etc.

In processes described as systems there are many stakeholders, but there should also be a customer that forms the *raison d'être* of the process - a clear customer need that justifies the process. Defining the perfect product in terms of needs could therefore include a review of the main value produced compared to the main harm done (Isaksson *et al.*, 2015b). The right thing could be defined as the specification of a sustainable product. Doing the thing right would then be producing according to the specification with zero defects and deviations. Adaptability requires good feedback from current product and process performance. Additionally there is a need for having perfect input and interpretation from innovations in technology and processes.

Fig. 1: Proposed elements of a perfect process



Source: Own elaboration

3.1 Perfect Learning and Educational HEI Processes - Right thing

The learning process is defined based on a user perspective. The educational process is defined as the organisation of learning for the fulfilment of individual knowledge needs. In higher education, the owner of this process is generally a public or private organisation. The individual could be seen as the main customer of learning. Learning could be a reason in itself, as could be getting a good education, which could be described using the German word *Bildung*. Only striving for *Bildung* was probably more common in the past, when higher education was mainly for nobility. In modern times, most students are striving for employability. This means that one important customer is the future employer. States are also important customers and could be seen as looking for good citizens and good taxpayers. In any country high unemployment is a problem, which means that employability is an important outcome of education. Profit and

generated taxes should be based on good use of resources in relation to the main stakeholders Planet and People.

Using a Pareto approach, the main stakeholders that have been identified for national learning and educational processes are HEIs, students, employers, State, Planet and People. In Table 1, the identified stakeholders have been listed and compared with their assessed needs. The authors then estimated the strength of the needs for different stakeholders. This is mainly done to exemplify the proposed work method. The identified and assessed stakeholder needs are not exhaustive but have been limited to those deemed most important. Stakeholder needs which have not been included in Table 1 and apply for young students, are moving from home and joining student life.

Tab. 1: Assessed stakeholder needs and proposed normatively based relative strength (x= low; xxx=high)

Stakeholder	Need Common education "Bildung"	Employability	Profit/ payback on education	Understanding sustainability	Comments
HEI	x	xxx	x	xxx	Most HEIs are interested in a high ranking, which means having many applying students. Interest in profit varies. Here, it is argued that the focus should be on employability and understanding sustainability.
Sec. School student	x	xxx	xx	xxx	Students are mainly assessed to be interested in employment, but there are also social elements and educational needs.
Mature student	xx	xx	x	xxx	Mature students often have a job and study out of interest.
Employer	x	xxx	xxx	xxx	Employers are probably mostly interested in getting good value out of employees. Here, it is argued that the focus should also be on understanding sustainability.
State	x	xxx	xx	xxx	The State is expecting taxpayers but also well functioning citizens and should also worry about how sustainability is assured.
Planet	xx	xxx		xxx	Understanding planetary boundaries as common education should improve care for the planet. Citizens that are also employed have more influence.
People	xx	xxx		xxx	Understanding social issues will help focus on People.

Source: Own elaboration

The ratings in Table 1 are set based on assessed needs from a normative point of view. These ratings should be further discussed. The purpose here is to demonstrate how to identify main indicators for the right thing. The content of Bildung is often discussed. In some cases the content is related to understanding sustainability, which should promote sustainability.

Tab. 2: Assessed stakeholder harm for the values of employability and understanding sustainability (x= low; xxx=high)

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Harm Stakeholder	Cost	Time	Carbon footprint	Social justice	Comments
HEI	xxx	xx	x	xx	Cost of the educational process needs to be controlled and throughput time should not be too long. Carbon footprint from HEI is relatively low. Recruiting of students should be fair and not based on payment ability.
Sec. school Students	xxx	xx	x		Main sacrifice is cost and time for education.
Mature student	xx	xxx	x		Mature students often have a job and study out of interest.
Employer	xx	x			Employers are interested in benefitting from talent without having to pay a fortune.
State	xxx	xx	x	xxx	The State has limited resources to support education. Many countries have a political interest in seeing that students are extensively recruited.
Planet			x		Carbon footprint of education is limited
People	xxx			xxx	Cost of education and ways of entering HEI are important People issues.

Source: Own elaboration

There are some difficulties in assessing the level of *Bildung* and in assessing its value. In the end only the student can make an assessment of the perceived value. From a needs perspective it could be argued that if *Bildung* is of any value it should positively affect employability. That is, being educated should be something that other people can see and appreciate. The right thing, based on an interpretation of Table 1, would be employability and understanding sustainability. It could be assumed that even if employers today do not specifically ask for competence in sustainability this could soon become an issue.

The produced values consume resources in the form of costs and time. In Table 2 four harm indicators have been identified and compared with the same stakeholders as those identified in Table 1. The main harm indicators chosen for comparison with value are cost and time of education.

Social justice is important but left out here due to lack of data for operationalization. The right thing in education could, based on the above, be expressed as employability and understanding sustainability compared to the related cost and the time it takes. These relations are exemplified for the stakeholders HEI and student in Table 3.

Tab. 3: Value per harm indicators for student and HEI and proposed benchmarks

Stakeholder	Employability/ price	Employability/ time	Payback on investment	Understanding sustainability/ time	Comments
Student	xxx	xxx	xx	xxx	Benchmarks for the perfect process are 100% employability and 100% understanding sustainability in minimum time and minimum cost to be defined.
HEI	xxx	xxx	xxx	xxx	The same benchmarks should be valid for HEI

Source: Own elaboration

A reasonable student expectation for programs leading to a degree is that there is information on cost, necessary time, chances of employability and expected salary. Sustainable university work could be studied by looking at policies and plans for sustainability. Isaksson and Johnson (2013) propose a set of questions that could be answered with a web page analysis. Three of the questions are: “Easiness of finding information“, “Access to and relevance of policy on sustainable development” and “Overall management of SD”. The logic is that it should be easy for the interested student to see how the university is working with sustainable development.

The assessment of three questions has been adapted for Table 4 together with other issues that have been assessed with a scale ranging from 1 to 5, with 5 being the benchmark.

Tab. 4: Proposed criteria for testing information on important issues describing the right thing on a program level

Level	1	2	3	4	5
<i>Cost of fees US\$/year</i>	>20000	10000-20000	5000-10000	0-5000	Free of charge
<i>Necessary time in years to finalise</i>	>5	4-5	3-5	2-5	Customized
<i>Information on employability</i>	No information	Some	For about half the programs	For most programs	For all programs
<i>Employability</i>	Very low	Low	Medium	High	Guaranteed
<i>Information on salary</i>	No information	Some	For about half the programs	For most programs	For all programs
<i>Salary</i>	Very low	Low	Medium	High	Very high
<i>Understanding sustainability - information</i>	No information found	Some information, which is hard to find	Sustainability is mentioned in various documents	There is a clear logic from policy to plans and follow up	It is clear how the university works with sustainability and that this is in focus
<i>Understanding sustainability - policy</i>	No policy found	Policy as part of environ-mental focus	Policy with focus on sustainable development	Policy with focus on sust. dev. explaining definitions	Policy for sust. dev. explaining definitions in relation to the Triple Bottom Line
<i>Understanding sustainability - education</i>	No information or no courses in sustainability	Minimal focus on sustainability education	Basic sustainability course	In addition to basic course, sustainability is part of several topics	Sustainability is taught in detail and forms part of every topic
<i>Availability of education (right thing)</i>	No programs on distance	Few programs on distance	Some programs on distance	Many programs on distance	All programs on distance

Source: Own elaboration

3.2 The Perfect Learning and Educational HEI Processes - Right way

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The perfect educational product, seen from the student perspective (learning) and from the HEI perspective (educating), needs to be defined in further detail as an input for doing this the right way. However, with the above indications, it is already possible to visualise important indicators and benchmarks. Isaksson *et al.*, (2013) suggest that the following Lean waste categories are suitable for assessing learning and educational processes: inventory, waiting, over-production and defects. Inventory is defined as frontloading of learning, meaning that knowledge is accumulated long before it is needed. The risk here is that the knowledge inventory will degrade considerably. Theoretically, just-in-time learning would be better. Waiting could be a major waste issue from the learner perspective. Isaksson *et al.*, (2013) assess, based on examples from Swedish university education, that about 90% of the total process time - from the need's establishment to the use of knowledge - could be wasted. The most important waste consists in waiting for courses to start. Over-production is characterised as education that does not lead to employment. This issue is more related to doing the right thing. Defects represented by students who do not finalize their course or program. Here, course throughput is a good KPI.

Isaksson *et al.*, (2015a) combine a Lean perspective on distance education with a focus on customer needs. They propose a test with five questions with Lean waste categories in brackets:

1. Existence: Does the required educational product exist?
2. Extent: Is the extent of it as required (overproduction)?
3. Availability: Is it possible to enter the education in a planned way? The course could exist but not be available due to overbooking.
4. Waiting: When can the education be accessed (waiting)?
5. Pace: Is it possible to adapt the speed of learning (over-processing, waiting)?

The Existence of a course relates to doing the right thing - have producers responded to the demand? Similarly, Extent is an issue of educational design, which could lead to overproduction. In Sweden the size of courses is often standardised and the minimum size in many universities corresponds to some 130-200 hours of student work. For somebody working and needing an introduction in Lean the extent could, in many cases, be excessive, leading to overproduction compared to needs. Also, Availability could be seen as an issue related to the right thing. Isaksson *et al.*, (2015a) demonstrate that the chances to enter many distance courses in Sweden are low, which makes educational planning very difficult for mature students. Waiting is a major issue for doing the thing right. Another problem with lack of customisation is the pace of learning and the available period.

Within the field of distance education there is a commonly agreed definition of the ultimate distance education as being place and time independent. With focus on defining benchmarks we could claim that the best way of realizing everybody's learning potential for all education would be to be able to start at any time and follow any speed, including intermittent learning, from an individual level to an individual target.

From a theoretical point of view, mass customisation of education could be a way to reduce waste. From the student learning process perspective, the Lean “one-piece flow” could be very attractive for maximising learning value per time. In order to maximise the rate of learning the way of learning should be individualized. Executing the learning process in the right way should start with employer requirements followed by an education based on a just-in-time approach where knowledge needs drive education and where there is minimal frontloading of knowledge. The criteria for assessing the level of doing the right thing and doing it right are presented in Table 5. Table 5 is based on Isaksson *et al.*, (2015a) with the addition of the *Customised pedagogy level*. *The assessment is intended for all types of courses and not only on distance courses as in the original version.*

The proliferation of Massive Open Online Courses (MOOCs) presents more and more courses openly on distance. In the spirit of MOOCs it could be foreseeable that an increasing number of courses will be provided for free on the net. Isaksson *et al.*, (2015a) checked some of the leading MOOC-providers, i.e. Coursera, Udacity and edX for quality courses. A check using the word “sustainability” in June 2015, revealed that Coursera offers 20 courses, three of which are self-paced and can be started at any time. For edX 31 courses were found, 3 of which are self-paced. There were no hits on Udacity. Courses are mostly free of charge but they could offer a verified certificate for about 50 US\$. This highlights the existing technical opportunities and the competition that traditional university courses will be facing in the future.

Tab. 5: Proposed criteria for doing the right thing and doing the thing right based on course level Isaksson et al., (2015a)

Level	1	2	3	4	5
<i>Existence</i>	No courses found	Some courses	Some courses at different levels	Many courses at different levels	Many relevant courses at many different levels
<i>Existence of distance courses</i>	No courses found	Few courses	Some courses	Many courses	All
<i>Existence of distance courses in sustainability</i>	No courses found	Few courses	Some courses	Many courses	All
<i>Extent (right thing)</i>	Courses of one extent only	Some variation in extent	Variation in extent	Some courses in the entire range from 1-30 ECTS	Several courses ranging from 1 ECTS and up
<i>Availability (right thing)</i>	Very hard to access, > 5 appl./place	Difficult to access 2-5 appl./place	Medium difficulty of access <2 appl./place	Good access; <1 applicant/place	Guaranteed access
<i>Waiting (right way)</i>	Waiting > 6 months	3-6 months	1-3 months	<1 month	Course can be started immediately
<i>Pace (right way)</i>	Courses with one pace only	Courses with some variation in pace	Courses ranging from 25-100%	Courses ranging from 10-100%	Many courses that are self-paced
<i>Customized pedagogy (right way)</i>	No customization of learning	Some limited customization of parts of the course	Some customization of parts of the course	Customization of most parts of the course	Fully customized to learning preferences

Source: Own elaboration

3.3 Being adaptable with course content and delivery

Both output and outcome need to be monitored over time to assess the level of cost of poor quality. In order to be able to follow up performance over time, good processes are needed for their feedback from output and outcome as well as from relevant innovations, as demonstrated in Figure 1.

Tab. 6: Proposed criteria for testing adaptability

Level	1	2	3	4	5
<i>Alumni satisfaction measurement</i>	No measurement	Mentioned	Some measurements	Results with target	Results on target
<i>Employer satisfaction</i>	No measurement	Mentioned	Some measurements	Results with target	Results on target
<i>Last change in course syllabus – years</i>	>5	3-5	2-3	1-2	<1
<i>Minimum time for changing courses syllabus – months</i>	>12	8-12	4-8	1-4	<1
<i>Sustainable development in yearly report</i>	Report not found or no mention of sd	Mentioned in a relevant way at least five times	Website information on sustainable development	No information	Well ex-plained (links from start page)
<i>Changes towards sustainability based on yearly report and website information</i>	No information	Some information on sustainability performance	Defined indicators for sustainability are reported	Defined and relevant indicators for sustainability are reported with trends	Clear progress towards goals based on global system limits

Source: Own elaboration

The output gives information on throughput, learning results and student satisfaction. Most indicators at this level will relate to doing things right. The outcome or stakeholder satisfaction could be based on alumni and employer satisfaction surveys. For innovations within the scope of taught topics, lecturers are responsible for knowledge management. An issue where responsibilities are not as clear could be the introduction of modern technology affecting pedagogy. Changes in studying could be carried out based on results by means of output and outcome, but also by studying changes in control documents such as program plans and course syllabi. In a further step how quickly courses and programs can be changed when following ordinary routines could also be studied. In a world where a new product is invented in January, goes global in April and is obsolete by November taking more than a year to change a course syllabus could be a problem. Theoretically, the syllabus should provide information both on the course's content and on how learning takes place. This means that course syllabi could be used as one way to assess adaptability. Adaptability to sustainability requirements could be assessed based on reported results. The yearly report could be used to assess reported changes towards increased sustainability. A university with a focus on sustainability should also report results on the web page, thus ensuring good visibility.

4. Swedish Case Study

In Sweden, all university education for Swedes and members of the European Union is free of charge. This means that the cost of education is related to the time that is needed to complete the program.

Tab. 7: Swedish program education in HEI

	Programs	Distance programs	Part time 50% or less of all progs	Part time 50% or less distance	Programs on sustain. devel.	Comments
All	3882	366 (9%)	268 (7%)	155 (4%)	73 (2%)	Pace is 25-50%; Several of the sd-programs seem to be traditional programs
Chalmers	125	0	0	0	12 (10%)	3 of the programs include the word “sustainable”
Stockholm School of Economics	8	0	0	0	0	
Gothenburg University	495	9 (2%)	9	9	9 (1%)	
Karolinska Institutet	55	14 (25%)	14	12	0	Several one year specialist distance courses for nurses
Luleå University of Technology	172	24 (14%)	4	4	1 (1%)	Engineering program – the word “sustainable” is not part of the name
Uppsala University	246	8 (3%)	13	2	9 (4%)	None of the programs include the word “sustainable”

Source: Studera (2015). Swedish Council for Higher Education, available at: <http://studera.nu/startpage/>, accessed July 8, 2015.

Studera (2015) lists 40 HEIs compared to the 28 found in the ranking list for Swedish universities (URANK, 2014). The difference is made up of special institutions such as those focusing dance, art and sports. Swedish universities have about 90 000 new students every year (UKA, 2015). Studera (2015) also provided some information on employability and salaries for certain chosen professions. In total, 92 different professions are mentioned. There is a prognosis for access to jobs within 5 years based on three levels (difficult, medium and easy). For 21 professions this assessment is missing. There is also information on starting salaries and salaries based on experience that is divided between men and women within the state,

municipality and private sectors. For 27 professions the salary information is missing. In Table 7 some basic data are presented. Using the information from Table 7 and other information from the Studera (2015) helps us fill in some requested information in the Table 4 template. Results from Table 8 show that Sweden has an attractive educational system, which is free of charge and often leads to well-paid employment.

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Tab. 8: Testing parts of Table 4 in Swedish education

Level	1	2	3	4	5
Cost of fees US\$/ year	>20000	10000-20000	5000-10000	0-5000	<i>Free of charge</i>
Necessary time in years to finalize	>5	4-5	3-5	2-5	Customized
Information on employability	No information	Some	<i>For about half the programs</i>	For most programs	For all programs
Employability	28% (<i>hard</i>)		25% (<i>medium</i>)	48% (<i>easy</i>)	
Information on salary	No information	Some	<i>For about half the programs</i>	For most programs	For all programs
Salary (relative OECD)	Very low	Low	<i>Medium</i>	<i>High</i>	Very high
Understanding sustainability – education program level	No information or no program in sustainability	<i>Minimal focus on sustainability programs (2%)</i>	Some sustainability programs	Many sustainability programs	All programs have some sustainability content
Availability of education (right thing)	No distance programs	<i>Few distance programs (9%)</i>	Some distance programs	Many distance programs	All distance programs

Source: Own elaboration. The proposed results are in italics

In Sweden there has been a university law since 2006 that requires all HEIs to work with sustainable development (UL, 2006). With reference to this the result, with 2% of all programs mentioning sustainable development, is low. Many of the programs that are mentioned when searching for sustainable development have another focus and do not mention sustainable development in the program title. Availability for mature students is low when measuring part time distance programs, which is 4% of the total number of programs.

Doing the right thing is based on national data from all universities and on data from six chosen universities. The results are found in Table 9. These are further interpreted using the Table 5 template. The results of this are presented in Table 10.

Tab. 9: Swedish courses in HEI, (Studera, 2015)

	Courses	Distance courses	Part time 50% or less distance	Courses on sustain. devel. all	Courses on sustain. devel. distance	Comments
All	15439	3713 (24%)	3282 (21%)	153 (1%)	40 (0.3%)	
Chalmers	No results					Focus on programs
Stockholm School of Economics	No results					Focus on programs
Gothenburg University	1094	148 (14%)	124 (11%)	12 (1%)	2 (0.2%)	
Karolinska Institutet	55	17 (31%)	17 (31%)	0	0	Most programs
Luleå University of Technology	746	156 (21%)	144 (19%)	7(1%)	5 (0.7%)	
Uppsala University	2016	364 (18%)	347 (17%)	33 (2%)	7 (0.3%)	

Source: Studera (2015). Swedish Council for Higher Education, available at: <http://studera.nu/startpage/>, accessed July 8, 2015.

The average availability of distance courses on the national level is relatively high, with 24% of all courses. However, not all universities provide separate courses, but instead only provide programs, as in the case of Chalmers and the Stockholm School of Economics. Studying sustainable development on distance as part of lifelong learning is difficult. The number of distance courses is low.

Only selected parts of the assessment in Table 10 have been carried out. Numerous courses on different levels are found. The course extent has been reviewed by randomly viewing a sample of some 500 courses in Studera (2015). More than 50% of these were 7.5 ECTS, which corresponds to about 200 study hours. The shortest courses with any frequency noted are 5 ECTS, or some 130 hours. Compared to the need for lifelong learning this extent could be too much.

The results for waiting are based on how the application system in Sweden works. Applications can only be handed in twice a year, April 15 and October 15, as the deadlines to attend courses starting in September and January, respectively. This means that the average amount of waiting time depends on when the need for education is perceived. Therefore, the shortest amount of time from the application to the beginning of the course is about 3 months and the longest 10 months. Some universities leave the application open after the deadlines when places are available. This shortens the waiting time.

Tab. 10: Course based results with the structure of Table 5 and results from Table 9.

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Level	1	2	3	4	5
<i>Existence - all courses (course at appropriate level) - indicative only</i>	No courses found	Some courses	Some courses at different levels	<i>Many courses at different levels</i>	Many relevant courses at many different levels
<i>Existence of distance courses</i>	No courses found	Few courses	<i>Some courses (24%)</i>	Many courses	All
<i>Existence of distance courses in sustainability</i>	No courses found	<i>Few courses (0.3%)</i>	Some courses	Many courses	All
<i>Extent (right thing)</i>	Courses of one extent only	<i>Some variation in extent</i>	Variation in extent	Some courses in the entire range from 1-30 ECTS	Several courses ranging from 1 ECTS and up
<i>Waiting (right way)</i>	Waiting > 6 months	<i>3-6 months</i>	1-3 months	<1 month	Course can be started immediately
<i>Availability (right thing) - based on Isaksson and Johnson (2013)</i>	Very difficult to access > 5 appl./place	Difficult access 2-5 appl./place	Medium access <2 appl./place	Good access; <1 applicant/place	Guaranteed access
<i>Pace (right way)</i>	Courses with one pace only	Courses with some variation in pace	<i>Courses ranging from 25-100%</i>	Courses ranging from 10-100%	Many courses that are self-paced
<i>Customized pedagogy (right way) - not analysed</i>	No customization of learning	Some limited customization of parts of the course	Some customization of parts of the course	Customization of most parts of the course	Fully customized to learning preferences

Source: Own elaboration. The proposed results are in italics

The results presented for availability are based on Isaksson and Johnson (2013), who noted that while the demand for distance courses has been increasing, its supply has been reduced in Sweden. This trend seems to be continuing.

The results for adaptability are presented in Table 11. In Studera (2015) it is possible to search for the pace of the course. At the aggregated level there are many different paces to choose from. However, this does not mean that the student can choose the pace for a particular course. This aspect has not been studied in detail. The rating for pace is probably lower than indicated in Table 10. The customization of pedagogy criteria has not been studied.

Tab. 11: Adaptability based on structure in Table 6 and review of 6 universities

Level	1	2	3	4	5
Alumni satisfaction	No measurement	Mentioned	Some measurements	Results with target	Results on target
Employer satisfaction	No measurement	Mentioned	Some measurements	Results with target	Results on target
Last change in course syllabus - years	>5	3-5	2-3	1-2 (3.8)	<1
Minimum time for changing course syllabus - months (based on 2 samples only)	>12	8-12	4-8	1-4	<1
SD in yearly report (assessment based on structure from Isaksson and Johnson (2013)) - average	Report not found or no mention of sd			Average (4.3)	Mentioned in a relevant way at least five times
Website info on SD (assessment based on structure from Isaksson and Johnson (2013)) - average	No information			Average (3.8)	Well explained with links from the starting page
Changes towards sustainability based on yearly report and web-site information	No information (1.5)	Some information on sustainability performance (1.5)	Defined indicators for sustainability are reported	Defined, relevant indicators for sustainability are reported with trends	Clear progress towards goals based on global system limits

Source: Own elaboration

The results in Table 6 are only indicative. The main area of improvement should be educational adaptation to sustainability requirements.

5. Discussion

The present paper covers many areas superficially, with the purpose of testing the idea of using process theory to define educational processes in HEIs from a stakeholder perspective. The proposed indicators in Tables 4, 5 and 6 have been partially exemplified. The results are intended as a preliminary demonstration of the practical usability of the concept.

Results indicate that there are good opportunities in making education available for distance students. In Sweden, the educational offering is still focused on campus students, who are mainly young students studying for their degree. The increasing number of mature students will not attend campus courses and would rely on distance courses in most cases. Technically, making all courses available on distance should not be too much of a challenge, thinking of the increasing number of offered MOOCs. A country focusing on realising its talent potential should make studying easy. Provided the political will supports it, it would be easy for Swedish universities to change directives and focus more on lifelong learning. Using

modern technology for net-based learning should enable this with limited additional resources.

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Swedish universities seem to be placing sustainable development high on the agenda, but there are few results on its progress. This could signify that the progress towards increased sustainability is not working as well as it should. Also, there is indication that the process of updating courses is too slow. Changing course syllabi seems to be a very lengthy process that involves a great amount of wasted time.

One issue which has not been studied is related to pace and the possibilities a student has of finishing studies earlier. At the program level this could have an important impact on the interest of taking a degree. The average study year in Sweden is 40 weeks, or 1 600 hours. This means that there could be considerable waste in waiting. In an ideal situation, the student could set the pace of his or her studies and should be able to study for a chosen number of hours per year without taking any long summer breaks. This is currently not possible in the system.

6. Conclusions

The first objective was to propose a framework for a perfect process. The proposed answer for this is based on the idea that every process can be described with doing the right thing, doing it the right way and being adaptable. The right thing in the studied system is defined by the stakeholders in Figure 1. In an ideal situation, priorities are set based on stakeholder needs, which need to be compatible with system limitations set by Planet and People as the main stakeholders. The right way is defined as making the best use of resources by delivering the value that is needed with minimal harm. The adaptable process does the right thing in the right way over time with the help of continuous feedback processes.

The second objective was to propose a framework for a perfect educational process. The proposed answer to this consists of an interpretation of who the main stakeholders are and how stakeholder needs could be expressed in order to establish indicators for this. The proposed indicators are found in Tables 4-6.

The third objective was to demonstrate the application of the proposed educational process model. This is done by applying the identified indicators to Swedish educational processes. The results are presented in Tables 8-10. Results show that Sweden has worked with user information for students such as information on work opportunities and salaries. There is also relatively good information on how universities work with sustainability. The largest improvement potential seems to concern adaptability and improving feedback processes such as getting information from alumni, employers and work with sustainable development.

The conclusion is that the idea of a perfect process could be developed to support improvement of educational processes by applying a customer needs focus in the larger context of stakeholder needs focus. Viewing the learning process from the learner perspective could open up for individualised learning in progress towards mass customisation of education to enable all students to make full use of their potential.

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Implementing clusters for economic development in emerging economies: the luong bamboo sector, Thanh Hoa province, Vietnam¹

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Abstract

Purpose of the paper: Clusters have proven their effectiveness for economic development and have been set throughout the world for a number of decades. More recently, they have been applied in emerging and developing countries to boost their economic performance. Choosing a suitable type of clusters for a typical economic sector, in a specific geographical region with many different issues at stake, including today sustainable development, is a difficult task. Therefore, the purpose of this study is to initially investigate, analyze and select the most suitable and appropriate factors to build up a workable and efficient cluster for emerging economies.

Methodology: Based on existing literature on clusters, analysis of practices in the sector studied and interviews with the different stakeholders have been carried out.

Results: A typical agro-industrial model has been designed. Then, the case study on Luong bamboo production and processing in Thanh Hoa has led to design a specific agro-industrial bamboo cluster.

Limits to research: This study is the first phase of a wider study, which will assess the progress made in the industry after application of the cluster model.

Practical implications: The specific cluster model is helping actors in the industry to improve their practices and performance.

Originality of the paper: This is the only existing study in this field.

Key words: cluster; emerging economies; supply chain management; sustainability; bamboo industry

1. Introduction

The concept of economic cluster is not a recent one. Its origin can be traced back to the 1950s. However, it won its fame in 1990 with the publication of “The competitive advantage of nations” by Michael Porter together with the now well-known “diamond model”. Since that time many scholars, policy-makers and business leaders have worked on this concept, developed it and applied it. Some successful economic clusters have become widely known and used as models, such as the Silicon Valley in California, for electronics and IT, Bangalore in India for IT; Switzerland for watches; Italy for leather

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² Nguyen Ngoc Dung carried out the field research and is the main author of this article.

products, Wall Street in New York City or the City of London for finance (Solvell, 2008).

Originally, economic clusters were set up near transportation routes (rivers, roads, lakes, maritime ports), or natural resources with the availability of skilled workers, benefiting by natural or geographical advantages (Solvell *et al.*, 2003). However, clusters have recently developed near educational or academic centers, research facilities (for innovation), design centers for example in the fashion world and financial centers to tap on intangible resources and facilitate interactions between suppliers and customers.

So today, many governments, policy makers and scholars, especially in emerging economies, advocate the setting-up of clusters as a privileged way of boosting economic performance. Indeed, a number of these clusters have been great successes such as the California wine cluster or the Italian leather fashion cluster (Porter, 1998), the Anji-a bamboo cluster in China (Nilsson, 2013), and the Sinos Valley shoe cluster in Brazil (Nadvi, 1995) for emerging economies. However, success is not guaranteed as the examples of the Kirkos textile and leather cluster or the Gundish Meda textile and garment cluster in Ethiopia show (Ali, 2012). Finding a suitable and economically viable cluster model for a typical sector in a specific region is not a simple task: a cluster model cannot be successfully implemented without some modifications to suit different business environments even in a similar business sector. Therefore, wise choices of appropriate cluster policies from country leaders or policy makers should be carefully made to achieve good economic results while being responsible towards the natural environment and resources.

Therefore, the primary purpose of this paper is to design a general industrial cluster model, then an agro-industrial cluster model for emerging economies and finally a specifically designed agro-industrial cluster model for the Thanh Hoa bamboo sector.

The paper is structured as follows: in a first part, the theoretical background with a literature review will be presented. Then, the different types of clusters will be analyzed and the three models in the context of an emerging economy will be proposed. In a second part, the case of the Luong bamboo sector in Thanh Hoa province in Vietnam will be presented and analyzed.

2. Theoretical background

2.1 Literature Review

A cluster is a group of business entities operating in the same economic field and in a specific region where constituents have strong links with each other and provide a related group of products or services (Ketels, 2008). According to Porter (1998) “clusters are geographic concentrations of interconnected companies and institutions in a particular field”. For Solvell (2003) a cluster “consists of co-located and linked industries, government, academia, finance and institutions for collaboration”. Industrial clusters

connect producers of outputs with suppliers of inputs, buyers, service providers and in some cases, governmental and non-governmental organizations (Ali, 2012). In addition, natural input resources, specialized labor and other services that are available in near-by areas help reduce business costs within clusters. Shorter distances between actors of the cluster also decrease delivery time, transport and storage costs thus increasing business profitability. Due to the geographical proximity, knowledge, technologies and know-how can be easily spilled-over (sometimes through non-institutionalized relationships, such as associations or social networks) and in some cases with the emergence of training and research facilities (Porter, 1990; Solvell, 2008; Ketels, 2003; Ketels and Memedovic, 2008; Ketels *et al.*, 2006). Competition and close proximity lead to higher performance, while closeness permits fast feedback from customers and suppliers (Ketels, 2003). As a result, better products/services are offered at competitive prices and provide a competitive advantage for all stakeholders over similar products/services from outside.

At the beginning, the success of clusters heavily depended on input costs (natural resources or abundant labor force) and location (near a maritime port, a major transportation hub, big conurbations with a large number of customers). Therefore, clusters could enjoy a persistent comparative advantage over time (Porter, 1998). Nowadays although these factors can still be important, they are less decisive determinants for the clusters' competitiveness. Enterprises can compensate disadvantages such as lack of cheap labor, qualified workers and employees or even natural resources by outsourcing, while maintaining a comparative advantage through a more productive use of inputs, which requires regular innovation (Porter, 1998). A striking example is the Apple company, whose products are all designed in California's Silicon Valley with parts produced in Korea, Taiwan and China, finally assembled in China by Foxconn, a Taiwanese company. This also means that a competitive advantage today will be short-lived if it is not continuously revived through innovation. We can mention the examples of Sony and Nokia in the sector of electronics. In the past, Sony took the leading role in consumer electronics with its Trinitron Television set and Walkman and Nokia did likewise with its hard-touch durable cell phone. However, due to the lack of innovation, Sony lost its advantage to more innovative products by Samsung or LG, and, Nokia has disappeared from the mobile phone market, now dominated by Apple and Samsung.

Therefore, innovative ideas or designs are decisive factors for the continued success of an economic cluster and its constituents, but they cannot be generated anywhere; they require an environment that fosters innovation; hence, today the presence of a high concentration of universities, research institutes, laboratories and high-tech zones that spur the innovative process and increase the spillover effects within the cluster.

In addition, an increasing productive use of inputs can be performed through innovation in the management of the supply chain (SCM) and more recently the green management of the supply chain (GSCM). Supply chain management encompasses the whole production process involving all upstream to downstream production activities. Green supply chain management adds concern about the impact on the environment from the

start of the production chain, now including the design of the product till the end of the product's life cycle, recycling and waste treatment included, and about the use of natural resources not only for the present demands, but also for future generations' demands (WCED, 1987). The main purpose of GSCM is then to eliminate or reduce waste (energy, emissions, hazardous liquid, gas or solid chemical wastes) (Lakshimeera and Palanisamy, 2013). Thus, SCM and GSCM create value all along the chain. This notion of value chain and the value system ensuing was first introduced by Porter in 1990: the value chain involves economic actors all along the supply chain from upstream to downstream through all the stages of production. An optimization of costs can be operated at any stage of the value chain thanks to the close cooperation and interactions between the actors improving the global economic performance of the supply chain.

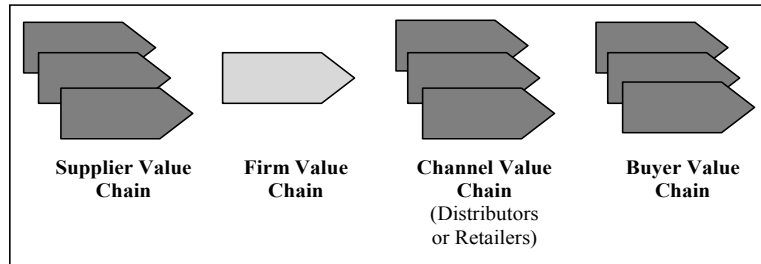


Exhibit 1: Porter's Value system

Source: Porter

A “just-in-time” model (Kanban) in each part of the value chain and globally can significantly streamline the flow of inputs thus reducing purchasing, storage and delivery costs. Inside participating firms a total quality management system helps to reduce lead times and defective products through an effective and efficient use of human and material resources. Such management systems together with the close-knit relationships between actors inside the cluster also contribute to controlling impacts on the environment and facilitate sustainability.

2.2 Types of clusters

Clusters can be divided into 3 main types: “natural clusters”, “government created clusters” and “privately created clusters”.

- 1- Natural clusters, which have been common worldwide for a long time, are based on the presence of resources such as abundant raw materials, market proximity, available workforce for labor-intensive sectors, skilled workers or highly-educated workforce, universities and other research facilities, infrastructure advantages (transportation, communication, etc.), suitable climate, etc. (Ali, M., 2012). Some successful natural clusters are for example High-tech industries of Bangalore in India, Wine clusters in Chile, Sialkot surgical instruments cluster in Pakistan (Ali, M., 2012), and Rheinhessen-Pfalz chemical cluster in Mainz, Germany (Ketels, 2007).

- 2- Government created clusters, which are very popular in planned economies, some developing or emerging countries and even in some developed countries, are created based on governmental long-term projects or state policies (e.g. Kirkos textile and leather cluster in Addis Ababa (Ali, 2012), Thai Nguyen Industrial Park, Dung Quat Economic Zone, Saigon Hi-tech Park and Hoa Lac High-tech Park in Vietnam, Pôles de Compétitivité et d'Excellence in France). Government created clusters are established through deliberate governmental policies such as Industrial Parks, Export Processing Zones and High-Tech Parks for attracting industries to specific areas planned by the government. Another type of government created cluster is a cluster created on the basis of a co-operation between two governments (e.g. Viet-Sing Industrial Parks 1&2: 2 industrial zones set-up based on the Singapore and Vietnam governmental agreements in Binh Duong province, 3 other VSIPs in Bac Ninh, Hai Phong, Quang Ngai provinces and 2 coming VSIPs in Nghe An and Phu Quoc in Vietnam). Thanks to strong support from government(s), clusters of this kind have good infrastructures (roads, power and water supplies, communication system, sewage treatment system, etc.) even at the initial stage and benefit by priority policies from government(s) and provincial authorities.
- 3- Privately created clusters, which have been recently developed in developing or emerging countries, are established mainly based on the financial capital of private investors bringing the technologies, know-how, experience and markets for the products (e.g. Orange City Garment Cluster Private Limited-Vidharbha, India; Phong Phu Industrial Zone created by Phong Phu Industrial Park Company, Vietnam). The cluster developer initiates a cluster by getting land usually by signing a 50 to 70 years' lease contract with the government, provides some infrastructures and then rents out land for investors to build their own production premises or sometimes leases ready-to-use premises. Privately developed clusters may receive some support from the government. A typical characteristic of this kind of cluster is that the cluster does not provide full adequate infrastructure at the initial stage. Infrastructures are timely built based on cluster developers and on newcomer enterprises' demands. However, for the industrial sectors, which cause much pollution such as textile, steel, or chemical industries, a sewage treatment system for the whole cluster must be ready before any investors' investments. Privately created clusters can sometimes be a joint-venture project between private investor(s) and the government (usually through providing land) such as The KwaZulu-Natal Clothing and Textile Cluster (KZN CTC), a Public Private Partnership, a not-for-profit public/private sector, South Africa; Tan Thuan Export Processing Zone, a joint venture project between Tan Thuan Industrial Promotion Co. IPC - representing the Ho Chi Minh City People's Committee (30% stake) and Central Trading & Development Group (CT&D Group) (70% stake); Tan Thuan e-office Park (Tan Thuan IPC and CT&D Group). In that case, private investor(s) usually take the managing role in cluster management.

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Apart from the geographical closeness, which is of course common to the different types of clusters, there are significant differences between the three kinds of clusters (Exhibit 2).

Exhibit 2: Typical characteristics of natural, government created and privately created clusters

Characteristics	Natural clusters	Government - created clusters	Privately - created clusters
Geographical proximity among firms within clusters	Yes	Yes	Yes
Time for cluster formation	Long	Short	Short
Priority and aid from government	Weak	Strong	Weak to average
Spillover effect	Strong	Weak	Weak
Reasons for cluster creation	Natural advantages	Deliberate policies	Business advantages
Significant nearby product markets at the beginning	Available	Few	Few
Cluster life time	Long	Long	Depending on project (normally 50~70 years)
Linkages among firms	Horizontal links	Vertical links	Vertical links or mixed links
Infrastructure (water, power, outer and inner roads, communication, sewage treatment system)	Developed over time	Ready to be used	Developed mainly based on enterprises' demands
Security	Weak	Strong	Strong
Types of enterprises	Small to large enterprises	Mostly large and vertically linked firms	Small to large enterprises
Cluster proprietorship	No	Government entities	Investor(s) or joint-ventures
Pressure on competitive and innovative products	High	High	High
Education & Vocational entities and R&D facilities within clusters	Nearly all or all are present	Vocational and R&D entities; presence of educational facilities but fewer than those in natural clusters	Only training programs; few R&D facilities

Source: authors

Input suppliers and service providers are usually present in natural clusters but not often in government created clusters and privately created clusters. The reason is that these two kinds of clusters are often created to attract large and vertically integrated enterprises, meaning that they do not rely on outputs of other firms as their inputs for production. Therefore, the specialization level and firm linkages are not as high as those in the natural clusters. As a direct result, the spillover effect of technologies, knowledge and know-how, good management practices, etc., a vital factor

for the cluster's advantages, is weak in those two kinds of clusters. However, the pressure for innovative products with competitive prices and quality is present in all kinds of clusters.

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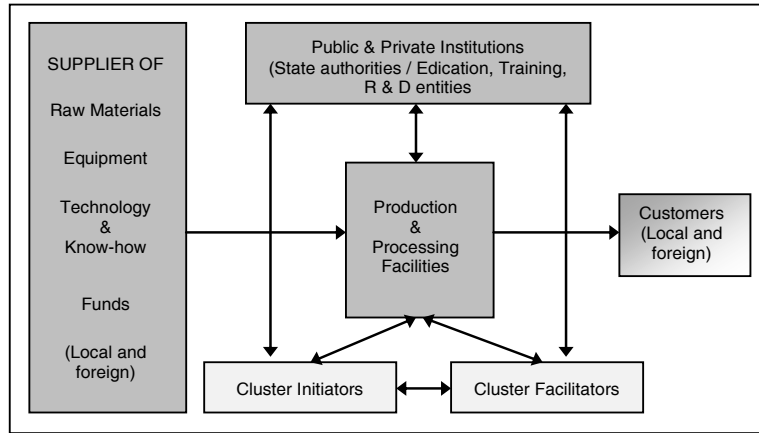
2.3 Cluster Models

Based on Porter's diamond, different cluster models are possible. They can be designed according to the main criterion of business activity, business size, business sector or even stage of economic development of the country. Hence finding an appropriate cluster model for a business sector is not an easy task as a successful cluster model in one country can be a failure in another country. That is the reason why it is necessary to design a model integrating the specific economic and business environment and culture.

In the context of an emerging economy where, by definition, we start from scratch, we need to build a model making the very existence of the cluster possible. An explicit will to create a cluster is required. Therefore, not only will we find government created or privately created clusters, but also the presence of cluster initiators and cluster facilitators to make the cluster come to life, which is the main specific characteristic of such a cluster. The cluster initiators are the ones that significantly "push" the cluster into operation but initiators are neither the cluster's creators (government-created cluster) nor the cluster's developers (private-created cluster). In other words, initiators can be considered as "starters" of the cluster. Initiators not only kick-start business activities but also attract other business entities to operate in the cluster. The role of initiators is important at the cluster's initial stage especially in developing or emerging countries which have abundant but not exploited resources (natural and/or human). Initiators can be, for example, a business organization or a NGO.

Cluster facilitators are the ones that help business activities operating within the cluster. Facilitators can be governmental entities pursuing favorable policies with adapted regulations such as tax breaks or exemptions, low or no import/export duties, free or low land rents, quotas, etc. Banks and other financial institutions can also be facilitators by granting loans with lower-than-market interest rates, long-term loans with less stringent conditions or even acting as "donors" for some projects in the cluster. In addition, facilitators can be NGOs offering training courses for operators and managers, introducing new production and processing technologies and techniques. NGO facilitators can help to boost the cluster by attracting new investors, finding new related products, both incrementally and radically, and new markets thanks to their economic and social connections and experience. Finally, NGOs as facilitators can help businesses to get loans from banks or financial institutions (e.g GRET Vietnam helped the Song Ma Cooperative in Quan Hoa District-Thanh Hoa Province to get a loan of VND 1,060 million from Oxfarm Hong Kong) (GRET report, 2014). There can also be donors of funds, materials or equipment using the channel of NGOs or State, religious or other associations to help the development of the cluster.

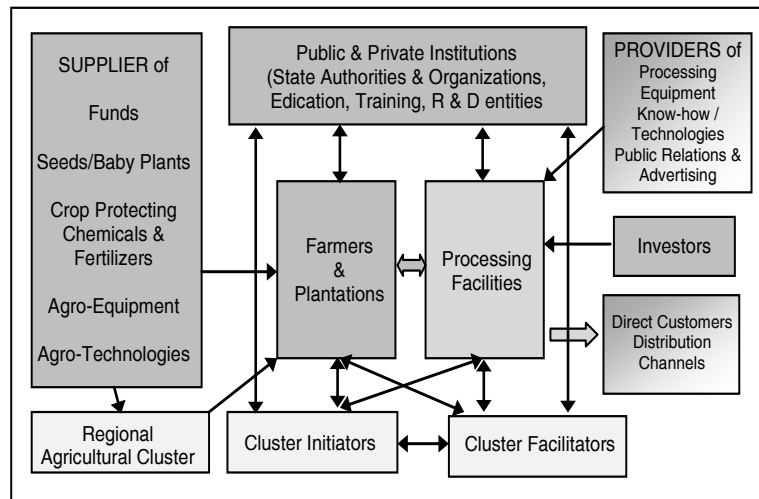
Exhibit 3: Emerging Economy Industrial Cluster Model



Source: Authors

When applying this cluster model for emerging economies to the agro-industrial sector, which in emerging economies will remain, for many years, the main source of work and income for the majority of the population in spite of the rapid growth of the industrial sector and of services, we find some specific characteristics. The providers of supplies directly feeding the agricultural activities and the farmers make up a regional agricultural cluster in themselves. In parallel, there are providers of supplies for the processing facilities (the industrial aspect) who are part of the global cluster. Besides the initiators and facilitators, there are a number of investors in the production processes.

Exhibit 4: Emerging Economy Agro-Industrial Cluster Model



Source: Authors

After the formalization of the general model and the agro-industrial model, we can now examine the case of the Luong Bamboo Sector to apply the model(s) to a particular agro-industrial activity.

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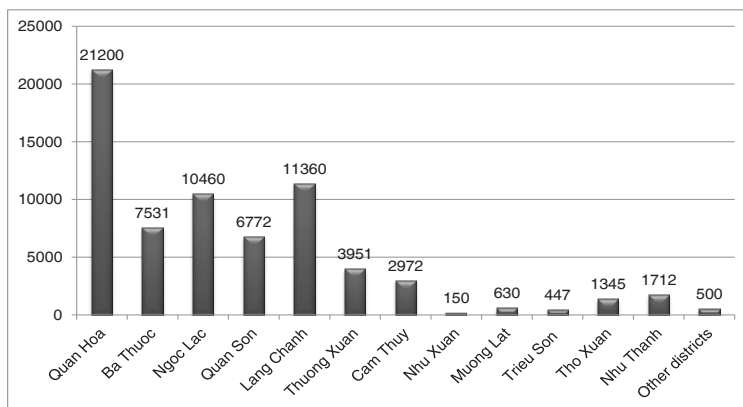
3. The case of luong bamboo sector in Thanh Hoa province

3.1 Profile of luong bamboo sector in Thanh Hoa province

Thanh Hoa Province, located in the Centre North of Vietnam, has an area of 11,136km², a population of 3.491 million inhabitants, with a density of 313/km² and an average GDP per capita of VND 28.9 million (# USD 1,365 in 2014) (*Thanh Hoa Statistics Office, 2014*), 67% of the average Vietnamese GDP per capita of VND 43,402 million (# USD 2,028) (*Viet Nam General Statistics Office, 2014*).

Luong bamboo resources in Thanh Hoa Province are about 251 million culms; annually harvested bamboo culms can reach a figure of 70 million culms/year: an equivalent to 1.75 million tons/year. Current local demand is around 25 million culms/year (*Thanh Hoa Service of Agriculture and Rural Development, 2013*). The Luong bamboo sector with a total area of 69,000 hectares (2006), covering over 55% of total Luong bamboo areas in Vietnam, is located in Nord-West hilly and mountainous districts mainly Quan Hoa, Ba Thuoc, Ngoc Lac, Quan Son, Lang Chanh, Thuong Xuan and Cam Thuy districts. Those districts, which can be considered as the Luong bamboo zone, cover a Luong bamboo area of 64,246 hectares and a population of more than half a million inhabitants.

Exhibit 5: Luong bamboo areas in districts of Thanh Hoa Province



Source: Thanh Hoa Forestry Service, May 2007

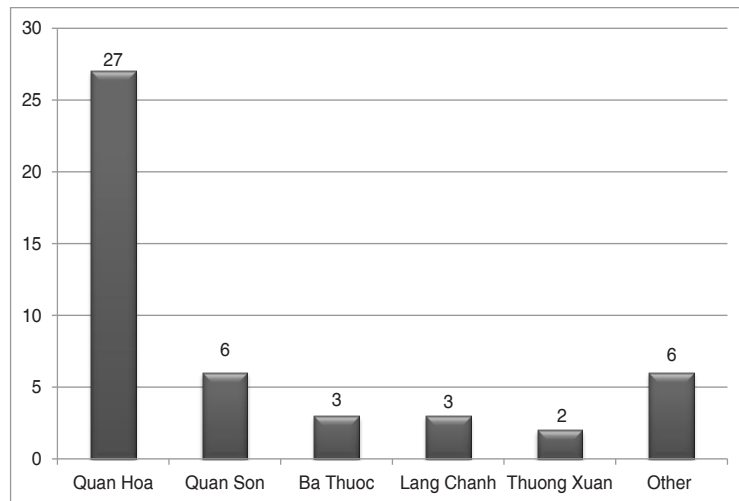
Bamboo plants can be found everywhere in Vietnam from plains to mountainous regions; however, most are used to produce low value added products like utensil products (baskets, chopsticks), furniture (table, chair, bed, mat), doors and windows, thatched cottage frames, construction uses (ladders, scaffolding) or used as food (bamboo shoots). Moreover, bamboo

plantations are scattered, which creates difficulty to collect bamboo culms for a large demand like that from industries. In contrast, the Luong bamboo species is a bamboo species which can be industrially processed with higher value added. Bamboo plants were planted with a high density in Thanh Hoa province in 1960s. Most inhabitants in those districts are 75~85% Thai and Muong minorities (*Thanh Hoa Statistics Office, 2014*) with low education and unskilled resulting in a lower income than other coastal or plain districts of Thanh Hoa province (50% to 57% respectively, *Thanh Hoa Statistics Office, 2014*). Three districts among those districts are among the 62 poorest districts in Vietnam. Each year, the Vietnamese government gives food to support those districts (some thousand tons of rice) in difficult times (1,211 tons of rice in early 2015, *Tuoi Tre newspaper, February 07th 2015*).

Compared to Anji county in China, the most successful bamboo cluster in the world, with 450,000 inhabitants and 57,400 hectares of *Moso-Phyllostachys heterocycla*, a biennial bamboo species, quite similar to the bamboo region in Thanh Hoa, the economic results of the Luong bamboo of Thanh Hoa are much lower, the annual turnover from Moso bamboo products in China being USD 2.03 billion (*Xuan T., China Daily, May 05th, 2013*). We should note, however, that the price of Vietnamese bamboo is about 50% lower than China's and labor costs are a fifth of those in China (ADB, 2006).

According to Patrice Lamballe (LDP Project-GRET), the Luong bamboo annual yield is around 520 culms of Grade A, B and C usable per hectare and they can be harvested from October to April (*An T. BAMPAR Project, 2012*).

Exhibit 6: Number of firms/workshops in districts



Source: Service of Agriculture and Rural Development of Thanh Hoa, September 2013

This shows a high concentration of firms in Quan Hoa district; the district which has the largest resources of Luong bamboo. Therefore, most NGO projects have been carried out in this district.

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3.2 Research Methodology

As shown in the literature review, implementing a cluster model not only for boosting economic results, but also preserving the environment and natural resources, presents a lot of advantages. The literature review was also conducted by examining several case studies and scientific papers related to industrial clusters focusing on those in developing and emerging countries. As stated, our objectives were first to design a typical industrial cluster model based on Porter's Diamond for emerging economies, then develop a model for emerging countries' agro-industries and finally one for Luong bamboo in Thanh Hoa province. Several field-studies were carried out in the concerned areas (mostly north-western districts in Thanh Hoa province and nearby provinces such as Phu Tho, Vinh Phuc and Ha Noi) to understand the current situations and the issues at stake. In addition, a brief study of some successful cluster models especially the successful bamboo Moso cluster in Anji County-China was very helpful for designing an applicable cluster model and then identifying important factors, which could be applicable and economically viable for the Thanh Hoa bamboo sector.

The data gathered for this study were mostly from field studies in several districts in Thanh Hoa province where important bamboo plantations are located and other regions for downstream bamboo products. Primary data and information were collected through 3 types of questionnaires (different questionnaires for farmers, firms and bamboo product traders/sellers) and interviews at sites.

- Questionnaires for workshops were given to managers or owners of bamboo workshops/firms based on the number of firms in the districts: at least 25% of firms operating in one district. Therefore, 7 questionnaires were distributed for Quan Hoa district, 2 for Quan Son, 1 for Ba Thuoc, 1 for Lang Chanh, 1 for Thuong Xuan and finally 1 for Thanh Cong Company in Thanh Hoa city. Each has 24 closed questions and 3 open questions.
- Questionnaires for farmers were given to farmers or bamboo producers based on the surface of bamboo plantations within each district: 1 questionnaire for every 1,000 hectares in the district. Therefore, 21 questionnaires for Quan Hoa district, 8 for Ba Thuoc, 10 for Ngoc Lac, 7 for Quan Son, 11 for Lang Chanh, 4 for Thuong Xuan, and finally 3 for Cam Thuy. Each has 21 closed questions and 2 open questions;
- questionnaires for traders were given to final bamboo product traders, wholesalers, sellers in important wholesale markets in big cities of Vietnam mainly Ho Chi Minh City, Da Nang and Ha Noi. Each has 8 closed questions with 3 sub-tables and 2 open questions.

Direct interviews were carried out with farmers (in case they are illiterate), workshop managers (if possible), bamboo culm traders/collectors, final bamboo product traders and sellers (in case they were not

willing to fill the questionnaire or were busy), cadres of GRET, CRD and HADEVA, and officials of concerned state organizations and authorities. For traders, questions were focused on some questions, namely investment capital, workforces, equipment, turnover, business results in recent years, problems and business outcomes.

Observations, notes, brochures (if available) and photos (if possible) were taken at visits.

In addition, visits at markets, supermarkets, shops in Vietnam and abroad as well as on the internet, etc. were conducted to collect samples and find out bamboo products with their designs and selling prices.

Secondary data were collected from studies of several theses, studies, reports of some NGOs, a big number of cooperatives operating in Thanh Hoa province (GRET Vietnam, HADEVA Vietnam, IFC, CRD, bamboo enterprises, etc.) and studies, reports of some private companies operating outside Thanh Hoa (DVC Vietnam, TBF, Thanh Cong, Duong Thanh Phu companies, etc.). Finally, additional secondary data were also found on websites, Vietnamese newspapers, official data and documents of state organizations and authorities of different levels. Then, all those facts, together with the literature review and lessons from Anji- successful Moso bamboo cluster in China, were used to create an appropriate bamboo cluster model for Thanh Hoa bamboo region.

3.3 Setting-up a bamboo cluster

Findings:

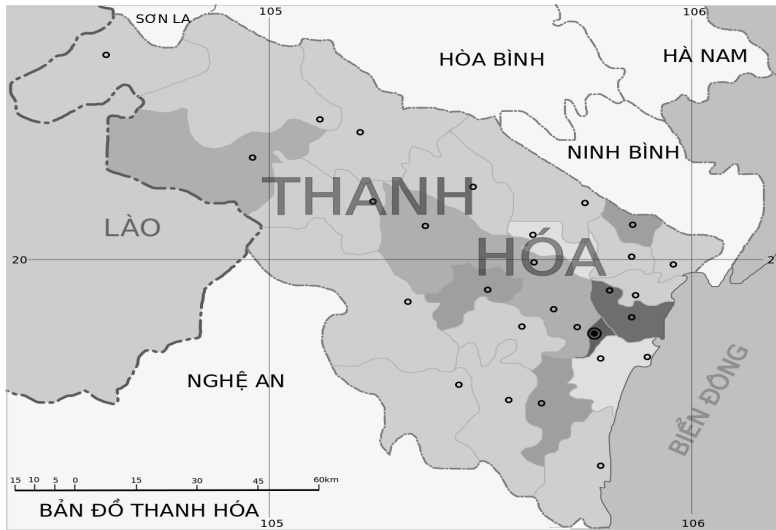
The Thanh Hoa bamboo cluster is at present operational, but at an initial stage, thanks to the help from some NGOs and donors. It is however facing a number of problems hindering its development. Upstream in production, there are the problems of degenerated bamboo species, over exploitation and hard competition from construction demands. Then processing suffers from low quality equipment, high waste, a high percentage of defective products, weak designs, and low-value-added products. Downstream problems concern waste treatment, weak distribution channels, lack of markets for products and hard competition from Chinese products. Therefore, real incentives are needed from facilitators such as State entities (preferential policies and regulations) and investors (preferred foreign investors with high financial capacities, high production technologies, new high-value-added products and new, large foreign markets).

a. Identifying locations:

For bamboo production:

Due to an appropriate climate, humidity, rain fall and soil in North-Western Thanh Hoa districts, bamboo can be planted everywhere in this region including hilly and mountainous areas (up to 35~40° slope), along roads and river banks, and even in front of farmers' houses and in their back yards.

Exhibit 7: Thanh Hoa Bamboo Cluster



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Source: Vietnam Administrative Atlas 2009

For bamboo processing:

An industrial processing of bamboo consumes a very large volume of bamboo culms every day. Therefore, transportation is the most important criterion for choosing an adequate area to establish a concentrated processing zone; scattered processing zones cannot be chosen due to infrastructure difficulties in hilly and mountainous areas. Besides transportation by trucks, simple transportation means (buffalo carts, bicycles, on people's shoulder) and transportation on rafts are popular in this zone. Bamboo rafts floating on Ma, Luong rivers and other small rivers and streams are popular means due to their low cost and suitability in hilly regions where there are no roads or they are muddy in the rainy season. In addition, electrical power, water and labor are also essential criteria for bamboo processing. Finally, the treatment of waste and polluted water can only be set-up in one location because of the high investment required and the control of the treatment.

Taking into account the 4 criteria cited above and after considering the information and data available, Quan Hoa Town and an adjacent area in Ba Thuoc District, where an industrial zone is planned, were chosen for the following reasons:

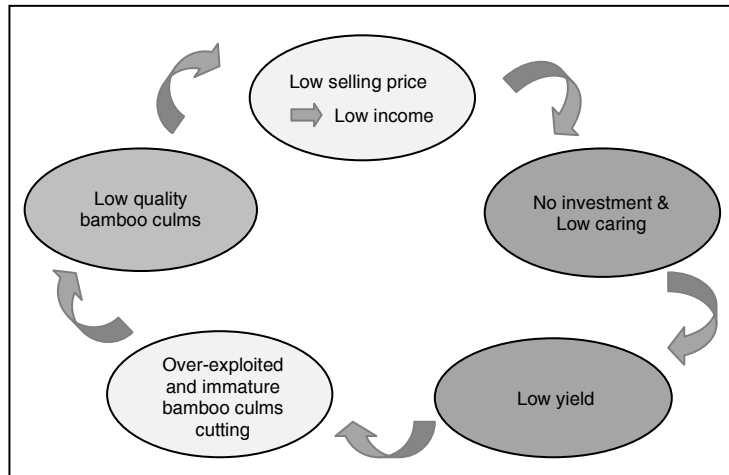
- Quan Hoa Town and an adjacent area in Ba Thuoc are located along National Road 15 and Provincial Road 217: the backbone of the transportation network inside and outside Thanh Hoa province. Besides, it is close to the confluences of Ma, Luong and Nam Niem rivers satisfying all water demands. National Road 15 and Provincial Road 217 are main roads connecting to National Road 1 and the National Railroad (the backbones of Vietnam's transport system); in addition, the newly opened Tho Xuan Airport is an important gate for foreign investors, and Nghi Son Seaport (is) an important port for importing equipment and exporting bamboo products.

- the power grid of Quan Hoa Town and its adjacent area is connected to the National Power grid assuring stable and regular electrical power;
- Quan Hoa district has the largest bamboo resources (21,200 ha) along with its nearby Ba Thuoc District (7,531 ha), Lang Chanh (11,360 ha) and Quan Son (6,772 ha) ensuring a stable supply of bamboo culms with short delivery time for processing. It currently has 27 processing firms; the highest concentration of bamboo processing firms in Thanh Hoa province;
- the adjacent area of Quan Hoa Town has a planned area for an industrial and processing zone;
- Quan Hoa and an adjacent part of Ba Thuoc district have received most concerns from NGOs and investors; most of the development and experimental activities have been conducted in this area.

Other districts within the bamboo cluster can set up processing firms as satellite firms by producing semi-finished products. All semi-finished products and bamboo waste should then be transported to Quan Hoa processing zone for processing final products and waste treatment. Processed bamboo waste varies from 20% to 75%, whereas in China it is just 5% (Renard, 2012). Therefore, there is ample room for improvement.

b. Farmers and plantations:

Exhibit 8: The vicious circle of poor farmer households



Source: Authors

Overexploitation, immature bamboo culms cut for the daily needs of farmers result in low yields and poor quality, providing farmers with a low income and thus creating a vicious circle. To expand bamboo production, farmers need more fertilizers, new high-yield baby plants and training in growing techniques. For all that, they rely on support from NGOs, private investors and entities or the government. Moreover, new plantations do not generate any income for the first four years in which farmers can

only partly compensate for by growing peanuts or cassava. This makes the support of the entities cited above even more essential.

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c. Supporting industries and services:

Results from field-studies have shown that most equipment was made in Thanh Hoa or Ha Noi and some was imported, mainly from China. In order to strengthen the links between economic actors in the cluster, future local equipment manufacturers producing suitable equipment and providing fast maintenance should be established in Quan Hoa processing zone to be near bamboo processing firms.

Bamboo nurseries and experimental plots can be set up anywhere within the cluster, like, for example, the bamboo nurseries and experimental plots established and managed by GRET Vietnam.

d. Financial entities:

Agribank and Bank for Investment and Development in Vietnam (BIDV) have their bank branches in all the districts of the cluster; Vietcombank has only one branch in Thanh Hoa City. In 2012, BIDV Quan Hoa branch granted loans of a total amount of VND 16.7 billion (# USD 750 m) for farmers and firms (GRET report, September 2013).

According to the valid Decree dated April 4, 2010, Vietnamese banks' loans based on business entities are as follows:

Exhibit 9: Vietnamese Banks' loans for business entities

Individuals/agro-forestry farmer households	Agro-forestry traders, agro-forestry service providers	Cooperatives, farm's owners
Max VND 50 million (# USD 2,300)	Max VND 200 million (# USD 9,200)	Max VND 500 million (# USD 23,000)

Source: authors from banks' data

Loans from Vietnamese banks are not adequate for local investors' demands even at a very small scale of business; therefore, outside investors with higher investment capital are essential for boosting the cluster.

e. Education, Training, R&D facilities:

There are some training courses for farmers and managers given by GRET and CRD. Some experiments have been conducted by GRET and Tan Thiet Cooperative on producing mushrooms and semi-active charcoal by TXT from December 2013 to Mars 2014 with positive results (Petit, 2014). There is no Bamboo Faculty in the region but the cluster can cooperate with Ba Thuoc Forestry Company in Ba Thuoc District and Cau Hai Forestry Research Center, a state forestry research center, located in Doan Hung District, Phu Tho Province for R&D experiments on bamboo species.

f. Agro-technologies:

Marking bamboo culms (Neiyu in Chinese and fully applied in Anji), semi-circular platform watering and fertilizing techniques have been conducted by GRET at an experimental scale.

g. Cluster initiators, facilitators and donors:

As defined above, the Thanh Hoa bamboo cluster initiator is GRET with many activities (training, conducting agro-experiments, looking for investors especially foreign investors, helping to establish cooperatives and associations, introducing new agro-techniques, setting-up nurseries, etc.) to kick-start the development of the cluster.

Facilitators: the cluster really needs a cluster processing zone developer to establish a processing zone in an adjacent part of Ba Thuoc District and some foreign investors (e.g. The Bamboo Factory - TBF, a French FDI in Hai Duong Province with a high-tech processing chain producing high-value-added bamboo products for export) with capital, new processing technologies, new equipment and above all new markets for bamboo products. An investor like TBF is a real “pusher” for the development of the whole bamboo cluster. By producing panels and floorings, TBF consumes slats from satellite firms thus generating linkages among firms both vertically (by using slats as inputs) and horizontally. By producing slats the mid-part of bamboo culms is used and the rest can be used for producing chopsticks, paper pulp, etc. by the same firms or sent to other firms for production (horizontal links). Authorities can be considered as facilitators by implementing favorable policies (tax breaks or reductions or low land rents for a certain period for farmers and investors, financial subsidies for exporting products, positive regulations for big projects, etc.). Thanh Hoa State organizations can become cluster facilitators by establishing a Bamboo Faculty, R&D entities in the region or giving training courses on watering, fertilizing, using pesticides and growing techniques with high environmental and natural resources preservation concerns.

Donors: some donors in Thanh Hoa bamboo cluster are Fenetrea Co. (French), Agence Française du Développement (AFD), WorldBank VN, Ford Funds, ADB, German Reconstruction Bank (FKW), etc.

h. Thanh Hoa authorities & State organizations:

According to a Master zoning plan, until 2020 for the industrial/agro sector of Thanh Hoa authorities, there is no plan for setting-up a bamboo processing zone in the concerned districts; this means that a private processing cluster developer is needed for setting-up a concentrated bamboo processing zone in Quan Hoa district or in its adjacent area located in Ba Thuoc district.

The position of Thanh Hoa Province according to the scoring for supporting business activities based on the Provincial Competitiveness Index Vietnam 2014 is the following:

Exhibit 10: Scores for supporting business activities in Thanh Hoa Province over 63 provinces/cities in 2014

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Score: 0-10 (the higher the better); Rank: 1-63 (the lower the better)

Entry Costs	Land Access and Security of Tenure	Time Costs and Regulatory Compliance	Transparency and Access to Information	Informal Charges	Proactivity
8.71	5.79	6.79	6.15	5.32	5.58
Business Support	Labor & Training	Legal Institutions	Provincial Competitiveness Index	Ranking among provinces/cities	Ranking group
5.82	6.3	6.01	60.33	12/63	High

Source: Malesky, 2015

The report is a joint product of the Vietnam Chamber of Commerce and Industry (VCCI) and the US Agency for International Development (USAID/VNCI); the primary author of the research team is Dr. Edmund Malesky, Associate Professor of Political Economy at Duke University. The study was carried out based on surveys of 9,859 private enterprises including 1,491 FDI enterprises operating in 63 provinces and big cities of Vietnam.

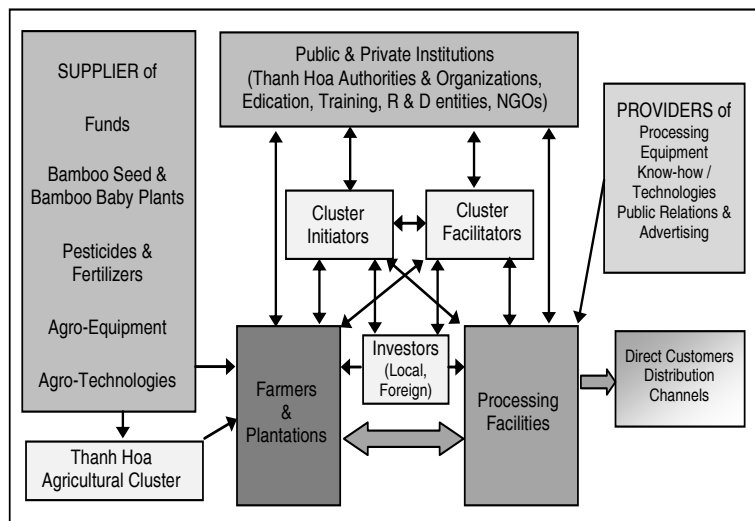
Lessons from Anji county show that success is mostly dependent on government support at the early stage of development (in the 1970s and early 1980s) through subsidized inputs (tax on forest products from 18% to 8% and eventually to 0%), rewarded productivity, active extension services offered and supporting research (Renard, O., 2012). Support for farmers and business entities is weak from the Thanh Hoa Government.

Strong government intervention in bamboo production and exploitation is vital to ensure a reliable supply of good quality bamboo culms and preserve the environment as well as the sustainability of bamboo resources. All are essential for promoting the sector and attracting new investors with sizeable processing plants.

i. Markets for Thanh Hoa bamboo products:

Markets for Thanh Hoa bamboo products are mostly local; there are few entities which can directly export their products, such as Duyet Cuong Company, a FDI Taiwanese company, exporting votive paper to Taiwan and Trieu Son Company, exporting bamboo flooring to Japan. Some finished products, such as single-use chopsticks or semi-detached chopsticks are sold to other companies outside Thanh Hoa and then exported under the brand names of those companies.

Taking into account the aspects contributing to a successful cluster, the model for Thanh Hoa bamboo agro-industrial cluster can be illustrated in this way:



Source: Authors

4. Conclusion

Choosing a location for setting up a cluster is based on the type of cluster: near natural resources for a natural cluster, initiatives based on State policies or long-term projects for a government created cluster and business advantages for a privately created cluster. The role of initiators is paramount to “start” the cluster, especially to attract investors at its early stage. Initiators like NGOs in emerging countries help farmers by offering agricultural training, new techniques, and material aid such as new seeds, fertilizers, and SMEs by giving management training, introducing new equipment, techniques, new investors as well as new markets to improve their business performance. NGOs’ helpful activities, of course, can only be realized thanks to funds from donors. Facilitators are essential, too, to foster and then ensure a steady development of the cluster. Facilitators such as State entities play a key role in supporting the cluster thanks to favorable regional and investment policies, suitable regulations for preserving the environment and natural resources as well as establishing educational and training facilities. In emerging or developing countries, FDI investors are as preferred facilitators and indispensable for boosting up the cluster thanks to their high-tech equipment, know-how, investment capital, potential markets and creation of high value-added products.

Despite having large resources of Luong bamboo, Thanh Hoa inhabitants are still poor; therefore, they really need incentives to develop the bamboo cluster in order to improve their living standard and at the same time preserve their valuable resources and environment. The way to reach a “Full Diamond” (Solvell, 2009) is still ahead with many obstacles

to overcome; therefore, the contributions of all the different actors from farmers, government at different levels to local and foreign investors are required. Finally and above all, the implementation of green supply chain management in any agro-industrial cluster, particularly the Thanh Hoa bamboo cluster, should be strongly encouraged to preserve the environment and natural resources. To do so, strong and persistent government support and intervention in bamboo exploitation and processing are essential and decisive for an enabling environment.

An agro-industrial cluster model as showed above would be helpful for future bamboo project planners, investors, managers and for defining State policies.

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E-tailing as an evolution of the distribution channel in tourism¹

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Abstract

Purpose of the paper: *The paper aims to provide a concrete understanding of the changes that have affected the tourism market. More specifically, the study captures how the structure of industry has transformed and will continue to follow an evolutionary path.*

Methodology: *In order to examine the characteristics and preferences of e-tailing in tourism, we have conducted a quantitative study with a random sample of Italian and American customers.*

Findings: *New companies have entered the market, existing ones have revised their strategies, consumers have become more sophisticated when using the Internet as a tool for doing research and finding affordable deals. The evidence emerging from the analysis performed highlights how technological innovation has changed the relationship between company and customer and the buying behaviour of the latter in the tourism industry.*

Research limits: *The study suffers from a small sample size and a selection process that cannot be representative of the larger population of tourist customers. Hence, the results from the current study cannot be generalized to this wider community.*

Practical implications: *From the results of an online questionnaire, the paper provides empirical evidence of how the tourism industry can improve the virtual world on the basis of its experiences in the real world.*

Originality of the paper: *The value of this paper is to update the available knowledge on the distribution channel in tourism industry taking in consideration the recent evolutions of the structure of travel intermediation.*

Key words: electronic retailing; tourism; e-tourism; distribution channel; communication

1. Introduction

Technological innovation and the evolution of consumption patterns have redesigned and are redesigning the tourism industry. The new tools of information and communication technology are characterized by openness, access and user participation, which tend to reshape the paradigm of the relationship between company and customer and the methods of dialogue between the two actors. A growing number of consumers are using the Internet, mobile devices and social media in their personal and professional lives. At the same time, the growth of online sales offers new

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buying opportunities for customers, who can purchase products/services conveniently at affordable prices, but it also raises new questions for companies on how to structure their marketing strategy effectively.

In healthcare, the integration between communication and technology is giving rise to new forms of interaction between doctor and patient. In the retail industry, the development of social commerce is changing the behavior and buying preferences, favoring a continuous exchange of information between company and customer and amongst consumers themselves. In tourism, the introduction of technological applications allows consumers to glimpse a preview of the experiences they will actually have.

Inspired by literature review and empirical analysis, the paper provides a representation of the new forms of interaction in the tourism industry, benefiting from the integration of the new technological tools that facilitate access to information. The study applies the wider literature in e-tailing and tourism in order to ascertain how the structure of the industry has been transformed and how it will continue to follow an evolutionary path. New companies have entered the market, existing ones have revised their strategies and consumers have become more sophisticated when using the Internet as a tool for doing research and for finding affordable deals. From the results of a questionnaire, the paper provides empirical evidence of how the tourist industry can improve the virtual world on the basis of its experiences in the real world. At the same time, it updates the knowledge available on the distribution channel in the tourism industry taking into consideration the recent evolutions of the structure of travel intermediation.

The article is structured as follows: the first section examines the main theoretical contributions on e-commerce, e-tailing and e-tourism. The second analyzes the results of a questionnaire regarding the impact of the Internet on tourist product retailing and the habits of e-tourism players. Based on the empirical results, the final section identifies the key factors that make new technologies a tool for reducing distribution costs and developing new types of offer for the tourist industry.

The study provides empirical evidence of how the tourist industry could improve and share in the virtual world what it has experienced in the real world. In this context, the paper offers insights into the marketing process of the travel product (e.g. pre- and post-sales, booking) and the management of customer loyalty (e.g. ancillary services).

The value of this paper is to update the knowledge currently available on the distribution channel in the tourism industry taking into consideration the recent evolutions in the structure of travel intermediation.

2. Literature review

2.1 E-commerce and e-tailing: definition and evolution

The interest of scholars in e-commerce arose at the end of the 1980s with the spreading of electronic information systems and the Internet (Bakos, 1991; Malone *et al.*, 1987). What attracted the attention of companies from

the very beginning was the economic potential deriving from factors such as global connectivity, interactivity, flexibility, speed, low costs and ease of access to information (Pyle, 1996; Jones and Vijayasarathy, 1998).

Considering the Internet as a place of information, Bakos (1997) identifies the electronic marketplace as the information system that allows participants, buyers and sellers to exchange information on the market about the prices and the products offered. Apart from the ease of access to information, the other special characteristic of e-commerce lies in the interaction between the parties (Yoo *et al.*, 2010; Blasco-Arcas *et al.*, 2014). Internet cancels the concepts of space and time, becoming a new meeting place for supply and demand that is open 24/7 and allows the market's space-time horizons to be extended.

The spreading of the web and the development of e-commerce are the phenomena that have reshaped and are continuing to reshape companies' marketing strategies. E-commerce on a global level grew by about 20% in 2014, reaching a value of approximately 1,500 billion euros with a billion e-shoppers (European B2C E-commerce Report, 2014). The factors driving such a development are the increase in the frequency of online purchasing, the increase in the number of users with access to the Internet and the spreading and use of mobile devices such as smartphones and tablets.

In this scenario, Europe boasts 264 million e-shoppers for a value of 363.1 billion euros and an average spending per capita of about 1,376 euros. In Italy, e-commerce has reached a quota of 22.3 billion euros with a growth rate of 6% of total sales. The growth rate is supported by the rate of penetration of Internet which has reached 82% and by the increase in the number of users of smartphones (+30%) and tablets (+156%).

The development of the electronic channel has been facilitated by the presence of several advantages both for companies and for consumers. As far as the companies are concerned, the main advantages are fewer barriers to entry, greater efficiency of the production, sales and distribution process, the overcoming of geographical and temporal boundaries, greater interaction with the customer and the possibility to acquire more information regarding buying behavior (Bakos, 1991; Pyle, 1996; Jones and Vijayasarathy, 1998; Foglio, 2010; Sciarelli and Vona, 2000). For the consumer, the benefits deriving from e-commerce are economic advantages, convenience, the availability of information, the customization of the commercial offers, bilateral interaction, the wide choice of products and services (Yoo *et al.*, 2010; Blasco-Arcas *et al.*, 2014).

Defined as the sale or purchase of products and services via the Internet, e-commerce assumes various forms that differ according to the actors participating in the transaction: a) Business to Consumer (B2C) which entails the sale of goods and/or services by the company to the final customer. It represents the most significant quota of the market and includes specialized and generic operators, click and mortar, virtual outlets; b) Business to Business (B2B) which entails the sale of goods and/or services from one company to another; c) Consumer to Consumer (C2C) which entails the sale or the exchange of goods and/or services between private individuals; d) Consumer to Business (C2B) which entails an exchange of information and/or knowledge between private individuals and companies.

In this instance, e-tailing represents a true distribution channel and as such has developed both direct and indirect transactions.

In the direct channel, the producers sell to their buyers through their website thanks to an e-commerce section. The products are displayed as if they were in a shop window with images, information, prices and everything the buyer needs in order to make the purchase. In this case, the manufacturing companies (click and mortars) not only have the possibility to sell directly to their customers, but also to give and receive information. Apart from the sales, the website becomes the place where the customers can acquire all the information necessary in order to do their shopping in the strict sense of the word and where the companies can obtain useful data for sales and marketing purposes.

On the contrary, in the indirect channel, manufacturers sell to their customers via digital distributors which may specialize in one category of commodity or in many products. These online platforms are known as e-marketplaces and represent virtual places of intermediation between supply and demand. On these sites it is possible to receive all the information necessary concerning a product or a service and proceed to purchase it. The experiential dimension of the purchase does not represent an obstacle as it is regained by visiting the sales point before taking the final decision. This purchasing process, known as online/offline/online is one of the principal factors for the growth of e-tailing particularly in the tourism industry.

The e-tailing strategies may differ according to the companies' objectives, but it is the opinion of some scholars that owing to their interactivity, they allow positive effects to be achieved on the relationships with customers (Wang *et al.*, 2002) and on their satisfaction (Yoo *et al.*, 2010). Of particular importance is the ability of the company to create an e-commerce site or to rely on an e-tailer who encourages a biunique communication between the company and the customer and an easy-to-use interface. The possibility of interacting directly with the company or with the opinions of past customers overcomes consumers' mistrust, encouraging them to buy. The same also applies for the ease of understanding the website and the purchasing methods. A topic which is acquiring increasing importance amongst companies is how to improve the user experience on their website in order to eliminate the virtual architectural barriers to the purchase, guaranteeing, as a result, more conversions.

2.2 E-tourism

Sheldon (1997) and Werthner and Klein (1999) stated that Information and Communication Technology (ICT) has revolutionized travel and tourism. Longhi (2008) remarked that tourism is the most important economic sector of the e-commerce channel. Buhalis and Law (2008) wrote a review on the topic of electronic tourism as the application of ICTs on the tourism industry, while Hikkerova (2010) stated that e-tourism produces and distributes tourist products and services through the digitalization of all the activities involved in the value chain of travel and hospitality industries. Xiang *et al.* (2015) defined the tourism product as intangible, experiential, and perishable.

The expanding use of the Internet has radically changed the different stages in the sale of the tourism product as well as the customer service management, by creating “the communication of offers in the pre-sales stage, interactive trade and booking systems in the sales stage, and alterations to bookings, the sale of adjunct services and customer loyalty schemes in the post-sales stage” (Raffour, 2003). At the same time, Internet represents the perfect platform on which tourists can easily and rapidly find all the essential information needed for organizing their travel such as prices, availability, timetable, and customized packages (Antonioli Corigliano and Baggio, 2010). Buhalis and Licata (2002) brought into focus and highlighted the actors involved in these online services: in the e-tailing channel, tourism suppliers (such as airlines, car rental companies and hotels) capitalized on the new opportunities created by ICT and developed websites where users can access their reservation systems directly.

Over the last decades, the tourism distribution agents have been the so-called intermediaries: the traditional offline travel agents, the tour operators and the newborn online travel agencies, which are, indeed, supported by computer reservation systems (CRSs) and global distribution systems (GDSs) (Buhalis and Licata, 2002). The development of the Internet has led to the creation of new fundamental tools for online tourism i.e. the search engines which facilitate travelers’ access to tourism products and services. These latter tools, with the CRSs and the GDSs, are the agents in charge of all the activities of the value chain related to the travel product, especially marketing, distribution and customer services (Xiang *et al.*, 2015).

3. Methodology and results

3.1 Dataset description

In order to examine more closely the role of e-tailing as an evolution of the distribution channel in tourism, we have conducted a quantitative study with a random sample of Italian and American customers. To understand the characteristics and preferences of online customers, the questionnaire was chosen as the best instrument to investigate online tourism purchasing.

Primary data were collected directly through the distribution of an online questionnaire to gather some initial information about consumers’ perceptions of the online distribution channel and online tourism industries. The questionnaire began with questions regarding a broader overview of e-tailing and was based on structured questions about participants’ purchasing habits, their preferences in buying products online rather than in offline stores and their level of satisfaction and of concern regarding online purchasing and paying. Other structured questions were submitted to narrow the study to the online tourism industries, aiming at observing customers’ use of online travel agencies, the use of other search engines, the so-called meta-search engines (e.g. skyscanner.com, kayak.com), their purchase of deals on coupon websites and the way tourists plan their travel: if they use these engines exclusively for the initial travel research and later purchase each service separately in the corresponding companies’ websites

or if they use them for the travel research and then they buy the travel directly there. A couple of questions regard the more recent trends created by the use of social media like blogs and other websites dealing with feedbacks and opinions (e.g. TripAdvisor).

The questionnaire included the measurements of 22 variables. The items of some questions were calculated using a five-point Likert-type scale, with anchors ranging from 1 (the lowest) to 5 (the highest). Some subjective questions were also included in order to compare the answers of people of different nationalities.

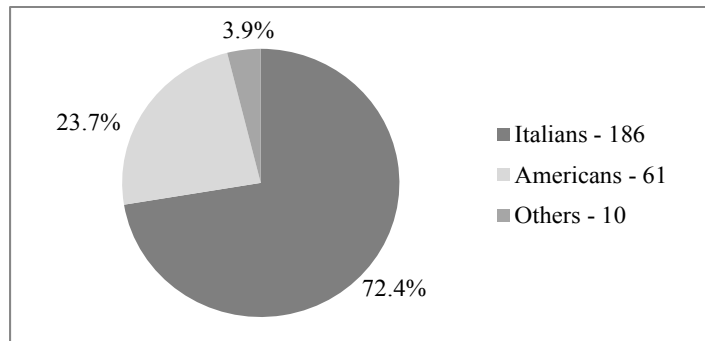
Regarding the sample used in this project, the survey involved 257 participants and was filled in online and 80.7% of the respondents were young people up to the age of 25. According to Buhalis and Law (2008), young people are the main Internet users (up to 90%) in daily life. They grew up in the age of the new media and the use they make of the Web greatly influences online business (Turban *et al.*, 2008).

3.2 Results

3.2.1 General characteristics of the respondent customers

This section explains the background characteristics of the respondents. A total of 257 online consumers participated in this study. Of the respondents, 72.4% (corresponding to 186 respondents) were Italian and 23.7% (corresponding to 61 respondents) were American (Figure 1).

Fig. 1: Gender of the respondent customers

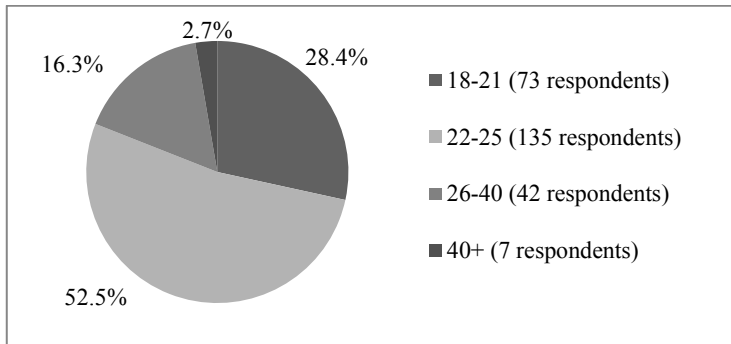


Source: Author's elaboration

In terms of gender, 74.7% (corresponding to 192 respondents) were female and the remaining 25.3% (corresponding to 65 respondents) were male.

As can be seen in Figure 2, the majority of customers (52.5%) ranged from 22 to 25 years in age. In second place, are people aged 18-21 with a frequency of 28.4%, followed by people aged 26-40 with a frequency of 16.3%. A smaller percentage (2.7%) is represented by people aged over 40.

Fig. 2: Age of the respondent customers



Source: Author's elaboration

Concerning online shopping, a far greater majority of respondents (80% corresponding to 204 respondents) usually buys online. On one hand, travel represents the service that is most often bought online: 64.8% of consumers (corresponding to 162 respondents) buy travel and holidays solely online. On the other hand, groceries represent the purchases most often made in store: 93.5% of consumers (corresponding to 230 respondents) are accustomed to in store grocery shopping.

3.2.2 Factors that affect online purchasing and online tourism purchasing

Our research began by interpreting the major factors that drive people to choose online purchasing rather than offline shopping. More than any other factors, both Italian and American customers search for online services as a result of their convenience, availability and broader choice. In a five-point Likert-type scale, respondents perceived “convenience” and “availability” as the most important factors that prompted them to buy online products and services, rating them with five points (highest range). Using the same measurement scale, they considered “security of payment” and “impossibility to check (or try on) products and services” the fundamental drivers that concern them the most while shopping online.

We distributed a subject question, in order to understand the different Italian and American consumer habits in online shopping, asking the respondents which type of goods and services they usually purchase online. American respondents listed books, electronic accessories, handmade crafts, music, clothes and shoes, cosmetics, household goods, sport and concert tickets.

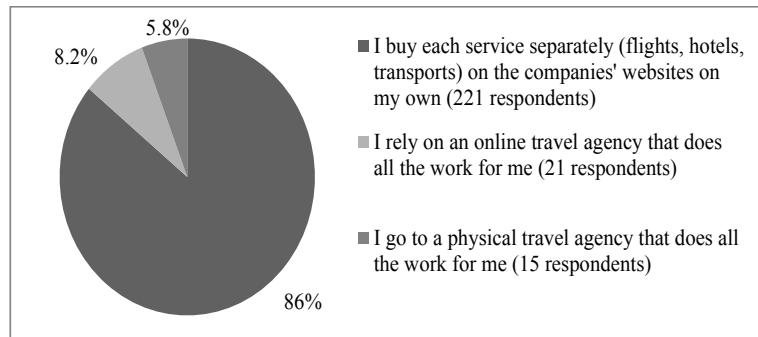
Italians respondents listed jewelry and accessories, event tickets, transport tickets, pet food, mobile apps, coupons and deals, cosmetics, and gadgets (such as phone cases).

Concerning the general characteristics of respondents buying online tourism services, of the total of 257 respondents, the large majority (91.1%) are accustomed to buying hospitality services through the web. Among the reasons for not buying on the Internet, those who are not used to shopping

online declared fear of fraud, negative past experiences and preference for buying tourism services while traveling and not in advance.

In terms of travel and trip organization, the majority (86%) of participants buys each service separately (i.e. flights, hotels, transport) on the hospitality companies' websites on their own, without relying on an online travel agency (Figure 3). Indeed, it appears that 63.8% of travelers use tourism search engines and travel agencies exclusively for the initial travel research and then they purchase each service separately on the corresponding companies' websites.

Fig. 3: Online tourism purchasing



Source: Author's elaboration

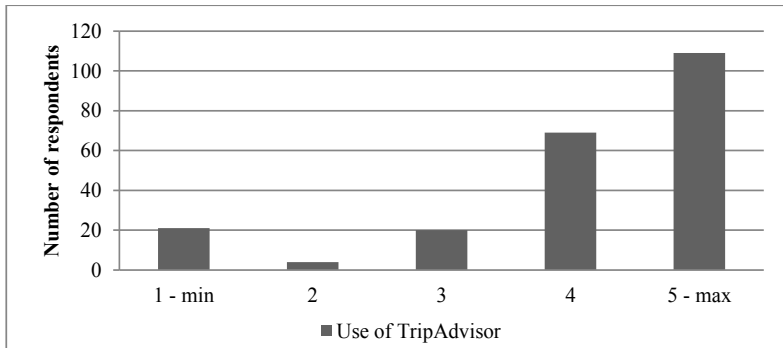
3.2.3 Factors driving the use of tourism websites and social channels

We asked participants to answer some questions about which kinds of online travel agencies they had or had not already heard about and which kinds they had used more often. On one hand, it emerged that Americans usually consult Expedia as an online travel agency (OTA), while they use Kayak as a meta-search engine for online tourism booking. Americans often rely on other OTAs, which are Hostelworld, Airbnb, Travelocity and Hipmunk, as was suggested in the subject questions. On the other hand, it appears that Italians prefer to employ Booking as an online travel agency, while they use Kayak and Skyscanner as meta-search engines. In the open questions, Italian consumers made reference to other OTAs, such as Hostelworld, Airbnb, Viaggiare, Alpitour, Yalla Yalla, Volagratis and Voyage Privé.

We also asked participants whether they searched online for opinions and feedbacks on websites' reliability before making payment: 67.3% of respondents always do it, followed by 28% of them who sometimes do it. Among these, 79.8% of respondents use TripAdvisor for this purpose.

As can be seen in Figure 4, in a five-point Likert-type scale, respondents answered that they use it to read some opinions regarding people's past experiences, rated with five points (highest range). Using the same measurement scale, they gave a one-point rating (lowest range), stating that they seldom use it to write their own feedbacks after they have experienced a service.

Fig. 4: Use of TripAdvisor



Source: Author's elaboration

The last part of the survey dealt with the recent phenomenon of social channels, such as Groupon and other websites selling deals online. We asked participants whether they buy coupons and deals on Groupon, and only 48.2% of them answered positively. Among these respondents, only 20.2% were Americans, and the remaining 99 respondents were divided into 93 Italians, one German, one British, one Romanian and one Spanish user. The reason for this choice is probably driven by the fact that they had had experience of coupons and deals that had not satisfied them: 35.8% of the respondents were disappointed or would prefer to buy services and products at full price.

In a five-point Likert-type scale, it emerged that respondents usually buy coupons and deals for restaurant services, rated with five points (highest range). An important outcome is that they seldom buy coupons for travel deals, rated with one point (lowest range).

We distributed a subject question, in order to understand the differences between the Italian and American use of social channels. We asked respondents which other kinds of websites selling deals like Groupon they knew. American consumers reported Living Social, Yelp, The Addsheet and Amazon, while Italians stated Groupalia, Kauppa, LetsBonus, Scontamelo, Poinx, Privalia and Tippetst. Given these answers, it can be seen that Italian respondents use social channels more often in order to save money and find the best offers.

4. Conclusions

4.1 Discussion and managerial implications

The evidence emerging from the analysis performed highlights how technological innovation has changed the relationship between company and customer and the buying behavior of the latter in the tourism industry.

As far as the new model of relationship with the customer is concerned, the new ITC tools play an important role in communicating and promoting

the brand and in winning customers. In this area, the drivers of an effective marketing strategy in the tourism sector can be identified as follows:

- be found on the web: the user must have easy access to travel offers using ordinary tools for surfing the web;
- listen to the voice of the web: it is necessary to understand what is the users' sentiment towards the tourist brand;
- ensure that people speak well of you: setting up ad hoc campaigns is essential for increasing brand awareness and conveying a positive image of the products with regard to the most widely discussed topics (quality, price, ...)
- build a rapport with the customer: use of a social channel and viral diffusion logic enables contact with the customer to be established and maintained.

To be innovative, the marketing strategy must blend the core elements of the brand and the characteristics of the two-way relationship typical of social media with the exclusive experience associated with the buying experience.

In order to be successful, the modern marketing strategy requires the management to implement in an integrated manner the use of the tools available in order to improve the quality of the accessory/ancillary services which are increasingly demanded by the customer (Kotler e Keller, 2008). In this area, it is essential to dedicate to communication adequate technical and professional resources to form teams of experts who are capable of managing the new technologies and skilled in creating innovative, continuative and direct communication methods.

Innovation in the approach to marketing contributes to revolutionizing the approach of the tourist user by means of a three-stage sequence.

The first stage focuses on experience. Digital interfaces extend the ways of interacting with the contents of the communication, enabling new models through which the consumers relate with the products. At the same time, digital channels enable the customers' experience of the brand to be strengthened by integrating all the communication media.

The second stage concentrates on socialization. The users present on the web become media themselves, in other words an instrument of amplification, of viral communication, for spreading the fame of the brand, of its products, of its advertising. Embracing the social media means reaching potential and future customers.

The third stage concerns uniqueness. Providing a service must not be an activity like another, but must satisfy the wish for uniqueness and exclusivity and must be up to, if not beyond, the customers' expectations. The digital channels are a perfect tool for enabling a model which by integrating web channels, social media and the physical channel allow an exclusive communication and sales strategy to be adopted.

The correct implementation of an approach of this type makes the relationship between the actors involved more intense and raises the customer's degree of satisfaction with regard to both the tangible aspects of the relationship (competence, handling of problems, clarity of language, reliability of the offer) and the intangible ones (kindness, proactiveness, quality of the personal relations, courtesy, confidentiality, trust).

In this context communication becomes a more strategic tool in the marketing mix. The spreading of the web 2.0, the social networks and mobile devices has opened up new prospects for relationships between operators in the sector and the potential consumers (Park and Oh, 2012). As suggested by Fyall and Leask (2007), communication with tourists must occur before, during and after the actual visit in order to answer the needs of a varied, constant and sophisticated interaction (Dore and Crouch, 2003; Foley and Fahy, 2004).

Various airline companies have started to use the new technologies in order to answer travelers' needs to receive information in real time. As reported by Park and Oh (2012), Continental Airlines uses instant messaging to offer its passengers a direct and rapid channel of interaction. Another interesting case is that of Korean Airlines (Park and Oh, 2012) which, in order to create a competitive advantage over their competitors, has set up a web marketing campaign. Using Facebook and Twitter, the airline company improves its corporate image and creates bonds with the consumers by offering them the chance to share travel experiences and involves them by means of competitions to elect the most desirable destinations. Furthermore, these instruments are used to obtain detailed information regarding potential consumers, their needs and preferences thanks to the depth and frequency of the communication.

Jet Blue is another success story. The low-cost airline decided to use Twitter as a channel for its customer service. The company managers noticed that their passengers incurred problems due to delays, cancellations and other unforeseen events and they discovered that the information and assistance in the majority of cases were not provided promptly enough. To overcome this problem, they decided to use Twitter to circulate the information that needs to be provided in good time: in this way, the customer service operators reply in real time to the passengers' questions, establishing a more efficient, rapid and informal relationship with them.

The increased use of smartphones and tablets has contributed towards changing communication methods in the tourism sector by the introduction of applications (apps). By means of specially created apps, destinations can be seen in advance by means of virtual tours inside museums or archaeological sites and hotels can be chosen on the basis of interactive tours of the hotel buildings and facilities.

As Birkner stated (2011), apps could prove to be an instrument of communication and promotion for countries which do not have particularly high numbers of visitors. The case of Visit Korea is emblematic: the app includes recommended itineraries, a photo gallery, practical information for international tourists (exchange rates updated in real time, useful phrases in Korean). This instrument is only a part of the integrated web marketing campaign that has seen the Korea Tourism Organization on the main social networks such as Facebook, Twitter and YouTube and which addresses international visitors through the internet site Buzz-Korea.com.

Another example of integrated communication which benefits from the advantages of technological innovation is represented by Expedia, the website founded by Microsoft in 1996, where users can book plane tickets, hotels, hire cars, cruises, package holidays and various services by Internet

or phone. To involve potential customers while choosing the hotels and to provide more useful information for choosing the place to stay, Expedia has created expediahotel.view.com, which combines reviews from users with photos from their Flickr profile, Google Street View so that the exact location can be pinpointed, with a description of the strong points, thus guiding the tourist in an interactive way.

Bearing in mind that some of the aspects of communication (e.g. transparency, speed of the replies) are amongst the key factors influencing purchasing preferences, it seems clear that the tourism industry must strengthen its investment in communication in order to build a long-lasting relationship with its customers. Effective written communication (letters, bank statements) in verbal contacts (telephone), in advertising (notices, posters), on the Internet and on social media, is a tangible means for promoting the loyalty and satisfaction of the consumer (Howcroft *et al.*, 2003).

4.2 Limitations and future research

As with all research, some limitations of this study must be recognized. The present study suffers from a small sample size and a selection process that cannot be representative of the larger population of tourist customers. Hence, the results from the current study cannot be generalized to this wider community. Therefore, further analysis will be necessary to corroborate the findings adequately and also investigate whether our results are typical for other actors (e.g. travel agencies).

This paper opens up several avenues of potential future research. In fact, an opportunity is presented to seek out new data which permit the validity of our results to be extended and to evaluate whether the findings are reflected in different tourist clusters and also in different countries. This could lead to a more comprehensive understanding and knowledge of the specific role that e-tailing could play in achieving a shared value creation within the tourism industry.

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Does social couponing stimulate positive eWOM and online referrals?¹

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Abstract

Purpose of the paper: Social couponing campaigns are becoming increasingly popular among hotels. However, while their short-term impacts have been assessed, their medium and long-term benefits for the hotels' reputation have not been measured yet. The purpose of this study is to provide evidence of the potential of social couponing to stimulate positive electronic word-of-mouth (eWOM) and online referrals to hotels. In addition, this research intends to identify the factors related to the design and management of the couponing campaign, which influence the couponers' willingness to engage in positive eWOM and referrals.

Methodology: The study is based on the content analysis of 564 TripAdvisor reviews posted by guests that have stayed at 76 Italian hotels using a Groupon's coupon. Both frequency and co-occurrence analysis are performed.

Findings: The results show that social couponing stimulates intense positive eWOM and referrals. The analysis also highlights the most important coupon-related factors, which are able to influence the valence (positive vs. negative) of the eWOM.

Research limits: The small sample of hotels, considered in this research and the specific features of the Italian hotel industry suggest caution in generalizing the results to other settings.

Practical Implications: Hotel managers should design and manage their couponing campaigns carefully considering several factors, identified by this study, which directly stimulate positive eWOM. The findings of this research also suggest that hotel managers could use couponing campaigns as effective tools for their online reputation management strategies.

Originality of the paper: This paper provides empirical evidence of the eWOM and referral effects of social couponing. Hence, it complements previous studies, which have mostly considered the short-term effects of social couponing related to sales increase.

Key words: social coupons; daily deals; flash sales; hotels; electronic word-of-mouth; eWOM

1. Introduction

Social couponing (labeled also as *flash sales* or *daily deals*) is a form of sales promotion that has enjoyed widespread popularity among hotels in the last few years (Berezina *et al.*, 2016; Cassia *et al.*, 2015; Minazzi, 2015; Piccoli and Dev, 2012). It consists of "an intermediary that manages a list of

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subscribers through e-mail and social media, and offers merchants access in exchange for a commission, allowing them to promote their offerings at a steep discount” (Boon *et al.*, 2015, p. 3). Up to now, social couponing campaigns have been used by hotels with the primary aim of selling their unsold room inventory (Yang *et al.*, 2015). Hence, hotel managers have mostly considered this tool for its potential to provide short-term incentives to stimulate purchases (Yang *et al.*, 2015).

However, different from traditional coupons, social coupons not only have the potential to promote short-term sales, but may be also used by hotels to increase their brand awareness (Berezina *et al.*, 2016). In fact, daily deal reach a number of subscribers which is much higher than the number of deal purchasers. In addition, these deals are designed to stimulate viral effects and online conversations (Boon, 2013; Boon *et al.*, 2012). For example, daily deal sites include features that allow consumers to share deals via social networks (Nakhata and Kuo, 2014). In addition, deal campaigns’ limited duration is used to stimulate intense and quick referrals (Drossos *et al.*, 2015; Lo *et al.*, 2014). Hence, the e-word-of-mouth (eWOM) and the referral value should be carefully considered to appreciate the overall effectiveness of a social couponing campaign (Kumar and Rajan, 2012). Nonetheless, when evaluating the effectiveness of social couponing, hoteliers seem to overlook the social aspects of social couponing (Cassia *et al.*, 2015). This is not surprising as operators are still learning how best to use daily deals (Piccoli and Dev, 2012). Until recently, academic research has also largely overlooked the social effects of this marketing tool.

In the last few years (and particularly in 2014 and 2015), several studies have started to examine deal subscribers’ purchase, redemption and after-consumption behaviors, highlighting the social aspects of social couponing in general, and in the hotel industry in particular (Cox, 2015). Nonetheless, this stream of studies still presents two main limitations.

First, these contributions focus only on the effects of eWOM among daily deal users and they do not consider the impact on regular customers, i.e. customers staying at the hotel without a coupon. In sum, these studies conclude that the decision to purchase deals is influenced by the recommendation made by other coupon users. However, if coupon users have a satisfying (vs. unsatisfying) experience at the hotel, they may engage in positive (vs. negative) eWOM, thus acting as brand ambassadors (vs. detractors) and improving (vs. damaging) the overall hotel reputation, with effects on both coupon users and regular customers. Second, available studies do not quantify the amount of this positive vs. negative eWOM stimulated by social couponing.

The purpose of this study is to contribute to fill these gaps, by establishing whether, in the hotel industry, social couponing is able to stimulate positive eWOM and referrals on the most prominent travel review site, TripAdvisor. In detail, this study intends to reach two aims:

- assessing the amount of positive vs. negative eWOM and referral generated on TripAdvisor by coupon users that stayed at a hotel;
- identifying the coupon-related factors that are able to explain the valence (positive vs. negative) of the eWOM.

For this purpose, this study presents the results of the analysis of the customer reviews on TripAdvisor posted by guests that stayed at 76 Italian hotels using daily deals.

From a theoretical perspective, the findings of this study will provide empirical evidence of the social effects of the daily deals, thus advancing available knowledge about social couponing in the hotel industry (Berezina *et al.*, 2016; Cassia *et al.*, 2015) and social commerce (Yadav *et al.*, 2013). The results will also enrich available knowledge about eWOM management in the hospitality sector (Baka, 2016; Schuckert *et al.*, 2015).

From a managerial perspective, this study provides hotel managers with new evidences to perform a comprehensive evaluation of social couponing effectiveness. Several hotel managers show a medium-to-low level of satisfaction with this marketing tool, mainly due to its ineffectiveness to attract loyal customers (Piccoli and Dev, 2012). Our findings make managers appreciate the additional social effects of social couponing which may compensate for the low number of returning customers. The results may also assist managers in designing their strategy when managing eWOM.

The remainder of the paper is articulated as follows. The next section presents a review of the literature on social couponing, with the purpose of highlighting the relationship between social couponing and eWOM. After that, the methods and the results are presented. Discussion and conclusions complete the paper.

2. Social couponing and eWOM

2.1 Overview of the social couponing literature

Social coupons are prepaid online discount vouchers offered by merchants (e.g. hotels, spas, and restaurants) through daily deal websites, such as Groupon, LivingSocial and others (Kumar and Rajan, 2012; Ong, 2015). Social couponing started to take off in 2008, when the current market leader - Groupon - was founded. Consequently, the popularity of this phenomenon has attracted the interest of academic researchers in the last few years. In particular, the work by Kumar and Rajan (2012) may be considered the first comprehensive scientific conceptualization about social couponing. Recently scholars from several disciplines (marketing, hospitality and information technology) have addressed this phenomenon from the perspectives of its different participants: coupon users, daily deal websites and aggregators, merchants. In sum, the social couponing literature has covered the following issues:

- the general functioning of social couponing (Kumar and Rajan, 2012; Sigala, 2013);
- factors explaining the performance of daily deal campaigns (Eisenbeiss *et al.*, 2015; Song *et al.*, 2016; Subramanian and Rao, 2016);
- popularity, benefits, drawback and management of social couponing for merchants in general (Aday and Phelan, 2015; Lee and Lee, 2012) or with a specific focus on restaurants (Heo, 2016; Kimes and Dholakia, 2011; Wu *et al.*, 2012), hotels (Berezina *et al.*, 2016; Cassia *et al.*, 2015), health and wellness businesses (Lee, 2016);

- role, strategies and operations of daily deal websites (Krasnova *et al.*, 2013) and daily deal aggregators (Blanco *et al.*, 2015);
- coupon users' attitudes and behaviors focusing on the purchase phase (Cheah *et al.*, 2015; Coulter and Roggeveen, 2012; Luo *et al.*, 2014; Nakhata and Kuo, 2014; Parsons *et al.*, 2014), the redemption phase (Nakhata and Kuo, 2016) and the after-consumption phase (Cox, 2015).

A few studies have specifically examined the relationship between social couponing and eWOM, which represents the focus of this study. This stream of literature is reviewed in the next section.

2.2 *The relationship between social couponing and eWOM*

Deals users' engagement in rich eWOM is often reported as a distinctive feature of social couponing compared to traditional couponing (Lee *et al.*, 2015). However, empirical knowledge on this issue is scarce (Boon *et al.*, 2015). Only recently, contributions have started to investigate daily deal subscribers' purchase, redemption and after-consumption behaviors, including eWOM.

This new stream of research has highlighted that eWOM, generated by deal purchasers, may drive other people to buy the deals. When daily deal subscribers receive deal newsletters, most of them decide to buy only one deal or none at all (Boon *et al.*, 2015).

This often happens because deals are mainly offered by local merchants and consumers are often unfamiliar with their brands (Luo *et al.*, 2014; Nakhata and Kuo, 2014). In addition, several consumers resist because they think that using deals would make them look cheap (Boon, 2013). Hence, subscribers look for suggestions and reviews of purchasers that have already bought and redeemed the coupon. Therefore, eWOM generated by deal purchasers is highly influential.

Based on these premises, Luo *et al.* (2014) reported that a deal popularity (expressed by the cumulative amount of deals purchased by other people) increases a consumer's purchase likelihood and reduces the time the consumer will take to redeem the deal. In addition, this effect is amplified by customer referral intensity.

Similarly, Nakhata and Kuo (2014) found that consumer rating (consumer evaluation after consumption) and the number of purchased social coupons have a substantial impact on purchase likelihood of social coupons, especially for low variety seekers consumers, i.e. for consumers perceiving greater risk. Finally, Ong (2015) demonstrated that daily deal purchasers (in particular those that are highly satisfied with the redemption of the deal) show better attitudes toward daily deals and are particularly active in referring them to their friends. Moreover, their reviews of deals are fundamental to enhance the credibility of daily deals in general.

Therefore, recent studies have found that the eWOM activated by coupon users is able to persuade other people interested to buy the deal. However, these studies have not considered that the mentioned eWOM may have a persuasive effect on regular customers (i.e., customers staying at a hotel without a coupon).

A significant exception is the work by Cox (2015), who analyzed online travel reviews posted on a prominent website (that is a recognized leader in online reviews for the tourism industry) by guests who stayed at some Australian hotels using a coupon. This website is visited not only by people evaluating whether to buy a deal for a specific hotel, but also by potential “regular customers”. Therefore, the eWOM generated by couponers on this website may influence both other couponers and regular customers. Cox (2015) found that about 55% of the guests recommended the hotel favorably. Nonetheless, her study did not present an in-depth analysis of eWOM valence and of the factors that are statistically correlated with positive vs. negative eWOM. This paper aims to contribute to fill these gaps.

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3. Methods

A qualitative approach similar to the one adopted by Cox (2015) was applied. In detail, we analyzed 564 reviews posted on TripAdvisor by guests that stayed at 76 Italian hotels using Groupon’s coupons. Groupon is the leader in the Italian daily deals market with about 50% of the market share (Magno *et al.*, 2014a; Magno *et al.*, 2014b). To identify the 564 reviews, we followed this procedure. First, we selected 76 hotels which, based on our previous studies (Magno *et al.*, 2014a), had run at least one coupon campaign through Groupon before October 2012.

Then, we collected all customer reviews published up to the end of June 2015 on TripAdvisor for the 76 hotels, obtaining 14,416 reviews. These reviews were carefully analyzed to select those making explicit reference to Groupon. Through this analysis, we found 564 reviews of guests that explicitly stated that they stayed at one of the 76 hotels using a Groupon’s coupon.

We then coded each of the 564 reviews (Capriello *et al.*, 2013) with the support of the software *Dedoose*. Comments were coded independently by the authors of this paper. In defining the codes, we followed the process suggested by Saldaña (2009).

Initially we used codes (for eWOM valence, intention to recommend and coupon-related factors explaining the performance of the couponing campaign) based on the findings of previous literature about eWOM and social couponing. After this initial step, codes were refined and new codes were added to reflect new concepts, which emerged during the first part of the analysis. In case of disagreement, discussion took place among the authors to end up with an agreed-upon codification.

Through this process, each comment was classified as a source of positive, neutral or negative eWOM. Several magnitudes of referrals were identified, as well, including: unconditional recommendation to stay at the reviewed hotel; recommendation to stay at the reviewed hotels only with a coupon; recommendation not to stay at the reviewed hotel.

As regards the factors that explain the positive / negative valence of the eWOM, we did not search for general antecedents of satisfaction, such as hotel facilities or cleanliness.

Only factors related to the daily deal were of interest for this study and therefore only these aspects were coded and analyzed. For example, we did not consider price per se, but we included the impact of price on couponers' expectations: because of the low price paid for staying at the hotel, some couponers reported they had lower pre-stay expectations (the code "Expectations: Lower for couponers (value for money)" was used for this concept).

In detail, the following codes were used:

- eWOM: Negative;
- eWOM: Neutral;
- eWOM: Positive;
- Recommend: No;
- Recommend: Yes;
- Recommend: Only with coupon;
- Expectations: Lower for couponers (value for money);
- Expectations: Unmet expectations;
- Expectations: Met expectations;
- Expectations: Beyond expectations;
- Expectations: Worried (negative reviews);
- Booking-related problems;
- Differences between advertised and real conditions;
- Lack of transparency;
- Push to purchase additional services;
- Treatment: B-level treatment;
- Treatment: Treated as regular customers;
- Attempts to "cheat" the couponers.

We then analyzed the frequency of each code and we estimated the co-occurrence of positive/negative eWOM and of the identified factors through a correlation analysis.

To offer further evidences, each of the hotel ratings (from 1 to 5) provided on TripAdvisor by the authors of the 564 reviews was compared with the average rating of the hotel being evaluated to ascertain whether coupon users' evaluations were similar to the average evaluations.

4. Results

Table 1 provides the frequencies with which each code came up in the reviews. The results show that the positive eWOM (n=380) largely prevails over negative eWOM (n=94) and neutral eWOM (n=90). 112 explicit positive recommendations were also registered, compared with only 18 reviews which advised readers not to stay at the hotel.

Tab. 1: Frequencies of codes

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Codes		Frequency
eWOM	Negative	94
	Neutral	90
	Positive	380
Recommend	Yes	112
	No	18
	Only with coupons	8
Expectations	Lower for couponers (value for money)	81
	Unmet expectations	8
	Met expectations	17
	Beyond expectations	58
	Worried (negative reviews)	24
Treatment	B-level treatment	30
	Treated as regular customers	21
Booking-related problems		26
Differences between advertised and real conditions		26
Lack of transparency		23
Push to purchase additional services		12
Attempts to “cheat” the couponers		37

Source: our analysis

In addition, we calculated the average rating provided by the 564 guests that stayed at the 76 hotels with a coupon, obtaining a value of 3.66 (on a 5-point scale). This value was slightly, but significantly lower ($t(563)=4.68$; $p<0.01$) than the average value provided by the average customers for the same hotels, which was equal to 3.88. Table 2 shows the detailed frequencies of the 564 evaluations.

Tab. 2: Frequencies of the ratings provided by the 564 guests that used a coupon

Rating	Frequencies (n=564)
1	42 (7.4%)
2	45 (8.0%)
3	117 (20.7%)
4	217 (38.5%)
5	143 (25.4%)

Source: our analysis based on customer ratings posted on TripAdvisor

After that, we evaluated the co-occurrence between positive/negative eWOM and coupon-related factors through the estimation of correlations

coefficients (Phi coefficients). Through this calculation, it was possible to ascertain which coupon-related factors occurred together with positive/negative eWOM in the customer reviews. Table 3 shows the results.

Tab. 3: Correlations between positive/negative eWOM and coupon-related factors

	Positive eWOM	Negative eWOM
Coupon-related factors		
Expectations: Lower for couponers (value for money)	-.035	-.059
Expectations: Unmet expectations	-.172**	.188**
Expectations: Met expectations	.101*	-.079
Expectations: Beyond expectations	.187**	-.151**
Expectations: Worried (negative reviews)	.129**	-0.71
Booking-related problems	-.207**	.242**
Differences between advertised and real conditions	-.225**	.197**
Lack of transparency	-.126**	.068
Push to purchase additional services	-.050	.000
Treatment: B-level treatment	-.247**	.164**
Treatment: Treated as regular customers	.137**	-.088*
Attempts to “cheat” the couponers	-.287**	.324**

Source: Source: our analysis, *p<0.05; **p<0.01

The analysis of correlations suggests that positive customer reviews (positive eWOM) are likely to include statements about the guests’ pre-stay worry mainly due to negative online reviews about the hotel. At the same time, in these reviews the codes “met expectations” and “beyond expectations” occur frequently, suggesting that the initial worry was overcome thanks to a positive experience. In particular, positive eWOM shows a strong correlation with the code “treated as regular customers”. Therefore, it is possible to infer that the pre-stay worry was, at least in part, related to the expectation of being treated as b-level customers. This expectation was falsified by the experience, emphasizing positive eWOM.

As regards the customer reviews expressing negative eWOM, several codes co-occur with high frequency: unmet expectations, booking-related problems (such as, the lack of room availability in the desired period), differences between the conditions advertised on the deal and those offered by the hotel, b-level treatment for guests using a coupon and the perception that the hotel had been trying to “cheat” the couponers.

5. Discussion and conclusions

This study provides evidence that guests that stay at a hotel using a coupon actively engage in eWOM through customer reviews websites and that such eWOM has prevalingly positive valence.

The particularly high frequency of positive eWOM may be partly the result of couponers' willingness to show to other people that they were able to get a bargain. Interestingly, the results highlighted a significant difference between the frequency of positive eWOM (n=380) and the frequency of recommendation to stay (n=112).

This gap may have several explanations. Couponers may be willing to recommend to other people to stay at the hotel only when they experienced a very high level of satisfaction. Alternatively, couponers may have established an unconscious assumption that recommendation to stay would imply paying the full price.

In addition, the findings show that the decision of guests to engage in either positive or negative eWOM about the hotel is influenced by some coupon-related factors which can be directly managed or at least influenced by the hotels.

In particular, hotels that treat coupon users as b-level customers are likely to receive negative eWOM. This may be the case of hotels which approach social couponing as a pure sales promotion tools, thus not considering its medium-term, social effects. For example, the analysis of the reviews highlights that in many cases guests had problems in redeeming their coupons because the hotel had no room availability.

This may suggest that some hotels had sold an extremely high number of coupons but were not prepared to meet the resulting demand, since they overlooked the importance of customer experience. Hence, these hotels were more focused on increasing traffic than on offering a positive experience to coupon users.

Conversely, the findings show that hotels which have received positive eWOM were able to go beyond the pre-stay expectations of coupon users and to overcome their worries. By treating these guests as regular guests, these hotels provided them with high quality experiences.

As a result, coupon users acted as brand ambassadors, engaging in rich eWOM.

Therefore, the results of this study underline that, when evaluating the effectiveness of a social couponing campaign, hotel managers should consider both the short-term increase in sales and the medium-term effects on brand knowledge and reputation, which are strongly influenced by eWOM. As a consequence, hotel managers may decide to implement social couponing as a tool for their online reputation management strategy (Baka, 2016).

This study presents several limitations, mainly related to the small sample of hotels and to the specific characteristics of the research setting. In fact, the average hotel size is much smaller in Italy than in other countries such as the United States.

In addition, none of the hotels considered in this analysis belonged to a chain: actually in Italy social couponing has been almost exclusively used by independent hotels (Cassia *et al.*, 2015). Therefore, it may be useful to conduct similar research in other countries to draw more solid conclusions.

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Feature

di Claudio Baccarani e Gian Luca Gregori

Buon pomeriggio a tutti, onorati di essere qui con Voi ed onorati di intervistare Enrico Loccioni, con il quale il sistema Universitario collabora sinergicamente da oltre 40 anni.

Perché un intervento del genere in questo convegno? Proprio nell'accezione allargata di Cultura, di Heritage, soprattutto in termini di tutela e di valorizzazione del territorio. Ciò nella consapevolezza che svolgere attività di impresa significa creare valore per il territorio e per la Comunità.

Una frase che ci ha colpito molto di Enrico è la seguente: "non chiamatela azienda, la mia è una bella avventura", costruita insieme alla moglie Graziella, colonna fondamentale nello sviluppo del percorso imprenditoriale, purtroppo recentemente scomparsa e considerata una "mamma da tutti i 400 «ragazzi» del gruppo".

Potremmo in un titolo sintetizzare così la traiettoria evolutiva del Gruppo Loccioni: "dalle mucche, all'elettricista, ai produttori più importanti nel mondo!"; questo ad evidenziare innanzitutto il ruolo fondamentale che ha avuto il mondo agricolo, nel quale Enrico cresce e sviluppa la sua prima "invenzione": un sistema per abbeverare gli animali delle stalle in "modo automatico", grazie alla grande innovazione che fu l'arrivo dell'elettricità e ad i primi rudimenti di elettrotecnica appresi a scuola e quindi evitando di portare manualmente pesi rilevanti. Questa soluzione colpì molto i contadini della zona, che andavano a vedere (potremmo dire a "spiare") il risultato dell'ingegno di un giovane ragazzo. Ma il "tema" che poi Enrico ha sviluppato in tutta la sua vita è stato sempre lo stesso, come nel caso delle mucche: "partire dai bisogni e trovare soluzioni", anzi, il motto prevalente è: "dove ci sono problemi, allora siamo pronti ad intervenire perché là ci sono opportunità!"

Prima di iniziare la mia attività ho avuto una breve esperienza come dipendente in una fabbrica e allora ho capito che non amavo il lavoro ripetitivo e che non volevo più farlo e non volevo costringere qualcun altro a farlo. Per questo ho deciso di non orientare la mia attività su una produzione in serie. Ma ho subito capito che una decisione di questo tipo implicava il coinvolgimento del territorio, della scuola e la collaborazione con le migliori imprese e i migliori artigiani degli altri settori. Ho ripetuto più volte che il gruppo Loccioni ha cercato sempre di lanciare sassi nell'acqua per scatenare onde. Esattamente come quando lanciamo un sasso nell'acqua e si genera un'onda che si allarga ma allo stesso tempo sembra tornare indietro, così l'impresa dovrebbe, attraverso le sue azioni, creare un'onda di interesse e di coinvolgimento che si diffonde nel territorio e torna indietro attraverso competenze e know how da poter reinvestire in nuovi progetti.

¹ Intervista realizzata durante la sessione plenaria del 10 luglio 2015 in occasione del XXVII Convegno Annuale di Sinergie "Heritage, management e impresa: quali sinergie?", Termoli 9-10 luglio 2015.

Lettricista è stato il primo vero lavoro di Enrico, che inizia in modo artigianale a realizzare impianti elettrici per varie imprese della zona; quindi organizza l'attività in modo più industriale, crescendo in termini dimensionali; ma è la sua visione che consente di allargare la prospettiva, ponendo un'attenzione crescente al tema della misurazione ed alla trasformazione dei dati in valore. Una sua considerazione poneva al centro il benessere delle persone, considerando l'evoluzione delle metropoli: "dobbiamo essere in grado di misurare il livello di inquinamento, di utilizzo dell'acqua, di energia..."; per migliorare la qualità della vita delle persone; ed il concetto di benessere si è poi spostato anche agli animali, tema oggi molto di attualità, soprattutto riguardo alle condizioni di vita negli allevamenti intensivi.

Il gruppo Loccioni è un'impresa familiare che offre soluzioni integrate per migliorare la qualità ed aumentare la sostenibilità dei prodotti e dei processi. Uno degli aspetti che curiamo maggiormente è la misurazione dei dati perché attraverso di essa si acquista la consapevolezza di ciò che si fa.

Non amo parlare né di fabbrica, né di industria, per il semplice fatto che non facciamo attività manifatturiera, non abbiamo linee di produzione ma sviluppiamo progetti e ogni progetto è un'avventura a sé.

Il vero obiettivo della nostra impresa è quello di migliorare la qualità della vita delle persone in modo sostenibile. Fare impresa per creare valore e valori insomma.

Da qui, la conquista della fiducia dei più grandi produttori nel mondo, nel settore automotive, degli elettrodomestici, dell'energia, dei trasporti, dell'aerospaziale, dell'agroalimentare e di recente anche nella sanità, con lo sviluppo del primo robot al mondo per la preparazione automatica delle dosi dei farmaci per le terapie oncologiche, annullando il rischio di tossicità per gli operatori della farmacia e la possibilità di errore nella preparazione degli stessi. Nella ricerca dei clienti, la strategia è: "tra i player più importanti del mondo"! In ogni settore si cerca la partnership con i leader di mercato dai quali raccogliere sfide innovative e stabilire relazioni di lungo periodo.

Come una sartoria dove ogni cliente richiede soluzioni in base alle proprie misure ed esigenze noi creiamo per le nostre cinque aree di business - energy, environment, industry, humancare e train and transport- reti di ricercatori che si scambiano informazioni per migliorare la qualità dei prodotti. Per esempio l'energia prodotta da fonti rinnovabili è intermittente e discontinua: noi abbiamo lavorato su sistemi di accumulo dell'energia integrando batterie di diverse tecnologie e taglie. In tal modo la produzione di energia verde diventa davvero più efficace e sostenibile.

Laccoglienza è un fattore determinante nella strategia del gruppo, non "artificioso", cioè costruito, ma diremmo "spontaneo". Non a caso è continuo il processo di conoscenza locale e globale basti pensare alla sede, nella Valle Esina, ad Angeli di Rosora. Così più volte, scherzando ma non troppo, i collaboratori del Gruppo quando si presentano dicono che hanno sede a Los Angeles di Rosora, anche oggi che il Gruppo ha tre sedi, negli Stati Uniti, in Germania ed in Cina. Il Gruppo Loccioni si trova in aperta campagna.

Nella sua sede circolano vari animali in libertà, tra cui gru coronate e pavoni impegnati spesso a guardarsi negli specchi appositamente collocati per soddisfare la loro vanità (in realtà il pavone allo specchio fa la ruota perché in sfida con il “rivale” di fronte a lui).

La saggezza contadina ed i valori che ne derivano sono alla base di questo legame con il territorio come fattore competitivo. Così il padre di Enrico, che ne è espressione tipica, suole ripetere quando vede “persone troppo agitate”: “mica devi fare tutto oggi, lasciati da fare qualcosa anche domani!”.

Io credo di aver imparato tanto dalla tradizione e dalla cultura contadina: il senso di fiducia - gli accordi presi con una stretta di mano - di comunità, del sacrificio. Insomma lo sguardo alla tradizione per me è sempre stato fondamentale, però nello stesso tempo ho sempre pensato che la tradizione doveva darci degli spunti per creare qualcosa di nuovo, per innovare quindi e non per rimanere solo legati al passato. Uno studente che ci ha fatto visita durante uno dei laboratori aperti che organizziamo da tempo ha coniato il termine Tradinnovazione che io continuo ad usare perché ben riassume il mio sentire, il valore culturale di un territorio e della sua storia in una visione aperta al futuro. Credo che in un'impresa debbano sempre esserci energia, entusiasmo, passione e senso di responsabilità e che al suo interno sia necessario coltivare l'immaginazione che ci aiuta nella costruzione del futuro.

E questo legame con il territorio trova tangibile riscontro in due progetti: la Leaf Community e il Land of Value. Con la Leaf Community, è stato realizzato un progetto di riqualificazione energetica degli edifici industriali e di tutta l'area del “campus” Loccioni, inclusa la costruzione di una “casa intelligente”, autonoma e per nulla impattante sull'ambiente, riprendendo il concetto della “casa contadina”, autonoma nella sua gestione. In collaborazione con grandi gruppi internazionali, si è realizzata una comunità ecosostenibile e la prima micro-grid energetica in Italia, dimostrando che è possibile rendere operative progettualità di questo tipo.

Il Land of Value rappresenta un “metodo di valorizzazione” del territorio, ma anche un approccio distintivo che è alla base della costruzione di un'esperienza, che sembrerebbe così distante dalle soluzioni high tech proposte dall'impresa. Eppure funziona, con risultati sorprendenti! L'idea è semplice ed è quella di trasformare le tipicità del territorio in un fattore fortemente competitivo. Così l'accoglienza dei manager internazionali avviene ricorrendo ad una rete di agriturismi, dove l'occasione è quella di soggiornare e di usufruire dei prodotti eno-gastronomici locali. In alcuni casi i manager ritornano in vacanza con le famiglie in queste originali strutture ricettive. Così, le colazioni di lavoro non sono affidate ai tradizionali catering, ma agli artigiani locali agro-alimentari che illustrano i propri prodotti, rilevandone le principali caratteristiche. Anche in questo caso, si riscontrano risultati molto positivi, in termini di “qualità sorprendente delle relazioni”.

Fare rete con il territorio, con le sue istituzioni, con la sua comunità culturale ed economica è fondamentale per noi. Tra vivere il territorio e semplicemente “alloggiarlo” noi abbiamo deciso di viverlo. L'impresa vive e prospera se vitale e prospero è il territorio che abita ed è sua responsabilità e

interesse fare in modo che lo sia. Nel 1990 la nostra impresa si è allagata a causa dell'erosione del fiume Esino e siamo riusciti a riprendere il lavoro nel giro di una settimana solo grazie al lavoro di tutti i nostri collaboratori e delle loro famiglie. In seguito abbiamo deciso di prenderci cura dei 2 km del fiume tra i ponti di Scisciano e Airo attraverso il ripristino del corso originario del fiume, il rinforzo degli argini e l'installazione dei sistemi per il monitoraggio sia del fiume che del ponte, abbiamo finanziato il rimboschimento dell'area e la costruzione di una pista ciclabile. Questo investimento è per noi un investimento sul futuro che fa riscoprire alle persone il valore della tradizione riportando un elemento naturale, come il fiume, ad essere una risorsa e non una minaccia. Ecco perché amiamo dire che abbiamo investito su 2 km di futuro. Come dice il protagonista dello spot che abbiamo girato per raccontare questo progetto "da grande voglio coltivare bellezza in 2 km di futuro.

Il designer giapponese Isao Hosoe vi ha definito una Play Factory, in che senso?

All'inizio questa definizione ci ha piuttosto sorpreso ma poi riflettendo abbiamo capito che essa riesce a racchiudere aspetti della nostra impresa che sfuggivano ad altre descrizioni: per esempio il fatto che non abbia una struttura gerarchizzata, non esistono infatti per noi dipendenti ma solo collaboratori che si divertono perché lavorano con passione e condividono le proprie conoscenze realizzandosi sia professionalmente che umanamente. Soprattutto i giovani hanno un ruolo determinante. I giovani sono curiosi e hanno voglia di approfondire e sentono profondamente la voglia di cambiamento. La nostra attività ha bisogno di persone aperte e non pre-impostate: è per questo che scegliamo sempre giovani senza esperienza e l'età media dei nostri collaboratori (per metà laureati) è di 32 anni. Consideri che un tempo i giovani terminavano la loro carriera universitaria e poi venivano chiamati in azienda a lavorare. Oggi quelli che contribuiscono allo sviluppo del nuovo sono quei ragazzi che comunque parallelamente allo studio sono riusciti con curiosità ad avvicinarsi al mondo che li ospiterà da lavoratori della conoscenza.

Nonostante le problematiche e le difficoltà che si possono incontrare, è sempre necessario tenere presente che *se si sogna un progetto lo si può realizzare*. Ed è questo l'augurio che voglio fare a tutti i giovani.



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Original research papers

La famiglia fa male all'internazionalizzazione dell'impresa?

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Abstract

Obiettivo del paper: *L'obiettivo è comprendere l'influenza del ruolo della famiglia sul grado di internazionalizzazione di un'impresa già multinazionale grazie al framework teorico della socioemotional wealth.*

Metodologia: *I dati sono riferiti ad un campione rappresentativo di 293 imprese multinazionali italiane. Data la natura continua della variabile dipendente, rappresentata dal grado di internazionalizzazione, le stime sono state condotte servendosi di un modello di regressione lineare multipla che impiega, tra le variabili indipendenti, una definizione di impresa familiare multidimensionale.*

Risultati: *La proprietà familiare e la presenza in azienda di membri della famiglia con ruoli strategici inibiscono il processo di espansione globale, viceversa il coinvolgimento di giovani successori nel business stimola l'azienda a spingersi oltre i confini del mercato domestico.*

Limiti della ricerca: *Il campione è composto da sole imprese italiane.*

Implicazioni: *Le implicazioni sono sia manageriali sia di policy. Emerge la necessità da parte delle imprese familiari di aprirsi verso nuovi soci finanziatori e coinvolgere le nuove generazioni. Per quanto concerne le policy, opportuni incentivi andrebbero disegnati tenendo conto della struttura di governance.*

Originalità del paper: *In letteratura non sono stati trovati articoli che analizzano il grado di internazionalizzazione di imprese familiari, considerando peraltro una definizione multidimensionale della stessa.*

Parole chiave: impresa familiare; proprietà; governance; ricambio generazionale; internazionalizzazione

Purpose of the paper: *Our aim is to understand, thanks to socioemotional wealth, how family involvement in the business impact on the international expansion of a multinational firm.*

Methodology: *The sample is composed of 293 Italian multinational companies. Given the continuous nature of the dependent variable, represented by the degree of internationalization, we decided to adopt a multiple linear regression where the independent variable of family firms is a multidimensional one.*

Findings: *The involvement of the family in the ownership and in the board of directors is negatively associated with the level of internationalization. In contrast, the presence of successors favors the development of the business abroad.*

Research limitations: *The sample is composed only by Italian firms.*

Implications: *Both managerial and policy implication emerge. Family firms should consider to accept external equity shareholders and should involve successors*

in the business. Public incentive should be tailored to specific features, including the ownership structure and the managerial model at the parent company.

Originality of the paper: *To the best of our knowledge no paper analyzed the impact of family firms on the firm's degree of internationalisation.*

Key words: family business; ownership; governance; successor; internationalization

1. Introduzione¹

Le imprese familiari rivestono un ruolo fondamentale in pressoché tutti i paesi del mondo (Tapies e Ward, 2008). Le stime del Family Firm Institute consentono di affermare che due aziende al mondo su tre possono essere considerate imprese di famiglia. L'importanza di questa tipologia d'impresa è confermata anche se si focalizza l'attenzione sul solo contesto europeo e, in particolar modo, su quello italiano (Giacomelli e Trento, 2005 e Bianco *et al.*, 2005).

Lo scenario competitivo è mutato drasticamente negli ultimi anni a seguito dell'apertura di nuovi mercati e della maggiore integrazione tra i paesi (Kalburgi, 1995; Knight, 2000). L'ambiente competitivo entro il quale le imprese sono costrette ad operare sta assumendo sempre più connotati internazionali a causa delle forti pressioni competitive a cui esse sono soggette (Naldi e Nordqvist, 2008). Data la progressiva saturazione di molti mercati nei paesi avanzati, le occasioni di crescita a disposizione di un'impresa europea sono sempre più legate alla sua capacità di penetrazione nei mercati esteri. Nonostante ciò l'Italia è un paese ancora poco internazionalizzato soprattutto in termini di investimenti diretti esteri² (IDE) (Mariotti e Mutinelli, 2014) e non riesce a stare al passo con i principali competitors europei (UNCTAD, 2013). Inoltre la persistente bassa crescita dell'economia italiana fa sì che le strategie di internazionalizzazione siano questioni di estrema rilevanza (Tardivo e Cugno, 2011), il tema del resto suscita sempre più l'interesse anche dei ricercatori (Kontinen e Ojala, 2010). Non di meno l'internazionalizzazione è importante anche sotto il profilo dell'innovazione. Le imprese che hanno più successo sui mercati esteri sono spesso quelle che hanno maggiore capacità di innovare (Kafourous *et al.*, 2008; Filippetti *et al.*, 2009).

Per tutti questi motivi la ricerca proposta si focalizza sul processo di internazionalizzazione delle family business (FB) italiane. In particolare, ci si propone di analizzare l'impatto che la componente familiare ha sul grado di internazionalizzazione di un'impresa, inteso come l'impegno profuso all'estero da parte di imprese già multinazionali.

Il presente lavoro contribuisce a colmare il research gap presente nella letteratura sulle imprese familiari in diversi modi.

¹ Gli autori ringraziano Chiara Tomasi per i suggerimenti forniti su una versione precedente di questo lavoro; eventuali errori o imprecisioni sono da attribuirsi unicamente agli autori.

² Secondo la definizione del FMI e dell'OCSE è definito IDE l'investimento in un'impresa estera di cui l'investitore possiede almeno il 10% delle azioni ordinarie, con l'obiettivo di stabilire un interesse stabile nel paese, una relazione a lungo termine e una significativa influenza nella gestione dell'impresa.

In primis, mai prima d'ora è stata condotta una ricerca e quindi un'analisi empirica in merito ai processi strategici di crescita internazionale delle imprese familiari all'interno del framework teorico della socio-emotional wealth (SEW). È stato deciso infatti di adottare tale approccio teorico in quanto è ormai da tempo accettata e dimostrata la validità di tale teoria in ambito di scelte strategiche (Berrone *et al.*, 2012). Nelle imprese familiari preservare la SEW rappresenta un obiettivo imprescindibile (Gomez-Mejia *et al.*, 2007; Jones *et al.*, 2008; Cruz *et al.*, 2010; Breton-Miller e Miller, 2013) anche se spesso tale obiettivo va a collidere con obiettivi di natura prettamente economica (Zellweger *et al.*, 2012). In altre parole si ritiene che l'approccio secondo la SEW sia la prospettiva più adatta per apportare conoscenza nell'ambito della gestione dell'internazionalizzazione in quanto in grado di mettere in luce le peculiarità delle FB proprio grazie a considerazioni di carattere non prettamente economico.

In secondo luogo, analizzando i processi di espansione internazionale, processi che implicano necessariamente l'assunzione di scelte strategiche rischiose, si è in grado di capire e approfondire come e quanto il ruolo delle imprese familiari entri in generale nell'attuazione di scelte strategiche.

Terzo, il presente studio analizza separatamente l'effetto di tre diversi attributi in grado di caratterizzare le imprese come familiari, assumendo che il livello di allineamento con la definizione di impresa familiare può variare a seconda delle caratteristiche della stessa.

Il FB è divenuto un campo di ricerca autonomo a partire dai primi anni Novanta, tuttora, tuttavia, non esiste una definizione condivisa di tale fenomeno (Littunen e Hyrsky, 2000; Di Toma e Montanari, 2010). Autorevoli fonti concordano nel sostenere che un'opportuna definizione di FB non possa che essere multidimensionale (e.g. Chua *et al.*, 1999; Villalonga e Amit, 2006; Graves e Thomas, 2008), cioè strutturata in maniera tale da essere in grado di cogliere l'influenza della famiglia sull'attività d'impresa nelle sue molteplici sfumature. La nascita di questo recente filone di ricerca è naturalmente fondata sulla convinzione che le FB si differenzino dalle non family business (NFB) ed, in particolare, che il coinvolgimento della famiglia nell'attività d'impresa ne modifichi le caratteristiche e ne determini l'unicità (Sharma, 2004). La definizione di FB quindi deve essere in grado di cogliere tale differenza (Chua *et al.*, 2005). Numerose definizioni considerano gli assetti proprietari come aspetto discriminante. Secondo uno dei lavori di Gallo e Garcia Pont (1996) una FB può essere considerata tale solamente se una o al massimo due famiglie possiedono almeno una quota pari o superiore al 50% del capitale dell'impresa. Anche Littunen e Hyrsky (2000), in linea con Lee e Tan (2001), affermano che l'impresa di famiglia è quel business la cui proprietà appartiene alla famiglia. Altri autori definiscono il FB enfatizzando maggiormente la dimensione del family management, focalizzandosi dunque sulla presenza in ruoli gestionali chiave di uno o più membri della famiglia (Davis e Harveston, 2000; Tsang, 2001). Esistono inoltre definizioni che tengono in considerazione il ricambio generazionale, considerando dunque il FB come un'attività il cui possesso e la cui gestione sono destinate a passare nelle mani delle generazioni future (Cucculelli e Micucci, 2008).

Riassumendo, piuttosto che come categorie opposte, le FB e le NFB verranno quindi considerate come gli estremi di un continuum entro il quale il grado di appartenenza al modello family è determinato dall'interazione tra le dimensioni che modellano il comportamento aziendale (Bannò e Sgobbi, 2013). Coerentemente ci si propone di adottare una definizione operativa e multidimensionale che considera le seguenti dimensioni: grado di proprietà familiare, partecipazione di membri familiari alla gestione dell'impresa e presenza di giovani successori.

Da ultimo si argomentano le implicazioni manageriali e di policy che i risultati ottenuti sono in grado di offrire.

Le modalità secondo cui tali questioni vengono affrontate e il research gap viene colmato sono desumibili dalla struttura dell'articolo. Il paragrafo 1 propone una review della letteratura sul rapporto tra FB e processo di internazionalizzazione. Il paragrafo 2 è invece dedicato alle ipotesi di ricerca. Il paragrafo 3 è focalizzato sulla descrizione della metodologia adottata, mentre il successivo paragrafo 4 presenta i risultati dello studio. Nel paragrafo conclusivo sono infine riepilogati i principali risultati dell'analisi, nonché sono proposte le principali implicazioni manageriali e di *policy* e alcune riflessioni in merito ai possibili sviluppi futuri.

2. Family business e processo di internazionalizzazione: una rassegna della letteratura

Numerose ricerche empiriche dimostrano che il processo di internazionalizzazione delle FB si sviluppa in maniera diversa rispetto quello delle NFB (e.g. Fernandez e Nieto, 2006; Graves e Thomas 2006; Johanson e Vahlne, 2009). Tuttavia la letteratura è eterogenea riguardo alla valutazione dell'influenza esercitata dalla famiglia sull'espansione globale di un'impresa (Liang *et al.*, 2014; Pukall e Calabrò, 2013).

Da un lato, importanti studi dimostrano che le FB sono meno inclini ad intraprendere attività a livello internazionale poiché tendono a focalizzarsi maggiormente su operazioni che consentono di affermarsi nel mercato domestico (Johanson e Vahlne, 1977; Fernandez e Nieto, 2005).

D'altro canto, la capacità di un'impresa di intraprendere una strategia internazionale è condizionata fortemente dalla sua possibilità di accesso ai capitali (Goodstein e Boeker, 1991) e le FB sono spesso caratterizzate da limitate risorse finanziarie e da minore apertura verso finanziamenti esterni (Gallo e Garcia Pont, 1996).

Le ricerche di Graves e Thomas (2008) dimostrano che i fattori che riducono le possibilità di internazionalizzazione delle FB sono riconducibili, oltre che alla focalizzazione da parte dell'impresa sul business locale e all'assenza di adeguate disponibilità finanziarie, anche dal fatto che le FB sono restie ad assumere manager con esperienza internazionale e tendenzialmente desiderano mantenere la proprietà e la gestione dell'impresa nelle mani della famiglia proprietaria (Gallo e Sven, 1991). Okoroafo e Perry (2010) sostengono inoltre che esse sono meno capaci di monitorare regolarmente il mercato internazionale e di integrare

lo sviluppo all'interno del mercato domestico con le scelte di espansione globale.

La natura dinastica delle FB le rende più avverse al rischio rispetto alle NFB e ciò accrescerebbe la loro riluttanza a prendere parte a network con imprese straniere o ad esplorare mercati esteri ritenuti più rischiosi del mercato domestico. All'interno delle imprese familiari si sviluppano spesso relazioni fiduciarie forti tra i soci e tra questi e il management ma che possono ostacolare lo scambio di informazioni ed eventuali collegamenti con nuovi partner, indispensabili per intraprendere un progetto di espansione internazionale (Roessl, 2005). Anche Kontinen e Ojala (2010) ritengono che il network sociale di un'impresa sia correlato con la sua capacità di riconoscere e cogliere opportunità di crescita. Ciò è certamente legato al fatto che le FB desiderano perpetuare nel tempo i valori e la cultura aziendale, inevitabilmente modellata dall'influenza della famiglia (Zaniewska, 2012).

Allo stesso tempo però molti studi dimostrano che le family firms possiedono risorse e capacità uniche che consentono loro di essere efficaci in mercati diversi da quello domestico (Zahra, 2003).

In primo luogo, come sostenuto da Schulze *et al.* (2001) e Sirmon e Hitt (2003), le FB si caratterizzano per una visione di lungo periodo, soprattutto nel momento in cui sono chiamate a prendere decisioni rispetto ad investimenti che non danno i loro frutti nell'immediato, quale può essere per l'appunto l'apertura di un IDE.

Gallo e Garcia Pont (1996) affermano che il processo di internazionalizzazione delle FB sia stimolato anche dalla loro capacità di prendere decisioni in maniera tempestiva. Il continuo scambio di informazioni tra i membri della famiglia, accompagnato da un'intensa comunicazione tra gli stessi, può infatti costituire un elemento che stimola l'internazionalizzazione (Zaniewska, 2012). Zahra e Sharma (2004), e prima di loro James (1999), a tal proposito sostengono che il knowledge sharing all'interno della famiglia consente di creare, nel tempo, un clima di fiducia, che a sua volta stimola l'impresa ad intraprendere strategie anche rischiose.

Infine, la maggior parte della letteratura analizzata sostiene che anche il passaggio generazionale abbia un ruolo chiave. Fernandez e Nieto (2006) sostengono che le nuove generazioni siano impazienti di dimostrare le loro capacità manageriali ai loro predecessori e che, per fare ciò, siano fortemente propense ad adottare scelte orientate al cambiamento strategico, quale è l'internazionalizzazione. L'ingresso di giovani successori nella governance inoltre modifica la cultura organizzativa ed incoraggia l'impresa ad assumere rischi maggiori attraverso l'esplorazione di opportunità di crescita internazionali (Zahra, 2003). Anche Graves e Thomas (2008) sostengono che l'impegno profuso nell'attività di internazionalizzazione dipenda dalla vision e dalle qualità dei successori. Un'altra ragione per cui l'ingresso di giovani successori è da considerarsi come fattore con impatto positivo sulla propensione all'internazionalizzazione è da ricondursi al fatto che, attraverso l'istituzione di nuove sussidiarie, loro stessi siano in grado di crearsi nuovi o maggiori spazi entro i quali sviluppare le proprie idee di business e dunque crescere professionalmente (Fernandez e Nieto, 2005; Okoroafo e Perry, 2010).

3. Ipotesi di ricerca

Considerate le contrastanti evidenze empiriche emerse dalla review della letteratura e integrando tali evidenze all'interno della SEW, si prosegue formulando tre distinte ipotesi che argomentano in che modo le diverse dimensioni che caratterizzano le FB, cioè l'assetto proprietario, di governance e la presenza di giovani successori nell'attività dell'impresa, influenzano il grado di internazionalizzazione della stessa. In particolare, nel presente lavoro si ritiene che l'impiego della SEW possa far luce sui processi di crescita internazionale delle imprese familiari e sia in grado di dare chiarezza alle evidenze ancora discordi presenti in letteratura in quanto, in accordo con Berrone *et al.* (2012), la SEW "represents the single most important feature of a family firm's essence that separates it from other organizational forms".

L'assetto proprietario di un'impresa influenza in maniera significativa le scelte strategiche della stessa in modo particolare nella misura in cui le azioni conseguite sono in grado di intaccare il socioemotional endowment (Berrone *et al.*, 2012; Zahra, 1996). Qualora la famiglia si sentisse minacciata rispetto a tale endowment, questa sarà incline ad effettuare scelte che non necessariamente condurranno alla massimizzazione del profitto in quanto l'avversione al rischio della perdita dell'endowment è superiore all'avversione al rischio di natura finanziaria potenzialmente derivante, come nel nostro caso, dalla mancata crescita internazionale. Coerentemente la presenza della famiglia nella proprietà induce l'impresa ad evitare l'adozione di soluzioni che possano ridurre il controllo esercitato sul business e contestualmente incrementare il rischio, soluzioni quali appunto l'apertura di filiali estere (Casillas *et al.*, 2010; Zahra, 2005). Inoltre la presenza della proprietà nelle mani della famiglia porta l'impresa ad agire secondo una serie di routine, legate a loro volta a norme e valori consolidati nella SEW, i quali non necessariamente sono orientati al supporto di nuove strategie (Tushman e Romanelli, 1985). Un atteggiamento simile potrebbe limitare la capacità di rispondere tempestivamente all'esigenza di cambiamento e, più in generale, di cogliere nuove occasioni di crescita, quale potrebbe essere l'espansione internazionale (Bosi e Trento, 2012).

Al contrario un'alterazione dell'assetto proprietario potrebbe consentire all'impresa di accedere a nuove fonti di capitale (Naldi e Nordqvist, 2008), nonché di aprirsi a nuove opportunità strategiche prima non considerate (Salancik e Pfeffer, 1980). Più in generale una ridotta quota della famiglia nella partecipazione al capitale, può indurre la FB a migliorare le sue capacità di risposta rispetto ai cambiamenti competitivi imposti dal mercato. Per questo motivo si ritiene che la presenza di membri esterni alla famiglia all'interno dell'assetto proprietario possa influenzare positivamente l'attività internazionale (Naldi e Nordqvist, 2008) e viceversa la presenza della famiglia all'interno della proprietà limiti le possibilità dell'impresa di crescere in mercati diversi da quello domestico.

Coerentemente rispetto a quanto appena argomentato, la prima ipotesi può dunque essere formulata come segue:

Hp1: La proprietà familiare ha un impatto negativo sul grado di internazionalizzazione dell'impresa.

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La seconda dimensione considerata per caratterizzare una FB si riferisce alla sua struttura di governance, in particolare alla presenza di membri della famiglia che ricoprono ruoli di vertice all'interno dell'impresa.

In accordo con la letteratura relativa alla SEW, un Consiglio di Amministrazione (CdA) entro il quale sia presente una rappresentanza esterna prende decisioni in maniera diversa rispetto ad un organo formato esclusivamente da membri legati da vincoli familiari e quindi soggetti al socioemotional endowment (Berrone *et al.*, 2012; Goodstein e Boeker, 1991). In particolare la letteratura evidenzia come la presenza di membri esterni rappresenti un'importante risorsa per il processo strategico e decisionale di una FB (Fiegener *et al.*, 2000; Corbetta e Salvato, 2004). Quest'ultimi infatti non sono legati a vincoli familiari e ciò consente loro di valutare in maniera più libera ed autonoma le opportunità strategiche (Westphal, 1999). Viceversa numerose evidenze empiriche suggeriscono che il coinvolgimento della famiglia nel CdA limiti l'accesso a risorse strategiche per l'internazionalizzazione (Filatotchev *et al.*, 2007; Calabrò, Mussolino e Huse, 2009). Inoltre, è condiviso il fatto che una buona rappresentanza di membri esterni consenta all'impresa di beneficiare di una maggiore eterogeneità di risorse quali, per esempio, competenze, capacità, skills e informazioni le quali possono essere utilizzate come supporto al processo di internazionalizzazione (Fiegener *et al.*, 2000; Naldi e Nordqvist, 2008).

Riassumendo si ritiene che la presenza di manager non appartenenti alla famiglia stimoli il rinnovamento strategico e l'espansione internazionale (Salvato, 2004), viceversa che i membri familiari siano maggiormente orientati all'adozione di strategie di business più conservative (Claessens *et al.*, 2002).

Tenendo conto di tali considerazioni, viene formulata la seconda ipotesi:

Hp2: La presenza di membri familiari all'interno del CdA esercita un impatto negativo sul grado di internazionalizzazione dell'impresa.

La presenza di giovani eredi è ritenuta un'altra variabile di primaria importanza, poiché la successione diviene occasione di rinnovamento e, talvolta, discontinuità rispetto al passato. In particolare, in accordo con la SEW, le FB che sono orientate al lungo termine e che sono soggette al passaggio generazionale, saranno più propense ad investire in sviluppo di capitale umano, di competenze e ad effettuare investimenti importanti anche dal punto di vista finanziario, quali proprio gli IDE (Scholes *et al.*, 2015). Il passaggio generazionale arricchisce inoltre l'attività d'impresa e ne aumenta il valore (Astrachan *et al.*, 2002). Spesso l'ingresso di successori ha come conseguenza il perseguimento di nuove idee di business, e implica la messa in atto di un processo di delega di potere da parte dei proprietari dell'impresa (Sardeshmukh e Corbett, 2011). L'ingresso in azienda delle nuove generazioni incoraggia dunque l'impresa ad assumersi nuovi rischi (Zahra, 2003). Le nuove generazioni, inoltre, sono maggiormente propense all'assunzione di professionisti e manager esterni (Graves e Thomas, 2008)

che, come precedentemente affermato, sono fonte di risorse fondamentali per intraprendere con successo un percorso di espansione internazionale. È infine interessante ricordare come solitamente i giovani eredi desiderino dimostrare le loro abilità manageriali, nonché sviluppare il proprio profilo professionale (Fernandez e Nieto, 2006) e che, per queste motivazioni, sono orientati ad espandere l'attività di famiglia al fine di creare nuovi spazi entro i quali sperimentare idee e strategie innovative (Fernandez e Nieto, 2005; Okoroafo e Perry, 2010).

È dunque coerente supporre che la presenza di giovani successori in azienda sia di stimolo per lo sviluppo internazionale della stessa. Coerentemente la terza e ultima ipotesi è formulata come segue:

Hp3: La presenza di giovani successori esercita un impatto positivo sul grado di internazionalizzazione dell'impresa.

Riassumendo, si ritiene che le tre diverse dimensioni considerate per la definizione delle FB influiscano in modo differente sul grado di internazionalizzazione di un'impresa.

4. Metodologia: il modello concettuale e le misure adottate

4.1 Il modello

Nel corso degli anni sono sorte numerose discussioni rispetto alla modalità più appropriata per misurare il grado di internazionalizzazione di un'impresa (Reuber e Fisher, 1997). Per esempio, Dunning e Pearce (1981) hanno sviluppato un indice monodimensionale basato sulle vendite delle imprese più tardi ampliato da Dunning (1996) che ha creato un indicatore basato su attività, dipendenti e spesa in ricerca e sviluppo. Sullivan (1994) ha invece costruito un indice che tiene in considerazione cinque dimensioni, cioè le vendite, i profitti, gli asset aziendali, l'esperienza internazionale del management e il grado di dispersione delle attività internazionali. Infine Tallman e Li (1996) suggeriscono di usare il numero di nazioni in cui le imprese operano. Alla luce di tali considerazioni, la ricerca si propone di misurare il grado di internazionalizzazione definendo lo stesso in tre diversi modi e identificando quindi tre diversi modelli così da garantire risultati econometrici robusti. Le tre variabili sono rispettivamente: per il Modello 1 il rapporto tra il numero di occupati all'estero e il numero di dipendenti in Italia (Grado_itz_addetti), per il Modello 2 il rapporto tra il fatturato all'estero e il fatturato in Italia (Grado_itz_fatturato), infine per il Modello 3 il numero di Paesi in cui l'impresa opera tramite IDE (Grado_itz_paesi). Considerando la natura continua delle tre variabili dipendenti le stime econometriche sono state condotte servendosi di un modello di regressione lineare multipla.

I modelli quindi valutano l'impatto delle dimensioni che definiscono le FB, cioè la quota di equity posseduta dalla famiglia (Proprietà_familiare), la presenza di membri familiari con ruoli strategici (Esponenti_familiari) e il coinvolgimento di giovani successori nell'attività d'impresa

(Successori), sul grado di internazionalizzazione calcolato grazie alle tre diverse misure. I modelli possono essere sintetizzati nel modo seguente:

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Modello 1: $\text{Grado_itz_addetti} = f(\text{Proprietà_familiare}; \text{Esponenti_familiari}; \text{Successori}; \text{Variabili di controllo})$

Modello 2: $\text{Grado_itz_fatturato} = f(\text{Proprietà_familiare}; \text{Esponenti_familiari}; \text{Successori}; \text{Variabili di controllo})$

Modello 3: $\text{Grado_itz_paesi} = f(\text{Proprietà_familiare}; \text{Esponenti_familiari}; \text{Successori}; \text{Variabili di controllo})$

4.2 Le variabili indipendenti

Come precedentemente anticipato, le variabili indipendenti che rappresentano il concetto di FB sono il grado di proprietà familiare (Proprietà_familiare), la presenza di membri della famiglia con ruoli strategici (Esponenti_familiari) ed, infine, il coinvolgimento di giovani eredi (Successori).

Sono state quindi incluse nell'analisi le variabili di controllo che si ritiene possano influenzare l'attività internazionale di un'impresa. In primo luogo si ritiene che un'azienda matura sia più propensa e preparata ad attrezzarsi per intraprendere un percorso internazionale poiché in possesso di maggiore esperienza ed informazioni (Zahra, 2003). La variabile introdotta per misurare l'esperienza è l'età aziendale (Età). Sono state incluse nell'analisi due variabili proxy della capacità manageriale dell'impresa, elemento che certamente ne influenza il processo di internazionalizzazione (Dunning e Lundan, 2008). Ci si riferisce alle variabili relative alla quotazione (Quotata_borsa) ed alla dimensione (Dipendenti). Poiché è dimostrato che esiste una relazione positiva tra *performance* e internazionalizzazione (Lu e Beamish, 2001), è stata introdotta la redditività dell'impresa misurata dal rendimento dei dipendenti (Rendimento_dipendenti). L'analisi tiene quindi in considerazione i vincoli finanziari (Indice_liquidità) a cui un'azienda è sottoposta, è infatti evidente che il possesso di capitali adeguati sia indispensabile per intraprendere un processo di espansione oltre i confini domestici (Goodstein e Boeker, 1991). La capacità innovativa dell'impresa è definita attraverso la sua attività brevettuale (Brevetti). Alla luce dei risultati degli studi di Kotabe *et al.* (2002) e Kafouros *et al.* (2008), che dimostrano l'esistenza di una relazione di reciproca influenza tra il processo di internazionalizzazione e quello di innovazione, si ritiene fondamentale l'inclusione di tale elemento nell'analisi. Si considera che un'altra variabile di primaria importanza sia rappresentata dal numero di IDE di un'impresa (IDE), per definizione rappresentativo dell'impegno internazionale della stessa. L'analisi include infine variabili relative al settore³ (Settori) di

³ I settori considerati sono: servizi di telecomunicazione e informatica, costruzioni, servizi, industria mineraria e metallurgica, *made in Italy* (abbigliamento, moda, tessile, alimentari e bevande), chimica-farmaceutica, settore automobilistico, settore degli elettrodomestici, elettronica ed elettromeccanica, prodotti in metallo, energia e petrolio.

appartenenza delle imprese (Villalonga e Amit, 2006) e alla localizzazione geografica della casa madre (Loc_geo).

Per la descrizione puntuale delle variabili e delle fonti si rimanda alla Tabella 1.

4.3 Analisi descrittiva del campione utilizzato

Il campione, composto da 293 aziende multinazionali, è stato selezionato in modo casuale ed è costituito da dati aggiornati al 2012. Al fine di validare la rappresentatività di tale campione sono stati condotti *test* di rappresentatività rispetto all'universo delle multinazionali italiane. Si vuole sottolineare ancora una volta che il campione è rappresentato da sole imprese internazionalizzate, essendo l'obiettivo di questa ricerca quello di capire se le FB siano caratterizzate da un grado di internazionalizzazione maggiore rispetto alle NFB.

Al fine di condurre una analisi descrittiva che potesse evidenziare delle prime differenze tra le imprese FB e le NFB si è deciso di adottare la definizione operativa di family business basata sul grado di proprietà. Tale scelta consente di distribuire le imprese in maniera coerente rispetto a quella che è l'effettiva situazione italiana poiché circa l'80% delle imprese nazionali sono familiari. Inoltre, il criterio che si serve della proprietà è quello prevalentemente utilizzato in letteratura (e.g. Gallo, 1995; Littunen e Hyrsky, 2000; Lee e Tan, 2001). La tabella 2 riporta quindi le statistiche descrittive per l'intero campione e per i due sottocampioni di imprese FB e NFB identificate in base al criterio appena esposto.

Emerge chiaramente come il grado di internazionalizzazione sia significativamente maggiore per le NFB comunque questo venga misurato. I risultati presenti nella seconda sezione della tabella consentono di rilevare che in oltre la metà dei casi il CdA di una FB è composto per la maggioranza da membri familiari, allo stesso modo si rileva una importante presenza di successori. L'ultima sezione della tabella riporta i risultati riferiti alle variabili di controllo. Nonostante le FB abbiano un'età superiore rispetto alle NFB, la differenza tra i due valori medi è minima, pari a circa tre anni. La percentuale di aziende quotate è minore per la categoria delle FB che si dimostrano essere più riluttanti ad intraprendere tale percorso di quotazione in borsa poiché attente ad evitare scelte che potrebbero pregiudicare il controllo esercitato dalla famiglia sul business (Boeker e Karichalil, 2002). In media, le imprese non familiari impiegano 1.450 dipendenti, quasi il triplo rispetto agli occupati dalle FB. Viceversa il rendimento degli addetti, non risulta essere significativamente differente ancorché maggiore per le FB. Allo stesso modo anche l'indice di liquidità, il numero di brevetti e di IDE non mostrano una differenza statisticamente significativa tra i due gruppi di imprese.

Tab. 1: Definizione e fonte delle variabili

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Variabile	Definizione	Fonte
<i>Variabile dipendente</i>		
Grado_itz_addetti	Rapporto tra il numero di addetti impiegati all'estero e il numero di occupati in Italia.	REPRINT*/ AIDA
Grado_itz_fatturato	Rapporto tra il fatturato all'estero e il fatturato in Italia.	REPRINT/ AIDA
Grado_itz_paesi	Numero di Paesi in cui l'impresa opera tramite IDE.	REPRINT
<i>Family business</i>		
Proprietà_familiare	Variabile dummy uguale a 1 se l'impresa non è quotata e la proprietà familiare supera la soglia del 50% o se l'impresa è quotata e la proprietà familiare supera il 20%, 0 altrimenti.	AIDA
Esponenti_familiari	Variabile dummy uguale a 1 se la maggioranza dei membri del CdA sono esponenti della famiglia, 0 altrimenti.	AIDA
Successori	Variabile dummy uguale a 1 se nella gestione dell'impresa è coinvolto almeno un giovane successore, 0 altrimenti.	AIDA
<i>Variabili di controllo</i>		
Età	Età dell'impresa.	AIDA
Quotata_borsa	Variabile dummy uguale a 1 se l'azienda è quotata, 0 altrimenti.	Borsa Italiana
Dipendenti	Logaritmo del numero di addetti.	AIDA
Rendimento_dipendenti	Logaritmo del rendimento dei dipendenti, calcolato come rapporto tra fatturato e costo del lavoro.	AIDA
Indice_liquidità	Indice di liquidità, calcolato come rapporto tra l'attivo circolante diminuito delle rimanenze di magazzino e i debiti a breve.	AIDA
Brevetti	Logaritmo del numero di brevetti posseduti dalla casa madre.	Espacenet
IDE	Numero di IDE.	REPRINT
Settori	Variabile dummy uguale a 1 se l'azienda opera in un determinato settore, 0 altrimenti.	REPRINT
Loc_geo	Variabile dummy che indica la localizzazione geografica, rispettivamente se le sedi sono localizzate nel nord, centro o sud Italia.	AIDA

* Per una descrizione di tale banca dati si rimanda a Mariotti e Mutinelli, 2014

Fonte: ns elaborazione

Tab. 2: Confronto tra FB e NFB – Valori medi

Variabile	Media/% intero campione (293 imprese)	Media/% FB (214 imprese)	Media/% NFB (79 imprese)	Differenza	Sign
Grado_itz_addetti ^{a)}	8.00	3.36	20.55	-17.18	**
Grado_itz_fatturato ^{a)}	7.49	3.49	18.32	-14.83	***
Grado_itz_paesia)	8	7	13	-8	***
<i>Family business</i>					
Esponenti_familiari ^{b)}	40.3%	53.7%	3.8%	49.9%	***
Successori ^{b)}	38.2%	47.2%	13.9%	33.2%	***
<i>Variabili di controllo</i>					
Età ^{a)}	57.71	58.47	55.64	2.83	*
Quotata_borsa ^{b)}	41.6%	38.3%	50.6%	-12.3%	*
Dipendenti ^{a)}	2.27	2.19	2.47	-0.28	**
R e n d i m e n t o _ dipendenti ^{a)}	0.76	0.78	0.71	0.07	
Indice_liquidità ^{a)}	1.22	1.23	1.18	0.04	
Brevetti ^{a)}	0.84	0.81	0.89	-0.11	
IDE ^{a)}	14.42	12.50	19.60	-7.10	
<i>Settori^{b)}</i>					
Servizi TLC e informatica	5.1%	2.8%	11.4%	-8.6%	**
Costruzioni	6.8%	7.9%	3.8%	4.1%	
Servizi	7.5%	6.1%	11.4%	-5.3%	
Industria mineraria e metallurgica	5.8%	7.5%	1.3%	6.2%	**
Made in Italy	17.4%	20.6%	8.9%	11.7%	**
Chimica-farmaceutica	8.5%	8.9%	7.6%	1.3%	
Settore automobilistico	6.1%	6.1%	6.3%	-0.2%	
Settore degli elettrodomestici	1.7%	1.4%	2.5%	-1.1%	
Elettronica ed elettromeccanica	28.3%	27.6%	30.4%	-2.8%	
Prodotti in metallo	8.9%	9.3%	7.6%	1.7%	
Energia e petrolio	3.8%	1.8%	8.8%	-7.0%	*
<i>Loc_geo^{b)}</i>					
Nord	89.8%	92.5%	82.3%	10.2%	**
Centro	9.2%	7.0%	15.2%	-8.2%	**
Sud	1.0%	0.5%	2.5%	-2.0%	

^{a)}T-test

^{b)}Proportion test

* significatività: al livello del 10%; **al livello del 5%; *** al livello del 1%.

Fonte: ns elaborazione

5. Risultati

Mariasole Bannò
Elisa Pozza
Sandro Trento
La famiglia fa male
all'internazionalizzazione
dell'impresa?

Tutte e tre le ipotesi formulate sono state confermate⁴.

In particolare, coerentemente rispetto a quanto affermato da altri ricercatori (Graves, e Thomas, 2008; Naldi e Nordqvist, 2008), i risultati delle stime (Tabella 3) dimostrano che la concentrazione della proprietà nelle mani della famiglia ha un'influenza negativa sul grado di internazionalizzazione (il coefficiente della variabile Proprietà_familiare è negativo e significativamente diverso da zero per $p < 0.05$ nel Modello 1 e 2 e per $p < 0.01$ nel Modello 3).

Tale risultato è sostenuto da diverse motivazioni tutte riconducibili alla SEW.

In primo luogo, le family owned firms sono restie alla cessione di controllo e all'assunzione di manager esterni (Boeker, e Karichalil, 2002), considerati importante fonte di skills ed informazioni (Fiegener *et al.*, 2000; Corbetta, e Salvato, 2004; Naldi, e Nordqvist, 2008).

Inoltre la mancata apertura nei confronti di nuovi soci finanziatori limita le fonti di capitale a disposizione dell'impresa (Naldi, e Nordqvist, 2008), anch'esse indispensabili per intraprendere e sostenere un percorso di crescita internazionale.

Il segno negativo del coefficiente della variabile Esponenti_familiari (significativamente diverso da zero per $p < 0.05$ nel Modello 1 e per $p < 0.10$ nel Modello 2) dimostra che la presenza di familiari con ruoli strategici all'interno dell'azienda inibisce il livello di internazionalizzazione.

Ciò conferma quanto affermato in letteratura, la quale dimostra come il coinvolgimento della famiglia nel CdA sia un limite per l'accesso a importanti capacità e competenze, fondamentali invece per lo sviluppo di un processo di espansione oltre i confini domestici (Filatotchev *et al.*, 2007; Calabrò *et al.*, 2009).

La governance familiare non influisce invece sul grado di internazionalizzazione misurato tramite il numero di Paesi in cui l'impresa opera (il coefficiente della variabile Esponenti_familiari non è significativamente diverso da zero nel Modello 3).

Al contrario, il coinvolgimento di giovani successori all'interno del business stimola l'attività internazionale di un'impresa (il coefficiente della variabile Successori è positivo e significativamente diverso da zero per $p < 0.10$ nel Modello 1 e per $p < 0.05$ nel Modello 3).

In accordo con la SEW, la propensione e la capacità dell'impresa di assumere nuovi rischi appare essere legata alla presenza di giovani successori in azienda che tendenzialmente favoriscono l'ingresso di membri esterni con ruoli strategici (Okoraifo, 1999; Zahra, 2003; Fernandez, e Nieto, 2006).

⁴ La matrice di correlazione, disponibile su richiesta, riporta valori accettabili.

Tab. 3: Output del modello di regressione

	MODELLO 1			MODELLO 2			MODELLO 3		
	Grado_itz _addetti			Grado_itz _fatturato			Grado_itz _paesi		
			Std. Err.			Std. Err.			Std. Err.
<i>Family business</i>									
Proprietà_familiare	-23.02	**	9.61	-14.67	**	5.71	-2.73	***	1.01
Esponenti_familiari	-25.20	**	10.55	-9.08	*	6.36	-0.77		1.12
Successori	14.42	*	7.79	2.42		4.73	1.90	**	0.83
<i>Variabili di controllo</i>									
Età	0.15		0.10	0.02		0.06	-0.01		0.01
Quotata_borsa	-13.33		10.20	1.98		6.04	0.46		1.07
Dipendenti	-38.31	***	6.99	-23.40	***	4.21	-0.37		0.74
Rendimento_dipendenti	12.29		11.41	-8.84		6.95	1.50		1.23
Indice_liquidità	11.14	***	3.58	4.70	**	2.12	0.32		0.37
Brevetti	17.55	***	5.51	6.49	*	3.34	1.43	**	0.59
IDE	0.29	**	0.12	0.21	***	0.07	0.45	***	0.01
Settori ^{a)}	si			si			si		
<i>Loc_geo^{b)}</i>									
Nord	1.07		13.40	-9.50		8.11	-1.81		1.43
Sud	18.42		37.88	-9.56		22.92	-3.14		4.05

* significatività: al livello del 10%; **al livello del 5%; *** al livello del 1%.

^{a)} Livello base: energia e petrolio. ^{b)} Livello base: centro.

Fonte: ns elaborazione

Anche l'esame dei coefficienti associati alle variabili di controllo mostra interessanti risultati. L'età dell'impresa non ha rilevanza statistica in nessuno dei tre modelli. Tale risultato potrebbe suggerire che l'esperienza posseduta dalle aziende che sono presenti sul mercato da tempo sia compensata dalla dinamicità che spesso caratterizza le aziende più giovani. Per come sono costruite le variabili dipendenti dei Modelli 1 e 2, la dimensione ha un impatto negativo (il coefficiente della variabile Dipendenti è significativamente diverso da zero per $p < 0.01$ nei Modelli 1 e 2) mentre la quotazione non è mai statisticamente significativa. Anche il rendimento dei dipendenti non esercita nessun impatto. Al contrario, il coefficiente positivo della variabile Indice_liquidità (statisticamente diverso da zero per $p < 0.01$ nel Modello 1 e per $p < 0.05$ nel Modello 2) dimostra che la disponibilità di capitali ha rilevanza nella crescita internazionale di un'impresa. Allo stesso modo, in linea con le aspettative, i risultati mostrano che anche le attività innovative di un'impresa sono uno stimolo per l'espansione internazionale comunque questa venga misurata. La variabile Brevetti ha infatti coefficiente positivo (significativamente diverso da zero per $p < 0.01$ nel Modello 1, per $p < 0.10$ nel Modello 2 e per $p < 0.05$ nel Modello 3). Nello specifico, la capacità innovativa di un'azienda permette di sviluppare nuovi prodotti o servizi che possono essere venduti oltre i confini nazionali e che quindi consentono all'impresa stessa di sostenere la propria attività all'estero (Filipescu *et al.*, 2009). Anche il

numero di IDE ha un impatto positivo sul grado di internazionalizzazione (il coefficiente della variabile IDE è significativamente diverso da zero per $p < 0.05$ nel Modello 1 e per $p < 0.01$ nel Modello 2 e 3). Tale risultato non deve essere considerato ovvio, non necessariamente infatti esiste una relazione lineare tra il numero di sussidiarie controllate da una casa madre e lo sforzo estero profuso da quest'ultima, misurato appunto nei termini secondo i quali sono state definite le variabili dipendenti.

Solo alcuni dei coefficienti associati alle *dummy* che consentono di definire il settore entro il quale opera l'impresa sono statisticamente significativi. Infine il coefficiente associato alla variabile Loc-geo non ha rilevanza statistica in nessuno dei tre modelli stimati.

6. Conclusioni e sviluppi futuri

L'analisi empirica offre risultati che paiono assumere rilievo nel panorama della letteratura delle FB ed, in particolare, di quella focalizzata sul processo di internazionalizzazione delle stesse. I risultati raggiunti suggeriscono che i vari indicatori di cui ci si è serviti per definire le imprese di famiglia non esercitano la stessa influenza sul grado di internazionalizzazione. In particolare, mentre la proprietà familiare e la presenza in azienda di membri della famiglia con ruoli strategici sembrano frenare l'attività internazionale, il coinvolgimento di giovani successori nel business sembra essere, al contrario, uno stimolo per l'espansione oltre i confini domestici.

Tali risultati, di natura econometrica, possono suggerire implicazioni manageriali.

Nell'attuale scenario competitivo, la capacità di espandere la propria attività oltre i confini nazionali è fondamentale non solo per crescere, ma spesso per sopravvivere (Naldi e Nordqvist, 2008). Le famiglie a capo di un'impresa dovrebbero tenere ben presente tale aspetto, considerando l'eventualità di aprirsi sia nei confronti di nuovi soci finanziatori, sia favorendo l'ingresso di membri esterni all'interno del CdA sia del *team* manageriale nonostante il comprovato obiettivo di voler mantenere il *socioemotional endowment*. Allo stesso modo sarebbe auspicabile coinvolgere le nuove generazioni, soprattutto considerando il fatto che, in Italia, il passaggio generazionale è un momento molto delicato nella vita dell'impresa (Pellegrini, Ciappei e Cannoni, 2012). Infatti solamente il 50% delle imprese riesce a sopravvivere allo scoglio del primo passaggio di testimone e solo il 15% è in grado di superare il secondo. Il precoce ingresso in azienda di giovani successori, oltre a favorire la formazione sul campo degli stessi ed a stimolare un'adeguata pianificazione della successione, potrebbe favorire l'espansione del business all'estero. Considerato quindi che, proprio in questi anni, un'intera generazione sta lentamente uscendo dall'azienda per lasciare il testimone ai propri eredi (Trento, 2008), è necessario cogliere con consapevolezza e decisione quest'occasione di rinnovamento. Le nuove generazioni, come emerso sia dalla *review* sia dai risultati della presente ricerca, sono fonte di discontinuità poiché portatori di novità. È quindi necessario supportare l'entusiasmo dei successori da poco entrati in azienda o prossimi all'ingresso per favorirli nell'interazione

e nella collaborazione con manager di professione, la quale interazione non può che favorire la separazione tra proprietà e controllo che nello specifico sembra essere proprio la causa della mancata crescita sui mercati internazionali. Contrastare la paralisi che caratterizza gli assetti proprietari della maggioranza delle imprese soprattutto italiane, potrebbe quindi essere il primo passo per sostenere una crescita dimensionale, sia domestica sia internazionale.

Come già affermato, eventuali modifiche nella struttura organizzativa devono però essere affiancate da una maggiore capacità di reperimento di risorse finanziarie oltre che manageriali (Bianco *et al.*, 2005) poiché incrementando la sua scala, l'impresa necessita di più capitali da destinare ai nuovi investimenti siano essi nazionali o esteri (Bosi e Trento, 2012). L'azienda deve essere disposta e pronta all'ingresso di nuovi soci finanziatori, anche esterni alla famiglia. Si auspica che il processo appena descritto venga innescato ed intrapreso anche grazie al passaggio generazionale in corso pur ricordando che la sua realizzazione non è immediata e tanto meno priva di ostacoli in quanto richiede un cambiamento culturale di ingente portata. L'evoluzione del contesto competitivo internazionale impone infatti agli imprenditori delle FB di rivedere le proprie strategie, modificando in parte anche i valori alla base di queste ultime. In particolare, i processi di globalizzazione hanno evidenziato i limiti del modello individualista, che spinge l'imprenditore a governare direttamente il funzionamento delle diverse unità organizzative aziendali (Spigarelli, 2003). L'articolazione e l'eterogeneità dell'ambiente internazionale rispetto ai mercati locali da un lato richiedono processi di delega decisionale capaci di valorizzare il contributo collettivo a problemi complessi, dall'altro impongono di affiancare all'intuizione imprenditoriale interventi di razionalizzazione dei processi aziendali. Diventa allora fondamentale, anche per l'imprenditore della FB, circondarsi di collaboratori validi, capaci di cogliere le opportunità per incrementare l'efficienza, stimolare i processi innovativi, gestire il cambiamento tecnologico e organizzativo e coordinare flussi fisici e informativi fra filiale estera e casa madre (McDougall e Oviatt, 2000; Lamb e Liesch, 2002).

È a questo punto importante che a tale percorso si affianchino adeguati incentivi volti a supportare il processo di espansione internazionale delle imprese italiane. La competitività internazionale di un territorio rappresenta infatti uno degli obiettivi fondamentali della politica economica (Dunning e Lundan, 2008). Gli interventi a sostegno in tal senso hanno assunto negli ultimi venti anni un ruolo cruciale e strategico sempre maggiore al fine di colmare il *gap* che affligge l'Italia nei confronti degli altri Paesi. In questo contesto le evidenze emerse dalla presente ricerca possono servire come prima base per una riflessione sul tipo di incentivi pubblici da impiegare. Di solito, infatti, gli incentivi sono tarati sulla dimensione dell'impresa e, viceversa, trascurano le strutture di governance e le loro caratteristiche (Bannò *et al.*, 2014; 2015). Il presente lavoro tuttavia sembra indicare che il grado di espansione globale di un'impresa dipende in via rilevante dall'elemento family. L'impresa familiare in effetti necessita di sostegni, in quanto, come più volte ribadito, tende ad autofinanziarsi e ad opporsi

all'adozione di soluzioni che compromettano il controllo familiare e, anche per queste ragioni, la sua crescita ne risulta compromessa.

La ricerca condotta non è naturalmente priva di limiti.

Poiché le dimensioni utilizzate per definire le FB hanno diverso impatto sul processo di internazionalizzazione, sarebbe interessante estendere l'analisi introducendo nuovi elementi, fra i quali per esempio la cultura organizzativa (Zahra *et al.*, 2004).

Visto il ruolo fondamentale ricoperto dai giovani successori nel processo di sviluppo potrebbe inoltre essere utile verificare con maggiore profondità il ruolo degli eredi raccogliendo ulteriori informazioni. Il successo di un'impresa è legato alla qualità del capitale umano dei suoi dipendenti, dunque la possibilità che i giovani successori rappresentino effettivamente un'occasione di crescita e rinnovamento potrebbe dipendere dal loro grado e tipo di istruzione, nonché dall'effettiva esperienza maturata in azienda.

È infine importante sottolineare come la lettura dei risultati non possa prescindere dalla considerazione che il campione di imprese utilizzato è costituito da sole aziende italiane, il cui processo di espansione internazionale presenta specifiche peculiarità (Musso, 2006). Oltre a lavorare per ampliare il campione di cui ci si è serviti, si ritiene necessario lo sviluppo di nuove ricerche, volte allo studio delle FB presenti in altre nazioni, anche in chiave comparata.

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La percezione della web atmosphere tra i visitatori del centro commerciale

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Abstract

Obiettivo del paper: Il paper analizza le variabili della websiteatmosphere utilizzabili nella progettazione del sito web di un centro commerciale ed approfondisce l'importanza dei diversi attributi assumendo la prospettiva del potenziale utente ed i suoi atteggiamenti nei confronti del format.

Metodologia: Il lavoro si basa su un'indagine empirica, condotta tramite questionario, rivolta ad un campione di 438 studenti universitari, di età compresa tra i 18 e 30 anni.

Risultati: L'indagine rivela l'esistenza di atteggiamenti diversi degli utenti nei confronti della web atmosphere a seconda del comportamento di shopping prevalente ed un'attenzione diffusa verso gli attributi social del sito web che favoriscono l'interattività.

Limiti della ricerca: Il campione indagato è composto da soli studenti universitari con uno stile di vita particolare. In futuro, si ritiene necessario estendere l'indagine ad una popolazione più ampia e prendere in considerazione anche la prospettiva dell'impresa commerciale.

Implicazioni pratiche: Investimenti online mirati a rafforzare la presenza e le promozioni sui social network ed altri strumenti di comunicazione interattiva (forum, chat...) potrebbero costituire efficaci leve per incrementare l'attrattività del sito web e rafforzare i processi di fidelizzazione.

Originalità del paper: In letteratura non si riscontrano modelli di websiteatmosphere specificatamente riferiti agli shopping center (e più in generale al contesto retail). Inoltre, il contributo focalizza l'attenzione sulla dimensione social della web atmosphere, anch'essa meno esplorata in letteratura.

Parole chiave: web atmosphere; web marketing; marketing esperienziale; centro commerciale

Purpose of the paper: The paper focuses on the analysis of atmospheric cues of shopping center' websites. The aim of the study is to understand the importance of different atmospherics, by considering the customer perspective and his/her attitude towards a shopping center.

Methodology: The research is based on a survey carried out on a sample of 438 college students, aged between 18 and 30 years.

Findings: Findings reveal that customers with different shopping center's attitudes give different importance to the atmospheric cues. Moreover respondents usually give a lot of importance to websiteattributes that promote social interactivity.

Research limits: The sample includes only students having similar lifestyle. It seems necessary to extend the investigation to a wider population and to take into

account also the retailer's perspective in order to better analyze the management of online atmosphere.

Practical implications: Online investment aimed at strengthening the presence and promotions on social networks and other interactive applications (forum, chat ...) could be helpful to increase the website attractiveness and to improve the customers' retention.

Originality: Literature on website atmosphere applied to the shopping centers (and in general to the retail sector) is very limited. Moreover, this contribution focuses on the social dimension of the website atmosphere, that was little explored in past studies.

Key words: web atmosphere; web marketing; experiential marketing; shopping center

1. Introduzione¹

Il sito *web* aziendale è uno strumento di comunicazione molto importante per raggiungere il consumatore e sempre più spesso diviene un canale di vendita alternativo o parallelo alla distribuzione tradizionale (Barlow *et al.*, 2004; Eurostat, 2014). Ne consegue la necessità di progettare siti *web* efficaci ed attraenti sia sotto il profilo comunicativo/relazionale che commerciale.

La letteratura internazionale è ricca di contributi che affrontano il tema della "qualità" di un sito *web*, comunemente identificata con dei costrutti multidimensionali, la cui definizione varia a seconda delle categorie di prodotto e dei settori presi in considerazione (Aladwani e Plavia, 2002).

In questo lavoro, il concetto di *websitequality* viene riferito alla *Web Atmosphere* (WA), intesa come l'insieme degli elementi del sito *web* la cui progettazione può determinare effetti sugli utenti, sia in termini emozionali che comportamentali (Dailey, 2004). Il contesto di analisi è quello distributivo, riguardando, in particolare, il *format* dei centri commerciali.

La ricerca ha per oggetto lo studio delle variabili della WA (c.d. *atmospherics*) utilizzabili nella progettazione del sito *web* di un centro commerciale e vuole approfondire quali attributi sono più rilevanti assumendo la prospettiva del potenziale utente. Il quesito che ci si pone, in particolare, è il seguente: in che modo gli atteggiamenti degli utenti nei confronti del centro commerciale possono condizionare le finalità per cui il sito *web* viene utilizzato e, di conseguenza, gli elementi di quest'ultimo dai quali si è maggiormente attratti?

Le motivazioni dello studio sono diverse.

Sebbene il tema del *web design* applicato al contesto *retail* abbia ricevuto crescente attenzione in letteratura (Kim e Stoel, 2004; Nikolaeva, 2006; Wang *et al.*, 2007; Dawson e Kim, 2010; Ainsworth e Ballantine, 2014; Molla-Descals *et al.*, 2014), gli studi focalizzati sui centri commerciali sono limitati. Nondimeno, il sito *web* presenta grandi potenzialità per tali

¹ I risultati preliminari di questa ricerca sono stati presentati in occasione dell'XI Convegno Annuale della Società Italiana Marketing (Cfr. Cioppi e Savelli, 2014).

strutture, sia in termini di obiettivi che di contenuti comunicazionali. Oltre alla funzione informativa, il sito potrebbe svolgere un importante ruolo di attrazione al punto vendita fisico. Favorendo la condivisione dei contenuti e l'interattività il sito comunica, infatti, meglio di altri strumenti, il carattere emozionale ed intrattenitivo su cui si basa la distintività del *format* (Banerjee, 2012). La sua navigazione potrebbe, pertanto, incrementare il desiderio e la curiosità degli utenti di visitare la struttura fisica. In aggiunta, poiché Internet possiede, di per sé, una forte connotazione intrattenitiva, una progettazione adeguata del sito *web* potrebbe essere complementare rispetto all'offerta complessiva di entertainment del centro commerciale (Kim, 2002), contribuendo ad arricchire la sua funzione sociale e relazionale. La criticità del sito *web* per i centri commerciali emerge anche considerando alcune ricerche che hanno approfondito il fenomeno dello sviluppo degli *shopping center online* (Shim e Suh, 2010; Kwon *et al.*, 2014). Ahn, Seewon e Ingoo (2004) rilevano l'importanza, anche per le strutture tradizionali, di gestire efficacemente il sito *web* in modo da affrontare al meglio la competizione dei centri virtuali, il cui sito tende ad essere molto curato e ben strutturato. Shim e Suh (2010) suggeriscono, invece, l'importanza di un'adeguata gestione del sito *web* per supportare le attività di analisi della domanda e di gestione delle relazioni.

Nonostante queste potenzialità, il sito *web* di molti centri commerciali è statico e semplice, assolvendo un ruolo di mera vetrina informativa, attraverso cui si comunica il proprio posizionamento, i giorni e gli orari di apertura ed i negozi presenti all'interno della struttura (CNCC, 2015).

Nasce da qui l'interesse di questa ricerca e la volontà di studiare come può essere gestito il sito *web* di un centro commerciale per sfruttare al meglio le sue potenzialità comunicative e relazionali, oltre che informative.

La scelta di focalizzarsi sul concetto di WA, in particolare, si lega alla considerazione che tale concetto è espressivo della componente esperienziale ed emotiva dell'offerta degli *shopping center*. La dimensione emozionale ed edonistica dello *shopping* rappresenta, infatti, il principale elemento di differenziazione del centro commerciale (De Nisco e Napolitano, 2006; Gallucci e Poponessi, 2008) e il concetto di WA esprime al meglio tale connotazione, collegandosi direttamente alla *shopping experience* (Eroglu *et al.*, 2003).

Il lavoro si sviluppa attraverso un'analisi della letteratura focalizzata sui temi della comunicazione *online* e della WA ed un'indagine empirica, di tipo quantitativo, condotta su un campione di potenziali utenti.

I risultati della ricerca rivelano che i giovani apprezzano la possibilità offerta dal sito *web* di metterli in contatto con il centro commerciale o altri utenti ad esso interessati e dichiarano di essere tendenzialmente molto attratti dagli elementi del sito *web* di natura *social*, che favoriscono l'interattività e la condivisione dei contenuti. Da ciò derivano implicazioni interessanti in merito alla gestione degli investimenti *online* mirati ad incrementare le visite e rafforzare i processi di fidelizzazione.

2. Background teorico e framework analitico di riferimento

A partire dagli anni '90 sono stati prodotti numerosi studi finalizzati a comprendere le dimensioni-chiave su cui puntare per progettare siti *web* efficaci, in grado di attrarre e fidelizzare i consumatori (Nour e Fadlalla, 2000; Chen e Yen, 2004; Tan e Wei, 2006; Hernandez *et al.*, 2009; Belanche *et al.*, 2012). Un indirizzo particolare si è sviluppato, dagli anni 2000, attorno al tema della WA. Questo concetto, comprende molte variabili dell'ambiente virtuale considerate negli studi sulla *website quality*. La sua peculiarità sta nel richiamo forte e diretto al concetto di *shopping experience* (Eroglu *et al.*, 2003). Essa deriva, infatti, dalla nozione tradizionale di atmosfera elaborata con riferimento al contesto fisico, la quale prende spunto dal filone del consumo edonistico (Hirschman e Holbrook, 1982) e rappresenta l'insieme di stimoli, tangibili e non, che possono essere gestiti per creare ambienti fisici piacevoli ed attraenti, in grado di sedurre il consumatore e favorire la soddisfazione dei suoi bisogni immateriali ed edonistici (Turley e Milliman, 2000).

Nonostante il crescente interesse verso lo studio della WA, la ricerca empirica su questo tema appare ancora piuttosto limitata (Gatautis e Vaiciukynaite, 2013). Alcuni autori hanno approfondito singoli *atmospherics*, quali la navigabilità (Taylor e England, 2006), la musica (Kim e Lennon, 2012) e i colori (Koo e Ju, 2010). Uno studio recente di Manganari *et al.*, (2009) ha portato, invece, alla definizione di una tassonomia concettuale secondo cui la WA è composta da quattro componenti fondamentali: (1) *virtual layout and design* (VLAY); (2) *virtual atmospherics* (VATM); (3) *virtual theatrics* (VTHE) e (4) *virtual social presence* (VSOC). Tale tassonomia è stata successivamente completata da Gatautis e Vaiciukynaite (2013) con l'aggiunta di ulteriori variabili (Tab. 1).

Il modello che ne deriva è esaustivo in quanto comprende nella definizione di WA sia la dimensione funzionale che informativa e comunicazionale del sito *web*. Esso, tuttavia, è molto generico e non considera le peculiarità dei contesti aziendali.

Con riferimento al settore *retail*, e soprattutto ai centri commerciali, non sono stati trovati modelli di analisi ad hoc. Nello stesso tempo, come si è detto, questo contesto presenta caratteristiche tali da rendere potenzialmente interessante lo studio di un modello specifico di *atmospherics* su cui basare la progettazione del sito *web*, attraverso un'esplicitazione delle variabili quanto più precisa possibile.

Integrando il modello di Gatautis e Vaiciukynaite (2013) con precedenti ricerche sul *websitedesign* e la WA, si propone in questo lavoro un *framework* di attributi in grado di rispecchiare le specificità del contesto. L'elenco di variabili, raggruppate nelle quattro dimensioni definite da Gatautis and Vaiciukynaite è sintetizzato in tabella 1.

Tab. 1: Le variabili della web atmosphere applicate ai centri commerciali

Marco Cioppi
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Federica Tombari
La percezione della web atmosphere tra i visitatori del centro commerciale

Modello concettuale di Gatautis e Vaiciukynaitė (2013)	Attributi	Riferimenti
	N°	Descrizione
VLAY1		
Grid layout Free-form layout Racetrack layout Navigational design - tree hierarchical structure, site map index, search engine; - website content ranking and grouping; - menu, links	1	Facilità di navigazione del sito (presenza di un percorso guidato per la navigazione delle diverse pagine)
	2	Funzionalità di ricerca avanzate (mappa del sito, motore di ricerca interno, menu permanente del sito)
	3	Presenza di link che rimandano ad altri siti web collegati (es.: link che rimandano a siti web delle insegne presenti nel centro commerciale)
	4	Accessibilità del sito web (= buona indicizzazione nei principali motori di ricerca)
	5	Velocità di navigazione
	6	Funzionalità multilingue
VATM2		
Background colour Colour scheme % of white space Background music Scent appeal Touch appeal Information content and structure Aesthetic design Website brand personality	7	Ampiezza delle informazioni disponibili sul centro commerciale (storia, valori, localizzazione, mappa del centro, negozi presenti, servizi commerciali e ricreativi offerti)
	8	Disponibilità di informazioni su prezzi/promozioni (volantini, sconti,...)
	9	Informazioni su eventi/attività organizzate all'interno del centro commerciale
	10	Informazioni sulle carte promozionali attivate dal centro o dai negozi
	11	Indicazione dell'indirizzo del centro commerciale
	12	Disponibilità di informazioni aggiornate
	13	Presenza di una sezione dedicata alle news informative
	14	Presenza di banner pubblicitari riguardanti il centro commerciale/attività presenti all'interno della struttura
	15	Visibilità del brand aziendale (nome/logo del centro commerciale)
	16	Visibilità dei singoli brand presenti (nome/logo dei negozi presenti nel centro commerciale)
	17	Background colour (utilizzo di colori di sfondo in linea con l'immagine/il brand aziendale)
18	Sfondo audio	

VTHE ³			
Animation techniques Image interactivity Vividness interactivity	19	Flash animation	Baloglu e Peckan, 2006
	20	Photogallery riguardante il centro commerciale	
	21	Photogallery riguardante i singoli negozi	Shim e Lee, 2011
	22	Videogallery riguardante il centro commerciale	
	23	Videogallery riguardante i singoli negozi	
24	Tour virtuale del centro commerciale		
VSOC ⁴			
Web counter Comment from other visitors Crowding Avatars Virtual communities Recommendations Communication	25	Presenza di un web-counter	Baloglu e Peckan, 2006; Chen <i>et al.</i> , 2010
	26	Presenza sezione "lascia un commento"	
	27	Visualizzazione del numero di persone contemporaneamente sul sito	Chenet <i>et al.</i> , 2010; Kim e Stoel, 2004; Ranganathan e Ganapathy, 2002
	28	Presenza di forum di discussione	
	29	Links ai principali social network	
	30	Presenza di live chat	Kim e Stoel, 2004 Jiang <i>et al.</i> , 2010
	31	Indicazione di contatti telefonici del centro commerciale	Bai <i>et al.</i> , 2008
	32	Indicazione di contatti telefonici dei singoli negozi	Bai <i>et al.</i> , 2008
	33	Indicazione di contatti e-mail del centro commerciale	Bai <i>et al.</i> , 2008
	34	Indicazione di contatti e-mail dei singoli negozi	
	35	Modulo di richiesta informazioni online	

¹ Riguarda principalmente la navigabilità/accessibilità/usabilità del sito.

² Riguarda principalmente il contenuto informativo del sito (varietà e dettaglio) e il modo in cui le informazioni sono strutturate e presentate (grafica, colori, ecc.).

³ Riguarda principalmente la dimensione estetica del sito (come sono presentati testi e immagini).

⁴ Riguarda principalmente la capacità del sito di far interagire l'impresa con gli utenti e di stimolare le relazioni tra questi.

Fonte: ns. elaborazione

Molte di queste variabili sono state approfondite in precedenti ricerche. L'impatto positivo sul comportamento dell'utente è stato spesso dimostrato, soprattutto con riferimento alla dimensione fisica dell'atmosfera *online* (Manganari *et al.*, 2009).

Meno esplorati appaiono, invece, gli effetti sul consumatore prodotti dalla dimensione sociale della WA, attinenti agli aspetti comunicazionali ed interattivi del sito (Loiacono *et al.*, 2007; Hausman e Siekpe, 2009), sebbene

la letteratura tradizionale (Babin e Attaway, 2000; Baker *et al.*, 1993; Sands *et al.*, 2008) e gli studi sul *web management* (Riegner, 2007; Fosdick, 2012) evidenzino la sua importanza crescente. In particolare, negli anni recenti, l'emergere del *Web 2.0* ha influenzato le modalità con cui attori - come le imprese, gli utenti, i consumatori - interagiscono e cooperano durante lo scambio di informazioni e di conoscenza (Enders *et al.*, 2008).

Constantinides e Fountain (2008) affermano che le più importanti applicazioni *Web 2.0* (*Social Network*, *Community*, *Blog*) permettono di espandere l'esperienza, la conoscenza e il potere di mercato degli utenti. I *Social Network* vengono, inoltre, visti come strumenti in grado di migliorare la comunicazione (Berthon *et al.*, 2012; Wang *et al.*, 2012) e le relazioni con i clienti, la reputazione aziendale (Hawn, 2009) e la capacità di produrre innovazioni di prodotto/servizio (Kaplan e Haenlein, 2010) e di *business networking*. In particolare, i moderni *Social* consentono lo sviluppo di relazioni interattive tra aziende e utenti, offrendo opzioni aggiuntive alle imprese per l'aggiornamento di attività di marketing, come la promozione/comunicazione, le vendite e le ricerche di mercato (Kaplan e Haenlein, 2010; Chen *et al.*, 2011; Kirtis e Karahan, 2011; Berthon *et al.*, 2012).

In considerazione di ciò, il presente studio si sofferma in particolare sull'analisi della dimensione *sociale*/interattiva della WA, cercando di proporre un contributo aggiuntivo al dibattito sul tema, pur restando focalizzato sulla gestione complessiva del sito *web* che continua ad essere il più importante generatore di contenuti veicolati attraverso le diverse applicazioni *Web* (tra cui i *Social Media*) (Istat, 2014).

3. Metodo di ricerca e caratteristiche degli intervistati

L'indagine empirica è stata finalizzata al duplice scopo della ricerca:

- testare la coerenza del *framework* di *atmospherics* proposto per i centri commerciali;
- analizzare gli elementi della WA che impattano maggiormente sugli utenti, in funzione del diverso atteggiamento che essi hanno nei confronti del centro commerciale.

Il metodo di ricerca si è basato sulla somministrazione di un questionario ad un campione di studenti iscritti all'Università di Urbino.

La scelta di focalizzarsi sui giovani studenti trova diverse giustificazioni.

Mentre in passato gli studi sul comportamento degli individui negli *shopping center* hanno considerato principalmente gli adulti, un numero crescente di ricerche rileva che il segmento degli studenti rappresenta un mercato molto interessante per tale *format*. Studi nazionali (Cnr, 2009; De Fiori *et al.*, 2010; Istat, 2014) ed internazionali supportano la rilevanza di questo target per i centri commerciali (Baker e Haytko, 2000; Matthews *et al.*, 2000; Sari *et al.*, 2015) e sempre più autori vi hanno focalizzato l'analisi (Haytko e Baker, 2004; Martin e Turley, 2004; El-Adly, 2007; Khaola *et al.*, 2014; Sari *et al.*, 2015).

L'attenzione verso i giovani, in generale, deriva anche dalla considerazione che questo target è potenzialmente interessato al centro commerciale in quanto più attratto dalla dimensione edonistica e ricreativa dello *shopping*

di quanto lo siano gli adulti e gli anziani (Arnold e Reynolds, 2003; Martin e Turley, 2004; Massicote *et al.*, 2011; Khaola *et al.*, 2014). Il centro commerciale può rappresentare, infatti, un'interessante fonte di richiamo per tale segmento essendo un luogo di passatempo e socializzazione.

Oltre a queste considerazioni, la scelta di esaminare i giovani studenti, in questo lavoro, si lega al tecnicismo di alcune variabili utilizzate per descrivere la WA. In linea con altri studi sulla qualità e il *design* del sito *web* (Chen e Wells, 1999; Lin e Lu, 2000; Loiacono *et al.*, 2007), si è ritenuto opportuno selezionare un campione che fa un uso rilevante e consapevole del *Web* (Rapporto Censis/UCSI, 2013) in modo da essere in grado di comprendere la terminologia e le problematiche essenziali connesse con le componenti e le caratteristiche del sito.

Il questionario è stato strutturato in tre sezioni:

- dati anagrafici;
- intensità di frequenza del centro commerciale e principali elementi di attrazione;
- rilevazione dell'importanza attribuita alle variabili della WA.

Le domande relative agli elementi di attrazione del centro commerciale ed agli attributi della WA di un ipotetico centro commerciale sono state sottoposte alla valutazione degli studenti mediante scala Likert a 5 passi.

In fase di elaborazione, per verificare la coerenza della WA in riferimento alle dimensioni individuate ed ai rispettivi attributi, si è proceduto, dapprima, all'analisi di asimmetria e curtosi; il test è utile per verificare se le risposte date hanno una distribuzione prossima o meno alla gaussiana. Da tale analisi risulta che gli indici di asimmetria e curtosi hanno valori sostanzialmente compresi tra -1 e +1 per tutti gli attributi, perciò nessuno di questi può essere escluso.

Successivamente è stata effettuata un'analisi delle correlazioni e si è calcolato il coefficiente Alpha di Cronbach. L'obiettivo dell'analisi non è stato quello di verificare l'unidimensionalità del modello, quanto piuttosto la sua coerenza. A tal fine, ciascuna dimensione è stata ulteriormente testata attraverso un'analisi fattoriale basata sul metodo di estrazione delle componenti principali (Joliffe, 2002).

Successivamente, gli intervistati sono stati raggruppati in quattro segmenti, utilizzando come variabili discriminanti l'intensità di frequenza dei centri commerciali e gli elementi del *format* che esercitano la maggiore attrazione su di essi.

Nell'analizzare l'atteggiamento dei singoli segmenti rispetto alle variabili della WA, è stato effettuato il test sulle differenze tra le medie (T di Student) rispetto ad alcuni filtri importanti: maschi/femmine, scarsa/elevata frequenza, atteggiamento funzionale/ricreativo.

Il campione è composto da 438 studenti. Il 67% degli intervistati ha un'età compresa tra 18 e 20 anni. La maggior parte degli intervistati è di sesso femminile (66%) ed ha un profilo *social* (96%). Il 59% degli intervistati utilizza Internet mediamente da 1 a 3 ore al giorno; il 19% da 3 a 5 ore.

Una percentuale molto esigua di intervistati (3,65%) non frequenta i centri commerciali. Il 23,74% vi si reca solo occasionalmente (meno di una volta al mese). La maggior parte (50%) dichiara di visitarli, in media,

almeno 1 volta al mese, mentre i restanti si recano in tali strutture almeno 1 volta a settimana (22,61%).

Gli elementi di maggiore attrazione del *format* sono nell'ordine: ampiezza dei prodotti/servizi offerti (136), presenza di offerte promozionali (132), presenza di attività di intrattenimento come cinema, ristoranti, spettacoli (64), possibilità di incontro con altre persone (17)². Sebbene l'offerta di intrattenimento sia stata valutata complessivamente importante, l'analisi dei dati rivela un atteggiamento di maggiore interesse nei confronti di quegli attributi riguardanti la varietà assortimentale e la convenienza economica.

Da rilevare la differenza delle valutazioni medie tra maschi e femmine soprattutto rispetto alla variabile "offerte promozionali": la media dei maschi è 3,60 mentre quella delle femmine è 3,87, delineando una maggiore attenzione di queste ultime nei confronti delle promozioni proposte dal centro commerciale.

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4. Analisi e discussione dei risultati

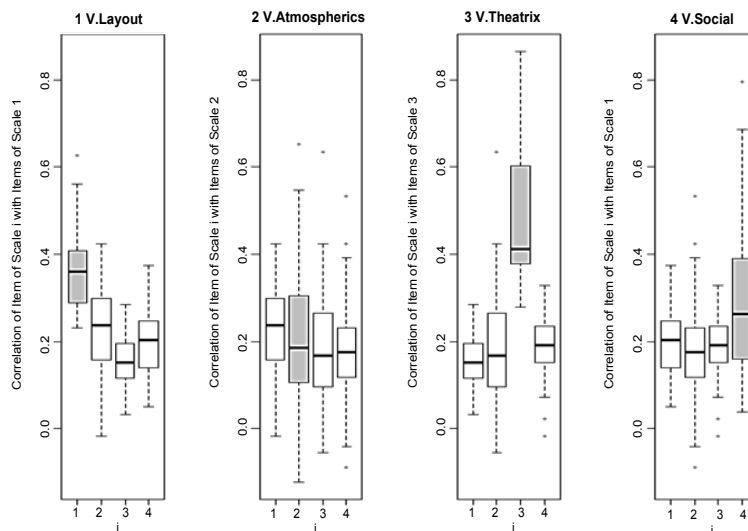
4.1 Analisi degli attributi della WA

La lista di attributi descritti in Tab.1 è stata generata a partire da un riesame della letteratura esistente e da un'indagine svolta su un *focus group* tesa ad esplorare gli attributi su cui si dovrebbe basare la progettazione del sito *web* di un centro commerciale, affinché esso possa comunicare al meglio la dimensione esperienziale del *format* ed attrarre, in questo modo, visitatori al punto vendita fisico. Al *focus* hanno partecipato studenti universitari, aventi caratteristiche il più possibile simili a coloro che avrebbero successivamente risposto al questionario. La lista di attributi così ottenuta è stata valutata con metodo Delphi, mediante tre *round* di valutazioni effettuate con tre studenti dottorandi: gli attributi sono stati valutati sulla base di alcuni aspetti, quali la leggibilità, la chiarezza e la ridondanza, ed in base alla percezione di coerenza rispetto al costruito oggetto di indagine. Al termine del processo sono rimaste le 35 variabili descritte in Tab.1.

Per valutare la coerenza interna del *framework*, è stata svolta, anzitutto, un'analisi di correlazione *item-total*. Nel caso di VLAY, VTHE e VSOC, i valori delle correlazioni interne sono decisamente maggiori rispetto a quelli riportati alle altre variabili del *framework*; ciò supporta la validità della costruzione. Solo nel caso di VATM queste correlazioni sono meno evidenti: tale dimensione sembra essere meno supportata dai dati esaminati, anche se ciò non è sufficiente per giudicare la sua rappresentatività (Fig. 1).

² L'atteggiamento del consumatore nei confronti del centro commerciale dipende dal modo in cui esso si rapporta alla più generale attività di shopping. Esso può essere guidato da motivazioni di natura funzionale (Babin *et al.*, 1994; Kim, 2006) oppure edonistica/ricreativa (Westbrook e Black, 1985; Babin *et al.*, 1994). Contestualizzando l'analisi al centro commerciale, l'atteggiamento funzionale può tradursi nella ricerca di ampi assortimenti di prodotti/servizi e prezzi convenienti/offerte promozionali. L'atteggiamento edonistico/ricreativo, invece, può tradursi nella ricerca di intrattenimento e di momenti di socialità, indipendentemente dall'acquisto di prodotti e servizi (Arnold e Reynolds, 2003).

Fig.1: Item-total correlation



Fonte: ns elaborazione

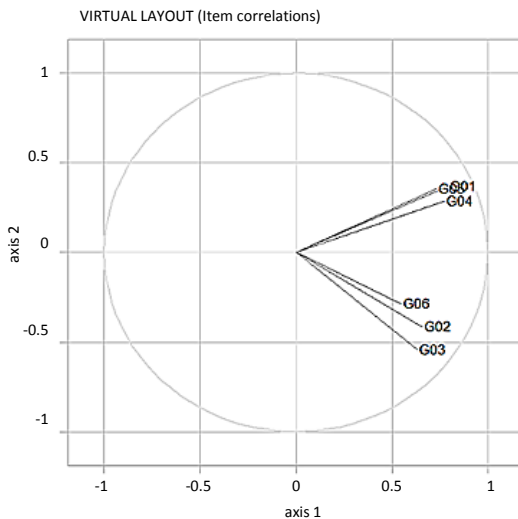
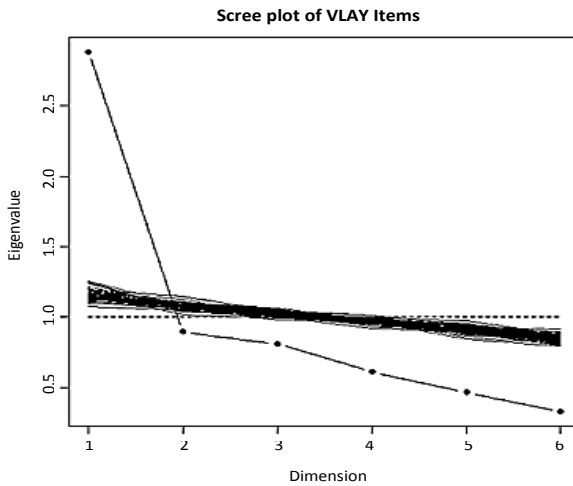
Il calcolo del coefficiente Alpha di Cronbach supporta l'analisi item-total, rilevando valori superiori a quello di soglia (>0.7) per tutte le dimensioni. Nel dettaglio: VLAY=0.7760, VATM=0.7650, VTHE=0.8489, VSOC=0.8212.

Ulteriore conferma della coerenza del *framework* è stata ricercata attraverso lo studio delle correlazioni interne ed una *factor analysis* esplorativa condotta su ciascuna dimensione (Joliffe, 2002). Di seguito, si riportano i risultati sintetici dell'analisi:

- VLAY: L'analisi delle componenti principali conferma la robustezza della dimensione. Il grafico circolare delle correlazioni rileva che tutti gli attributi sono orientati nella stessa direzione (ovvero hanno correlazioni positive), sebbene alcuni di essi mostrino valori di correlazione più forti (Fig. 2), che potrebbero identificare l'esistenza di due sotto-dimensioni: VLAY1=(G01, G04, G05) comprendente variabili maggiormente attinenti la funzionalità nell'utilizzo del sito *web*, VLAY2=(G02, G03, G06) comprendente variabili che riguardano la funzionalità nella ricerca dei contenuti *web*. Questa prima dimensione è comunque robusta e coerente.

Fig. 2: Scree plot e item correlation (VLAY)

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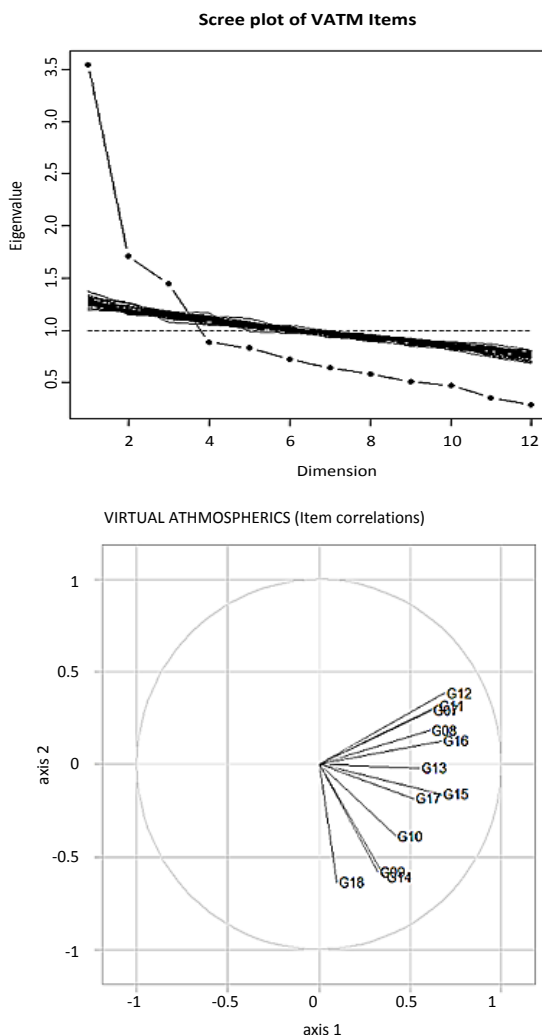


Fonte: ns elaborazione

- VATM: L'analisi delle componenti principali non conferma pienamente la robustezza della dimensione, anche se ciò non compromette la sua coerenza.

Il grafico circolare delle correlazioni conferma la positività di queste ultime (Fig. 3), sebbene si possa notare una differente intensità di correlazione tra attributi che potrebbe identificare alcune sotto-dimensioni (VATM1=(G07, G08, G11, G12, G16), VATM2=(G09, G10, G14, G18), VATM3=(G13, G15, G17)), le quali tuttavia, non appaiono nitide nemmeno sotto il profilo concettuale. In definitiva, questa dimensione pur essendo ben rappresentata, si può considerare più debole delle altre.

Fig. 3: Scree plot e item correlation (VATM)

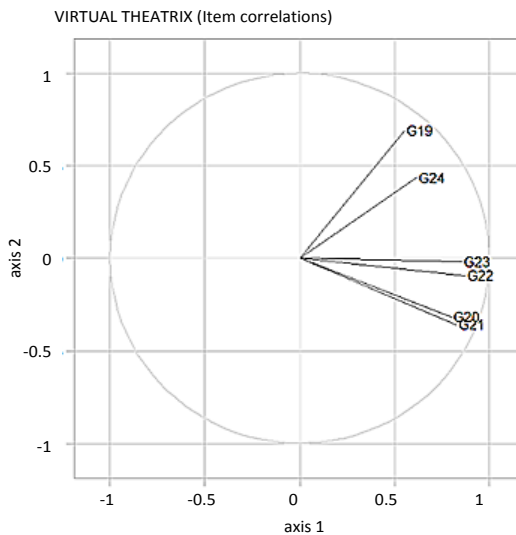
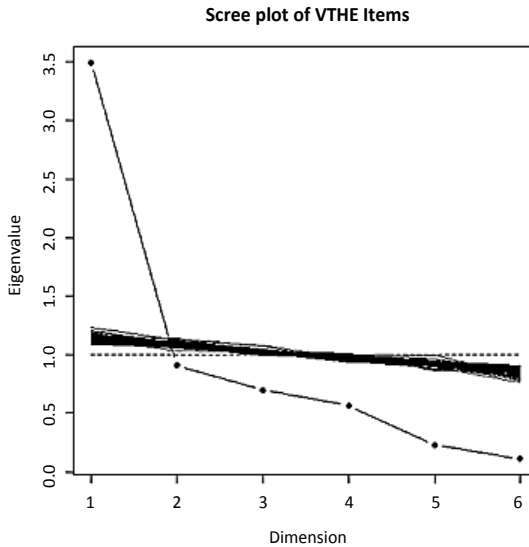


Fonte: ns elaborazione

- VTHE: L'analisi delle componenti principali conferma la robustezza della dimensione. Il grafico circolare delle correlazioni mette in rilievo che tutti gli attributi sono orientati nella stessa direzione (identificando correlazioni positive), sebbene alcuni abbiano un grado di correlazione più forte rispetto ad altri (Fig.4). Come per la prima dimensione, si potrebbero identificare due sotto-dimensioni: VTHE1=(G19, G24), attinente gli aspetti visivi del sito *web* che richiedono interattività dell'utente, e VTHE2=(G20, G21, G22, G23), attinente gli attributi visivi che presuppongono un atteggiamento dell'utente più passivo. Nell'insieme, anche questa dimensione è robusta e coerente.

Fig. 4: Scree plot e item correlation (VTHE)

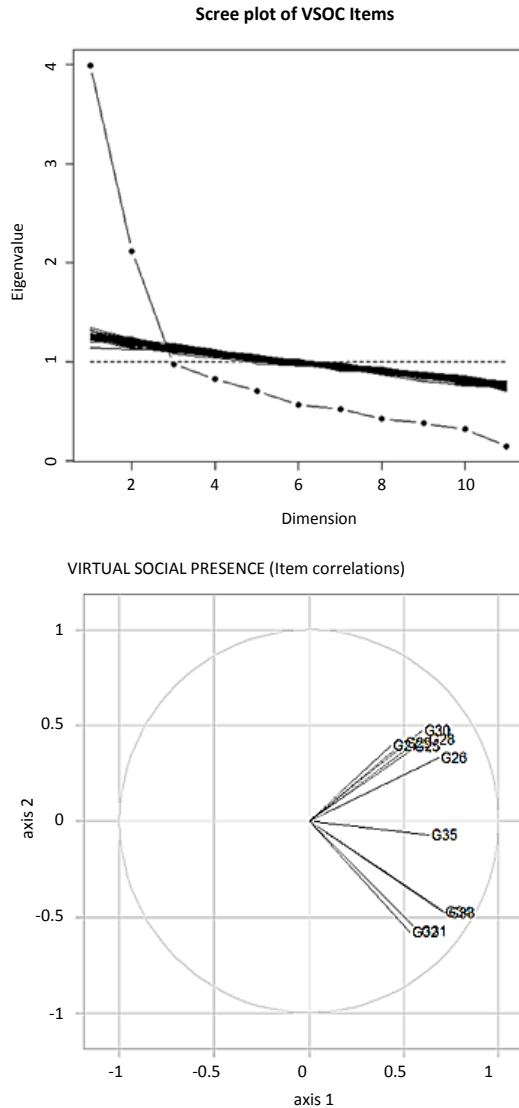
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Fonte: ns elaborazione

- VSOC: L'analisi delle componenti principali conferma la robustezza della dimensione. Il grafico circolare delle correlazioni mette in rilievo che tutti gli attributi sono ugualmente orientati (quindi hanno correlazioni positive) e sono ben raggruppati tra loro ad esclusione di uno (G35) (Fig.5). Anche in quest'ultimo caso si potrebbero identificare due sotto-dimensioni: VSOC1= (G25, G26, G27, G28, G29, G30) e VSOC2=(G31, G32, G33, G34, G35), attinenti rispettivamente gli attributi di comunicazione tipici del *Web 2.0* (di natura più *social*) e quelli tipici del *Web 1.0* (telefono, e-mail, ecc.).

Fig. 5: Scree plot e item correlation (VSOC)



Fonte: ns elaborazione

Le analisi confermano, in definitiva, la coerenza interna del *framework* di *atmosphériques*. Le correlazioni sono positive e l'Alpha di Cronbach è sempre superiore al valore di soglia (>0.7). L'analisi delle componenti principali non permette di dimostrare l'esistenza di una scala perfettamente unidimensionale ma questo non significa che il *framework* non sia rappresentativo e coerente. I grafici circolari delle correlazioni dimostrano, infatti, che quasi tutte le dimensioni sono ben rappresentate, sebbene si potrebbero individuare alcune sotto-dimensioni per rendere più robusto il modello.

4.2 Una proposta di segmentazione degli utenti

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Dopo aver analizzato la coerenza del *framework*, si è approfondito il comportamento degli intervistati disaggregandoli in funzione del numero medio di visite al centro commerciale e degli elementi del *format* che esercitano la maggiore attrazione su di essi.

Si è stabilito che coloro che si recano in tali strutture almeno una volta al mese o almeno una volta a settimana appartengono alla categoria “High Frequency”, mentre coloro che vi si recano meno di una volta al mese o mai appartengono al gruppo “Low Frequency”. Raggruppando così gli intervistati, il 72,61% del totale visita con discreta regolarità il centro commerciale: da un minimo di una volta al mese a un massimo di una o più volte a settimana. Il restante 27,39% dichiara di recarsi meno di 1 volta al mese oppure mai. Questi dati sono in linea con precedenti studi che evidenziano l'importanza del *target* giovanile per il *format* in considerazione (cfr. par. 3).

Anche gli elementi di attrazione del *format* sono stati raggruppati in due categorie³:

- elementi funzionali: comprendono l'ampiezza dei prodotti/servizi offerti (F1) e la presenza di offerte promozionali (F2);
- elementi ricreativi: comprendono l'offerta di attività di intrattenimento (F3) e la possibilità di incontrare altre persone (F4).

In generale, i frequentatori più assidui tendono ad attribuire un punteggio mediamente più alto a tutti gli elementi di attrazione considerati; i visitatori meno frequenti, invece, essendo già di partenza meno attratti dal *format*, attribuiscono valori più cauti ai singoli elementi indagati (Tab.2). In entrambi i casi, le dimensioni del centro commerciale più interessanti risultano essere quelle di natura funzionale. Rilevante è anche la valutazione positiva del fattore intrattenimento da parte dei frequentatori più assidui. Rispetto agli altri, questi ultimi tendono ad attribuire un valore mediamente superiore alle caratteristiche afferenti la dimensione ricreativo/esperienziale del centro.

Tab. 2: Elementi di attrazione del centro commerciale: confronto tra visitatori con scarsa o medio/alta frequenza

	Low Frequency				High Frequency			
	Valore <3	Valore =3	Valore >3	Valore medio	Valore <3	Valore =3	Valore >3	Valore medio
ampiezza prodotti/servizi	20	24	76	3,73	41	69	208	3,82
offerte promozionali	29	19	72	3,62	32	74	212	3,84
attività di intrattenimento	54	27	39	2,78	102	81	135	3,18
possibilità di incontro con altre persone	79	24	17	2,15	181	82	55	2,37

Fonte: ns elaborazione

³ Cfr. precedente nota 2.

Considerando il test sulle differenze tra le medie, il valore è statisticamente irrilevante per la prima variabile (ampiezza prodotti e servizi offerti), mentre risulta importante per gli altri fattori di attrazione considerati: i visitatori High Frequency danno maggiore rilievo, rispetto a quelli meno frequenti, a queste ultime tre variabili.

Approfondendo il confronto tra l'intensità di frequenza del centro commerciale e gli elementi di attrazione del *format* si è tentato di delineare una possibile segmentazione dei visitatori.

Poiché i diversi fattori di attrazione sono stati valutati con scala Likert a 5 passi, si è assunto che la singola categoria di elementi (funzionali e ricreativi) è significativa quando il valore attribuito contemporaneamente ai due fattori è maggiore di 3.

Prendendo le categorie-limite, composte dai soli soggetti che attribuiscono esclusiva importanza alla dimensione funzionale oppure a quella ricreativa, e considerando la ripartizione del campione tra Low e High Frequency, sono stati individuati i seguenti segmenti: cacciatori di offerte (25%), distensivi (3%), funzionali (65%), ricreativi (7%).

I "cacciatori di offerte" visitano con scarsa frequenza il centro commerciale ed attribuiscono esclusiva importanza alla dimensione funzionale/economica del *format*: prediligono la varietà assortimentale e vi si recano prevalentemente in occasione di offerte promozionali giudicate allettanti.

I "distensivi" visitano saltuariamente il centro commerciale ma sono più attratti dagli elementi ricreativi. Può essere il caso dell'utente che si reca al centro commerciale solo perché attratto, per esempio, da un determinato evento.

"Funzionali" e "ricreativi" visitano con regolarità abbastanza intensa il centro commerciale: i primi sono attratti dall'efficienza funzionale e sono costantemente attenti a sfruttare le offerte promozionali proposte; i "ricreativi" sono coloro che apprezzano esclusivamente la capacità attrattiva del centro commerciale legata all'offerta di attività ludiche e di intrattenimento e sono attirati a frequentare i servizi ricreativi presenti al suo interno.

4.3 Tipologie di utenti e atteggiamento nei confronti della WA

I "cacciatori di offerte" e i "funzionali" attribuiscono maggiore importanza, rispetto alla media, alle variabili attinenti la navigabilità del sito *web* (VLAY). Si presume che questi soggetti, essendo molto attenti alle offerte promozionali del centro, visitino il sito *web* esclusivamente per documentarsi sulla presenza di eventuali iniziative. Ne consegue una naturale attenzione alle dimensioni riguardanti la funzionalità e l'usabilità del sito. A riprova di ciò, si evidenzia un atteggiamento dei "ricreativi" connotato da una scarsa attenzione alle suddette variabili.

In relazione a VATM, "cacciatori di offerte", "funzionali" e "ricreativi" attribuiscono valori mediamente superiori rispetto al campione. I "funzionali", in particolare, sono molto attenti alle informazioni riguardanti le carte promozionali attivate dal centro. "Distensivi" e "ricreativi" sono più

attenti alla presenza di *banner* pubblicitari, all'audio del sito ed alla presenza di informazioni aggiornate sugli eventi e le attività d'intrattenimento organizzate dal centro. Ciò riflette il diverso atteggiamento delle due tipologie di utenti: da un lato, i "cacciatori di offerte" e i "funzionali" che, in generale, sono più attenti alle informazioni di carattere economico/commerciale; dall'altro, gli individui attratti dalla dimensione ludico/ricreativa del centro commerciale che focalizzano maggiormente l'attenzione sulle informazioni in grado di veicolare questo tipo di offerta.

Rispetto alle variabili VTHE, i "cacciatori di offerte" e i "distensivi" mostrano un atteggiamento di minore interesse. La scarsa frequenza con cui visitano il centro commerciale potrebbe riflettersi anche in una scarsa frequenza di accesso ai relativi siti *web* che vengono visitati prestando esclusiva attenzione al contenuto informativo di carattere promo/commerciale, trascurando completamente il suo aspetto più teatrale.

Per quanto riguarda, infine, la dimensione VSOC, i "funzionali" e i "ricreativi" sono mediamente più attenti a queste variabili rispetto ai "cacciatori di offerte" e i "distensivi". Anche questo riflette il diverso atteggiamento degli utenti: "funzionali" e "ricreativi" visitano con più frequenza i centri commerciali e tendono ad attribuire maggiore importanza allo sviluppo di relazioni di lungo termine, finalizzate alla fruizione di informazioni e contenuti ricchi ed approfonditi.

La conduzione di ulteriori test sulle differenze tra le medie rileva considerazioni aggiuntive che confermano quanto detto.

I frequentatori dei centri commerciali (rispetto ai non frequentatori) tendono ad attribuire un punteggio mediamente più alto a tutti gli attributi della WA. Le differenze più rilevanti si riscontrano in riferimento ad alcune variabili di VLAY e VATM che sono più interessanti per chi visita regolarmente tali strutture (accessibilità: 3.66 vs. 3.52, velocità: 4.10 vs. 3.89, informazioni su carte promozionali: 3.21 vs. 2.88; disponibilità di informazioni aggiornate: 3.75 vs. 3.58, presenza di banner pubblicitari relativi al centro commerciale: 2.42 vs. 2.21) ed agli attributi visivi (VTHE) basati sulla presenza di immagini (photogallery del centro: 3.57 vs. 3.29; photogallery dei singoli negozi: 3.53 vs. 3.31).

Altre differenze si rilevano in relazione all'atteggiamento verso il centro commerciale. I funzionali, esprimono valutazioni mediamente più elevate in riferimento a tutte le variabili VLAY attinenti l'aspetto funzionale del sito ed a tutte le variabili attinenti il contenuto informativo (VATM), ad eccezione di quella riguardante le informazioni sugli eventi organizzati dal centro (evidentemente i "funzionali" sono meno interessati a ciò). Inoltre, si riscontrano differenze in relazione alle variabili VSOC, ad eccezione di quelle relative alla presenza di *live chat* e *forum*, probabilmente perché i funzionali sono anche meno attratti dalla dimensione sociale del *format*. I ricreativi, invece, valutano con maggiore importanza gli attributi inerenti la velocità di navigazione (3.90 vs. 3.72), la presenza di link ad altri siti (3.20 vs. 2.84) e il fatto che il sito sia multilingue (3.57 vs. 3.03). Inoltre, si rilevano differenze particolari in merito ai seguenti attributi: disponibilità di informazioni sul centro commerciale (3.48 vs. 3.20), informazioni su eventi (3.42 vs. 2.60) e sfondo audio (2.28 vs. 1.83), per quanto riguarda la dimensione VATM; forum di discussione (2.68 vs. 2.33), *link* ai *social*

network (3.06 vs. 2.57), presenza di live chat (2.36 vs. 2.01) e modulo di richiesta informazioni *online* (2.96 vs. 2.57), in relazione alla dimensione VSOC. Tutto ciò testimonia e rafforza che l'atteggiamento di *shopping* degli utenti si riflette anche sulle modalità di navigazione.

5. Conclusioni

L'analisi svolta fornisce una risposta affermativa al quesito iniziale della ricerca: l'atteggiamento degli utenti nei confronti del centro commerciale influenza le finalità per cui il sito *web* viene utilizzato; nello stesso tempo, a prescindere dall'orientamento dell'utente - funzionale o ricreativo - i giovani intervistati apprezzano in maniera particolare la presenza di attributi che favoriscono la comunicazione e l'interattività. Tale atteggiamento tende ad essere tanto più forte quanto più i consumatori frequentano con regolarità il centro commerciale. Questi, infatti, attribuiscono maggiore importanza al contenuto esperienziale del format; di conseguenza, ripongono maggiore attenzione alle variabili del sito *web* riguardanti la dimensione *sociale* ed interattiva.

Ciò mette in luce alcuni elementi che fanno riflettere sulle implicazioni teoriche e manageriali derivanti dalla ricerca.

Sotto il profilo teorico, lo studio fornisce indicazioni sia metodologiche che concettuali.

In termini metodologici, il principale apporto è legato allo svolgimento di un'analisi completa della WA, basato su un *framework* di attributi più articolato rispetto ai modelli proposti in passato. La maggior parte delle ricerche precedenti, infatti, si sono soffermate sull'analisi di singoli *atmosphériques*, quali la musica (Kim e Lennon, 2012), i colori (Koo e Ju, 2010) o il disegno di navigazione (Taylor e England, 2006). Lo studio, inoltre, propone un *framework* di attributi applicato ad uno specifico contesto aziendale, quello dei centri commerciali, seguendo l'indicazione di Tordjman (1994) secondo cui l'importanza degli *atmosphériques* dipende dalla peculiarità dei settori analizzati. Il lavoro contribuisce, dunque, alla letteratura esistente sul *retail management*, individuando un *framework* di variabili in grado di cogliere le specificità del contesto indagato.

In termini concettuali, lo studio rafforza i risultati di precedenti ricerche che sottolineano l'importanza degli attributi *sociali* e relazionali del sito *web*, capaci di esaltarne l'interattività (Baloglu e Peckan, 2006; Riegner, 2007; Fosdick, 2012). Il lavoro sottolinea, infatti, il ruolo critico della dimensione VSOC nella valutazione del sito *web* da parte degli utenti.

Anche sotto il profilo manageriale, l'analisi suggerisce implicazioni interessanti.

Anzitutto, il valore mediamente alto attribuito agli elementi della WA (soprattutto da parte dei frequentatori più assidui del centro commerciale) raccomanda la necessità di sviluppare competenze organizzative in grado di valorizzare la comunicazione esperienziale *online*. Ciò richiede sforzi adeguati in termini di contenuti: occorre inserire informazioni e strumenti in grado di favorire l'interazione e lo scambio di comunicazione (Huotari *et al.*, 2015), per esempio attraverso la creazione di comunità *virtuali*, blog

di discussione e collegamenti con profili *social* che aumentano la capacità del sito *web* di svolgere un ruolo di aggregatore di utenti. Ancora, investimenti mirati a rafforzare la presenza e le promozioni sui *social network* e sugli altri strumenti di comunicazione interattiva potrebbero essere utili per incrementare le visite del sito per motivi di svago ed intrattenimento e il livello di fidelizzazione degli utenti. Inoltre è richiesto un grande impegno sotto il profilo manageriale. La gestione di un forum, di una live chat o di una pagina *social* necessita, infatti, di risorse preparate (Andzulis *et al.*, 2012), capaci di interagire in qualunque momento con l'utente e di fornirgli informazioni rapide e sempre aggiornate. Eventuali disservizi su questo fronte potrebbero originare fenomeni di passaparola negativi dannosi per l'immagine e il *brand* aziendale.

Il risultato della ricerca che rivela l'esistenza di differenti tipologie di utenti, dai cacciatori di offerte ai ricreativi, con specifiche peculiarità ed esigenze comunicative, suggerisce una seconda implicazione. La comunicazione *online* del centro commerciale non può essere standardizzata, ma disegnata nella struttura delle informazioni e nei contenuti in funzione delle specifiche esigenze del target al quale l'impresa ha deciso di indirizzarsi. Oggigiorno esistono numerosi strumenti che permettono al sito *web* di essere responsive ai devices dell'utente ed offrono la possibilità di usufruire di informazioni e servizi on demand. Basta dotare il sito di *cookie*, *pixel tag*, strumenti di analisi del *browser*, *log* del *server* ed altre tecnologie simili per poter raccogliere una grande quantità di informazioni sui visitatori e il loro comportamento in rete. Il problema, tuttavia, non è solo tecnico: gli strumenti automatici di profilazione dell'utenza sono ormai alla portata di tutti e questi permettono di personalizzare i contenuti adattandoli ai singoli casi. È sotto il profilo strategico che il management dovrebbe compiere una precisa scelta di target in funzione della quale deve essere progettata sia la struttura commerciale che quella del sito *web*. La comunicazione *online*, in altre parole, dovrebbe essere realizzata in funzione delle specifiche esigenze non solo dell'utente in rete, ma, soprattutto, dell'utente-*target* al quale il management ha deciso di indirizzarsi.

Una terza implicazione scaturisce dalla considerazione che il 65% del campione analizzato appartiene alla categoria dei funzionali. I giovani intervistati sono attratti soprattutto dall'efficienza funzionale del *format*. Se questo tende ad essere l'atteggiamento prevalente tra i giovani, assume rilevanza la capacità di sviluppare sistematiche e coordinate iniziative promozionali da veicolare attraverso il sito, che dovrebbe essere continuamente aggiornato per dare la possibilità agli utenti di informarsi in tempo reale sulle iniziative attivate dal punto vendita. In altre parole, il sito *web* dovrebbe essere utilizzato diffusamente come strumento di promozione, anche riservando delle specifiche offerte agli utenti in rete, oppure ricorrendo a concorsi ed altre iniziative specifiche per coloro che navigano con regolarità il sito. Quest'ultimo potrebbe anche essere studiato per contenere applicazioni scaricabili su *smartphone*, che permettono all'utente di essere sempre aggiornato, anche in maniera personalizzata, sulle novità promozionali attivate dal centro commerciale. L'orientamento funzionale dell'utente si traduce anche in un atteggiamento di particolare interesse verso l'accessibilità sia esterna che interna al sito *web*. Sul piano

della progettualità, ciò richiede una buona indicizzazione nei motori di ricerca e l'utilizzo di funzionalità di ricerca avanzate. In altre parole, il *design* dovrebbe essere concepito in maniera altrettanto efficace quanto i contenuti, per soddisfare al meglio le esigenze di funzionalità dell'utente.

Anche ciò evidenzia l'importanza di strutturare risorse specializzate nella comunicazione, nell'aggiornamento dei dati e nell'interazione con l'utenza. La gestione del sito, anche qualora venga concepito come semplice vetrina informativa (cosa frequente tra i centri commerciali), non può essere destrutturata e casuale: occorrono risorse, competenze e soprattutto una pianificazione adeguata delle attività, coerente con il resto della comunicazione aziendale e, ancor più in generale, con la strategia di mercato che l'impresa intende perseguire.

I risultati presentati in questo lavoro rappresentano il punto di partenza di un progetto più ampio che prevede ulteriori elaborazioni ed un'estensione dell'analisi.

Anzitutto, considerando il *framework* di attributi proposto, le analisi statistiche preliminari dimostrano una buona coerenza interna e suggeriscono di approfondire la validazione del *framework* al fine di individuare una vera e propria scala di attributi riferita al contesto dei centri commerciali.

In secondo luogo, il campione scelto in questo lavoro è composto da studenti universitari che hanno uno stile di vita particolare e comune. Sebbene il *target* giovanile sia potenzialmente interessante per il centro commerciale, come dimostrato in studi passati ed ulteriormente rilevato nella presente analisi, è interesse degli autori estendere, in futuro, la ricerca ad un campione più ampio di potenziali utenti per verificare l'effettiva consistenza dei segmenti proposti ed i relativi atteggiamenti nei confronti del sito *web*.

Infine, poiché in questo studio non sono state considerate le caratteristiche strutturali (dimensioni, tipologie di negozi e offerte proposte ai visitatori, età ed originalità della struttura...) e logistiche (vicinanza di grandi centri urbani, raggiungibilità,...) dei centri commerciali, sarebbe interessante approfondire in che modo questi attributi possono influenzare l'atteggiamento dell'utente nella valutazione della WA e le effettive modalità di gestione del sito *web* da parte delle imprese commerciali.

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Motivations, perceived risk and behavioural intentions in hard adventure tourism. A natural park case study¹

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Abstract

Purpose of the paper: This study on consumer behaviour intends to combine two lines of investigation. First, we examine how different motivation factors in adventure tourism affect behavioural intentions. Secondly, in order to provide a better understanding of behavioural intentions we further explore the differences between the groups of individuals' subjective perception of risk.

Design/methodology/approach: A visitor survey was conducted on a sample of hard adventure tourists at the Friuli Dolomiti Alps Natural Park. Factor analysis of motivational items resulted in four dimensions (i.e. nature, risk, contemplation and socialization). In order to discover a relationship between the four motivational factors and the adventure tourists' behavioural intention, a stepwise regression analysis was conducted. Then, using ANOVA and post hoc analysis (Scheffe's test), the existing differences between various levels of risk perception of adventure tourists and their response to behavioural intentions were analysed.

Findings: The analysis of motivational factors indicates that "activity related motivations" include four dimensions: nature, risk, contemplation and socialization. The stepwise regression results show that nature is the only motivational factor that affects tourists' behavioural intention.

Originality/value: This paper shows that "nature" is the key motivational factor for adventure tourists to revisit a park.

Practical implications: The analysis provides a framework suggesting how organizations might usefully implement a marketing strategy. This study encompasses the risk perception as a motivational factor and tries to discuss how this concept can be operationalized in tourism marketing.

Limitations: This paper presents two main limitations. Firstly, the cross sectional nature of the data, and secondly, the hypotheses were tested using a sample from a limited area.

Key words: adventure tourism; perceived risk; behavioural models; natural parks

1. Introduction

Forms of nature based tourism, such as adventure tourism, are considerably increasing in many countries. In America and Europe,

¹ The paper is the result of the collaboration of the authors who are jointly responsible. The text is attributed as follows: paragraphs 1 and 5 to Andrea Moretti; paragraphs 2 and 4 to Michela C. Mason; paragraph 3 to Luca Gos.

adventure tourism accounts for \$263 billion with an estimated average yearly increase of 65% from 2009 to 2012 (Adventure Tourism Market Study, 2013).

In Italy adventure tourism is showing a significant growth, thanks to the heterogeneous and rich landscape, including both summer and winter sports and ranging from water to inland activities. According to this general tendency, in 2011 the Italian sector was estimated to have produced 6.3 Billion Euros (National Organisation responsible to measure Sport tourism, Borsa per il Turismo Sportivo, B.T.S.).

As adventure tourism continues to expand over the last years, scholars have increasingly attempted to understand the behaviour of this niche of tourism (Manning, 2011). Adventure tourism is a rather ambiguous and complex concept because of its latent, multidimensional and relative nature. It is characterized by elements of physical and psychological challenge, danger and risk, uncertain outcomes and exploration (Swarbroke *et al.*, 2003). A dependent or incidental relationship with the natural environment and a certain amount of skill and a physical exertion can be also considered as constitutive parts of adventure tourism (Lawton and Weaver, 2001). In this context, there is a need to further investigate some crucial aspects of adventure tourism, such as motivations and perceived risk of adventure recreationists, in order to properly define and meet the needs of this target audience.

In the last years, research has revealed that identifying tourist motivations is often the most constructive and effective way to determine appropriate visitor opportunities. Clarifying how these travel motivations influence tourists' behavioural intention, is fundamental for tourism planners and marketers (Beh and Bruyere, 2007; Li *et al.*, 2010). However, the decision-making process that leads to the consumers' evaluations, choices and behaviours is highly complex, and is also strongly influenced by risks perceptions (Campbell and Goodstein, 2001; Cho and Lee, 2006; Lin and Chen, 2009; Prayag and Jankee, 2013).

The present study focuses on the impact of motivations and risk perception in an adventure tourism setting, analysing specifically their relation with behavioural intention in a natural park. Although wildlife is the major attraction for tourists visiting national parks (Acquah *et al.*, 2015), in this particular setting a recreationist can be involved in recreational activities with inherent elements of physical, emotional or psychological risk, danger or uncertain outcomes, which typically take place within a natural environment (Ewert and Vernon, 2013).

Therefore, the aims of the present research are to extend the knowledge about hard adventure tourists in natural parks and assess their motivation, perceived risk and behavior. The purposes of the study can be summarized as follows: (a) to identify the motivational factors of Italian hard adventure tourists; (b) to explore the relationship between dimensions of motivation and behavioural intentions of Italian hard adventure tourists; (c) to classify different "types" of hard adventure tourists (based on their level of risk perceptions) in order to determine similarities and/or differences in term of their behavioural intentions.

This paper contributes to a theoretical understanding of adventure tourists in a natural park in two ways. It intends to determine the key motivational factors that are important for adventure tourists' decision to visit the park, and to analyse the relationship between these motivational factors and their behavioural intention. Secondly, it aims to test whether different levels of risk perceived by adventure tourists are related to their behavioural intentions or not. This relationship is important because unlike other consumption situations where higher risks deter consumers from repurchasing, in adventure tourism higher risks may be associated with more positive behavioural intentions (Prayag and Jankee, 2013). In addition, this study on consumer behaviour has also theoretical and practical value.

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2. Theoretical background

Adventure tourism -that is travelling to explore a “new experience, often involving perceived risk or controlled danger associated with personal challenges, in a natural environment or exotic settings” (Morrison and Sung, 2000, p. 11), has recently grown in popularity as a niche form of nature based tourism. It is characterized, as other nature based forms of tourism, by a dependent or incidental relationship with the natural environment. It should, however, be noted that adventure tourism is differentiated from other types of nature based tourism on the basis of the following three elements: 1) the element of risk in the tourism experience (Ewart, 1989; Hall, 1992; Fennell, 1999); 2) a higher level of physical exertion by the participant (Ewart, 1989); 3) the need for specialized skills to facilitate successful participation (Lawton *et al.*, 2001). Thus adventure tourism is “characterized by its ability to provide the tourist with relatively high levels of sensory stimulation, usually achieved by including physically challenging experiential components” (Muller and Cleaver, 2000, p. 156). Within this type of tourism, mountains, lakes, oceans and the most distant and wildest places represent “escape locations”, giving the tourist a feeling of adventure and risk perception as the below mentioned activities in table 1 (Pomfret, 2006).

Inside the macro-area of adventure tourism, it is possible to identify activities along a continuum ranging from “soft” to “hard” adventure wherein the levels of risk, skill and exertion increase from a minimum to a maximum level. Although highly subjective, this classification overlaps adventure tourism with other types of nature based tourism (e.g. ecotourism) in some soft adventure activities such as wildlife watching, safari and trekking (Lawton and Weaver, 2001). The category of “hard” or “pure” adventure activities includes activities of high personal risks and dangers and the production and the delivery of adrenaline activities (Kane and Tucker, 2004). They differentiate from all the others nature based activities by allowing practitioners to experience speed, high physical exertion or a combination of these factors, that result in a risk perception or in an adrenaline rush feeling for the tourist practicing them.

Tab. 1: Conventional and contemporary adventure tourism activities

Land based		Water based	Air based	Mixed (land/water/air)
Abseiling	Mountaineering ^a	Body boarding	Balloonng	Adventure racing
Backpacking ^a	Orienteering	Windsurfing	Bungee jumping	Charity challenges
Bicycling	Quad biking	Canyoning	Cliff jumping	Conservation expeditions
Caving	Scrambling	Cruise expeditions	Gliding	Cultural experiences
Climbing ^a	Skiing ^a	Kayaking	Hang-gliding	Gap year travel
Dog sledding	Snowboarding	Sailing	Micro-lighting	Hedonistic experiences
Hiking ^a	Snow mobiling	Scuba diving	Paragliding	Spiritual enlightenment
Hunting	Snow shoeing	Snorkeling	Parachuting	Wildlife watching
Horseback riding	Via Ferrata ^a	Surfing	Skydiving	
Safaris-Jungle exploring	Wilderness ^a experiences	Water skiing		
Motorcycling		White water rafting		
Mountain biking		Windsurfing		

^a Backpacking, climbing, hiking, mountaineering, skiing, via Ferrata and wilderness experiences are all mountaineering-related activities.

Source: Adapted from Pomfret, 2006.

Nowadays, existing empirical studies on motivations of adventure tourists seem to need more in-depth research in order to improve the identification of adventure tourists' motivations (Schneider and Vogt, 2012).

Motivation is "the process that accounts for an individual's intensity, direction, and persistence of effort toward attaining a goal" (Robbins, 2003, p. 155) or "the need that drives an individual to act in a certain way to achieve the desired satisfaction" (Beerli and Martin, 2004, p. 626). Another definition is the one proposed by Pizam, Neumann, Reichel, (1979), which refers to travel motivation as "the set of needs which predispose a person to participate in a touristic activity" (Pizam *et al.*, 1979, p. 195). As motivation can be defined the driving force behind all behaviours (Fodness, 1994; Gnoth 1997; Prebensen *et al.*, 2013), while research on motivation can be fundamental for understanding the reasons for participating in adventure tourism (Ross and Iso-Ahola, 1991).

Thus, motivation is a critical variable for explaining tourist behaviour. It has been employed as a fruitful criteria for segmentation in a large number of studies and in different settings including natural parks (e.g. Kerstetter *et al.*, 2004; Rid *et al.*, 2014; Tangeland *et al.*, 2013). Buckley presented a meta-analysis of adventure tourists' motivations for participating in tourism activities (Buckley, 2012). Some of these are known to be relaxation, to see different places, to discover new cultures, to swim, etc. Nearby them,

there are some other reasons like to feel rush, thrill or the enjoyment of risk. These latter elements can also be accepted as core ingredients of tourism for participants' motivation. Adventure by definition involves elements of risk that are extremely attractive to adventure tourists. We argue for the thesis that risk perception (Beck, 1992) is a combination of thrill and excitement. This definition comes very close to the concept of "rush" that is defined by Buckley as simultaneous experience of thrill and flow that is a more complex construct (Csikszentmihalyi, 1990). They are "associated with the successful performance of an adventure activity at a high level of skill" (Buckley, 2012, p. 963).

In tourism literature several studies indicate that motivation influence the following consumption behaviour such as behavioural intentions (Prayag and Grivel, 2013; Schofield and Thomson, 2007). Behavioural intentions have been defined as the "degree to which a person has formulated conscious plans to perform or not some specified future behaviours" (Warshaw and Davis, 1985, p. 214). Willingness to repurchase and recommending the tourism service to others are the two main elements that characterized behavioural intentions (Chi and Qu, 2008; Del Bosque and Martín, 2008; Ryu, Han, and Kim, 2008).

Following the approach of the behavioural model proposed by Needham and Rollins for nature based tourism (Needham and Rollins, 2009) deriving from the experience based management (Manfredo *et al.*, 1983) we postulate that adventure tourists are engaged in certain activities in a specific setting in order to fulfil their specific motivations and to realize benefits or outcomes (Acquah *et al.*, 2016). Thus, we investigate the relations between motivations and the response to them (i.e. behaviour) in a particular setting (i.e. a natural park) of tourism where particular activities (i.e. hard adventure activities) are practiced. Specifically, we analyse the risk perception as part of the key motivational factors in adventure tourism and how different levels of perceived risk are associated with the various high adventure tourism activities and their relation with the behavioural variables.

3. Methodology

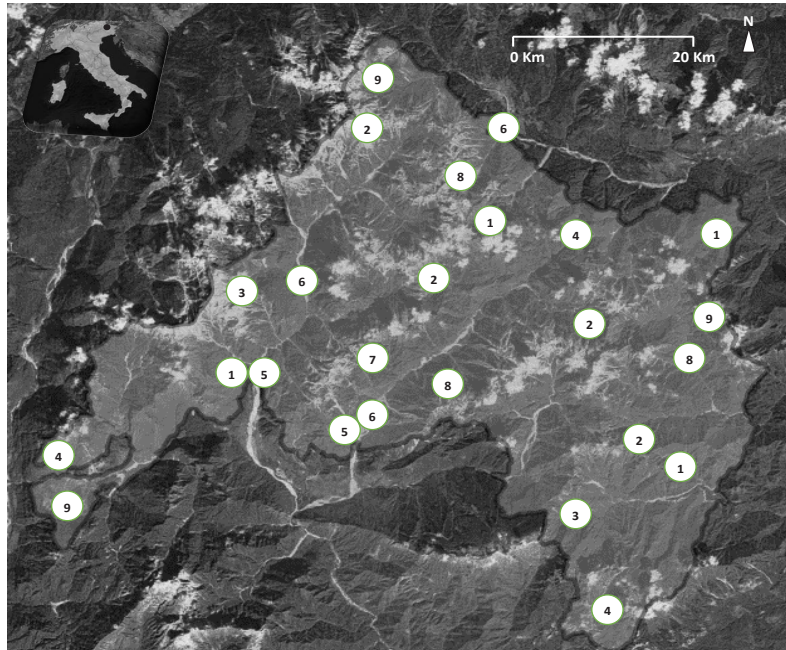
Data collection was performed at the *Friuli Dolomiti* Alps Natural Park in spring 2014. This park is located in the western mountain zone dominating the upper plain of *Friuli Venezia Giulia* region (North East of Italy). The area extends over 36,900 hectares and it is characterized by the wilderness of its large valleys surrounded by the Dolomites. This is a protected area that extends in the Friuli-Venezia Giulia region, from the province of Pordenone to the province of Udine, including also Valcellina and the upper valley of river Tagliamento (see Figure 1). The area is characterized by a high degree of "wilderness", given by the absence of connecting roads. Among the captivating features of its landscape is the huge variety of plants and animals that enhances its attractiveness for outdoor enthusiasts.

For example, the morphology of the mountains of the area, the rains and the particular carbonate rocks such as limestone and dolomite, make the park attractive for canyoning and rafting.

Since adventure tourists seek recreation experiences that differ from those available through other outdoor activities (Berns and Simpson, 2009) the present paper in order to avoid overlapping with other tourism types (e.g. ecotourism) focuses on a sample of adventure tourists selected on the basis of their participation to hard adventure.

As showed in figure 1, nine hard adventure activities were chosen for the aim of the present research (i.e. Trekking; Wilderness hiking; Mountain climbing; Mountain biking; Rafting; Canyoning; Hang Gliding; Downhill bike and Orienteering).

Fig. 1: the study area



Legend	N°
Trekking	1
Wilderness hiking	2
Mountain climbing	3
Mountain biking	4
Rafting	5
Canyoning	6
Hang Gliding	7
Downhill bike	8
Orienteering	9

Source: Authors' data and calculations

Self-administered questionnaires were used in this study. The core part of the questionnaire involved motivations for the hard adventure tourists' participation. A number of 317 tourists were randomly selected in the sample from a large population of hard adventure tourists of the Friuli Dolomiti Alps Natural Park. The sampling procedure was a systematic sampling, one every three hard adventure tourists (Mason and Moretti,

2015). This method selects elements from an ordered sampling frame; it is functionally similar to simple random sampling, because each element in the population has a known and equal probability of selection (Bowerman *et al.*, 2004). Nevertheless in the present paper hard adventure tourists were sampled in a specific context (i.e. a natural park), thus generalizability to larger settings can only be ensured on the basis of replication across different contexts, subjects, stimuli, and responses (Dipboye, 1990; Lynch, 1982). The sample size is in line with those used by other adventure tourism studies (e.g. Giddy and Webb, 2015). The researcher collected all data personally during holiday periods. The survey questionnaire consists of three parts: part 1 addresses motivations; part 2 deals with the perception of risk; part 3 deals with general characteristics (socio-demographics). All scale items were measured through a 7-point Likert scale ranging from Strongly Disagree (1) to Strongly Agree (7). The sample characteristics are summarized in Table 2. Data were analyzed through descriptive statistics (mean score and standard deviations), factor analysis, stepwise regression and ANOVA. Furthermore, a Scheffe post hoc procedure was carried out in order to determine whether the different levels of adventure tourists' risk perception differ or not in their response to the five behavioural variables.

4. Results

The general sociodemographic characteristics of tourists interviewed is presented in Table 2. The sample was equally distributed by gender (49.8% male and 50.2% women). Tourists were predominantly relatively young: 71.92% were between 19 and 29 years old, 0.63 % under 19, 8.2% between 30 and 39 years old, 8.83% between 40 and 49, 7.89% between 50 and 65 and only 2.53% around 65 or older. Tourists in the sample showed high levels of education on average, as 64.35% of respondents had a high school degree, 32.18% a college degree or higher and only 2.84% had a junior high school level of instruction.

Tab. 2: Sociodemographic profile of respondents

Socio-demographic variables of survey respondents (N=317)			
		Percentage	No.
	Gender		
Male		49.80%	158
Female		50.20%	159
	Age		
Less than 19		0.63%	2
19-29		71.92%	228
30-39		8.20%	26
40-49		8.83%	28
50-65		7.89%	25
65 and above		2.53%	8
	Educational level		
Primary school		0.63%	2
Junior high school		2.84%	9
Senior high school		64.35%	204
University or above		32.8%	102

Source: Authors' data and calculations

The motivational items were defined according to the literature on leisure motivation and specifically to the Recreation Experience Preference (REP) scale that was developed within the experiential approach, to measure what motivates people to perform activities in natural areas (Manfredo *et al.*, 1996). Means and standard deviation of the items motivation were also reported to determine which of the motivations were the most important ones (table 3).

Tab. 3: Mean score and standard deviation of the motivation items

Motivation items	Source	Mean	Standard deviation
To enjoy natural resources	Kim <i>et al.</i> (2003)	5,47	1,608
Experience peace and quiet in nature	Tangeland <i>et al.</i> (2013)	5.15	1.587
To appreciate beautiful natural resources	Kim <i>et al.</i> (2003)	5.57	1.282
Experience fellowship whit nature	Tangeland <i>et al.</i> (2013)	5.30	1.381
Experience the landscape and moods of nature	Tangeland <i>et al.</i> (2013)	6.29	1.044
To be where things are natural	Manfredo <i>et al.</i> (1996)	5.34	1.462
To be close to nature	Manfredo <i>et al.</i> (1996)	6,17	1,006
To enjoy the natural scenery	Manfredo <i>et al.</i> (1996)	4.65	1.633
To enjoy fauna and flora	Tangeland <i>et al.</i> (2013)	5.29	1.549
To have thrills	Manfredo <i>et al.</i> (1996)	3.76	1.776
To experience excitement	Manfredo <i>et al.</i> (1996)	4.66	1.770
To experiance in the paced nature of things	Manfredo <i>et al.</i> (1996)	3.10	1.567
To feel exhilaration	Manfredo <i>et al.</i> (1996)	3.38	1.763
To take the risks	Manfredo <i>et al.</i> (1996)	4.94	1.569
To change dangerous situations	Manfredo <i>et al.</i> (1996)	5.90	1.192
To rest and relax	Beerli and Martin (2004)	3.77	1.683
To get away from the hustle and the bustle	Tangeland <i>et al.</i> (2013)	5.66	1.377
To change from daily routine	Tangeland <i>et al.</i> (2013)	3.93	1.581
To have time to think about life	Tangeland <i>et al.</i> (2013)	3.57	1.636
To find peace and quiet	Tangeland <i>et al.</i> (2013)	3.43	1.682
To get away from everyday life	Tangeland <i>et al.</i> (2013)	4.03	1.664
To have a time for natural study	Kim <i>et al.</i> (2003)	5.09	1.581
To have enjoyable time with family/friends	Kim <i>et al.</i> (2003)	5.17	1.437
To be with others who enjoy the same things you do	Manfredo <i>et al.</i> (1996)	5.09	1.429

Note: Individuals were asked to indicate their level of agreement on a 7-point Likert scale ranging from 1-strongly disagree to 7-strongly agree.

Source: Authors' data and calculations

To examine the dimensions underlying the motivation factors a principal component factor analysis with varimax rotation was undertaken. The 24 motivation factors items yielded four factors with eigenvalues greater than one (table 4). The first factor loaded on nine items and was called "Nature". The second factor was named "Risk Perception" and loaded heavily on six items. The third factor called "Contemplation" loaded on six items. The final factor labelled as "Socialization" loaded on three items. The Kaiser-Meyer-Olkin statistic that measures sampling adequacy for the motivation scales was 0.883. As shown in table 4 these four motivation dimensions accounted for 60.86% of explained variance.

Similar to other studies (e.g., see Saayman and Dieske, 2015; Buckley, 2012), nature, risk, contemplation and socialization emerged as the most relevant motivational factors to bring adventure tourists to protected areas.

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Tab. 4: Motivation factors

Motivation factor	Factor 1	Factor 2	Factor 3	Factor 4
Motivation Item	Nature	Risk	Contemplation	Socialization
To enjoy natural resources	0.764	0.138	0.056	0.134
To experience peace and quiet in nature	0.735	0.064	0.125	0.254
To appreciate beautiful natural resources	0.727	0.099	0.223	-0.013
To experience fellowship whit nature	0.713	0.008	0.149	0.306
To experience the landscape and moods of nature	0.704	0.029	0.298	-0.029
To be where things are natural	0.692	0.014	0.247	-0.065
To be close to nature	0.661	0.083	-0.028	0.394
To enjoy the natural scenery	0.643	0.300	0.027	-0.073
To enjoy fauna and flora	0.616	0.365	-0.116	0.234
To have thrills	0.121	0.846	0.121	0.076
To experience excitement	0.174	0.824	0.158	0.012
To experience in the paced nature of things	0.236	0.787	0.120	0.120
To feel exhilaration	0.115	0.743	0.146	0.124
To take the risks	0.127	0.699	0.283	0.060
To change dangerous situations	-0.065	0.642	0.195	0.353
To rest and relax	0.005	0.353	0.717	0.061
To get away from the hustle and the bustle	0.236	0.176	0.710	0.165
To change from daily routine	0.089	0.147	0.692	0.386
To have time to think about life	0.322	0.139	0.597	-0.196
To find peace and quiet	0.037	0.495	0.514	0.120
To get away from everyday life	0.386	0.138	0.467	0.269
To have a time for natural study	0.157	0.154	0.101	0.787
To have enjoyable time with family/friends	0.149	0.170	0.306	0.742
To be with others who enjoy the same things you do	0.466	0.335	-0.045	0.494
Eigenvalue	5.082	4.356	2.889	2.280
Variance Explained	21.174	18.150	12.039	9.499
Cumulative Variance	21.174	39.325	51.364	60.863
Cronbach's Alfa	0.884	0.889	0.808	0.744
Grand Mean Of Factor	5.542	3.685	4.469	5.306
Keiser Meyer Olkin statistic	0.883			

Source: Authors' data and calculations

Regarding behavioural intention, descriptive statistics were used to evaluate mean and standard deviation. Moreover, exploratory factor analysis, using principal component methods with varimax rotation, was used to summarize the five behavioural items in order to run the regression analysis. Table 5 and 6 provide statistics information, including the mean, standard deviation for the dependent variable behavioural intention as well as the results of the factor analysis.

Tab. 5: Mean scores, standard deviations and factor loading of the five intended behaviour variables

Behavioural variable	Source	Mean	Standard deviation
I would spread positive word-mouth about this park	Maxham 2001	5.74	1.21
I will recommend this park to friends/relatives	Maxham 2001	4.84	1.78
I intend to revisit the park	Huang & Hsu 2009	5.62	1.28
I desire to revisit the park	Huang & Hsu 2009	5.52	1.31
If my friends were looking for a park to visit, I would tell them to try this park	Maxham 2001	5.43	1.43

Note: Means were derived from a 7-point Likert scale ranging from 1-strongly disagree to 7-strongly agree.

Source: Authors' data and calculations

Tab. 6: Results of factor analysis

Behavioural variable	Factor Loading
I would spread positive word-mouth about this park	0.876
I will recommend this park to friends/relatives	0.576
I intend to revisit the park	0.938
I desire to revisit the park	0.954
If my friends were looking for a park to visit, I would tell them to try this park	0.915

	Eigenvalues	Per cent of variance	Alpha coefficient	Grand mean of Factor	Keiser Meyer Olkin statistic
Behavioural variable	3.726	74.516	0.889	5.43	0.831

Source: Authors' data and calculations

To identify which of the four tourists' motivation factors (predictive variables) is more related to respondents' behavioural intentions (dependent variable) we used a stepwise multiple linear regression. The stepwise regression starts with no candidate predictive variables in the model, testing the addition of each variable using the R-squared test, adding the variable that improves the model the most. After each step in which a variable is added, all candidate variables in the model are checked to see if their significance has been reduced below the tolerance level. If a no significant variable is found, it is removed from the model. Table 7 contains the results of the regression. As can be seen in the table only the motivation factor named "nature" contributed to the dependent variable, suggesting that this is the only factor ($\beta = 0.596$; $p < 0.001$)² to face adventure tourists' behavioural intention.

² Technically, p values cannot equal 0. Some statistical programs do give you p values of .000 in their output, but this is likely due to automatic rounding off or truncation to a preset number of digits after the decimal point. So, consider replacing "p = .000" with "p < .001," since the latter is considered more acceptable and does not substantially alter the importance of the p value reported. And p always lies between 0 and 1; it can never be negative.

Tab. 7: Regression analysis results ^a

	Non Standardized Coefficient B	Standardized Coefficient β	t-value	Sig.
Constant	6.241	-	4.749	0.000***
Nature	0.491	0.596	13.158	0.000***
Values	Durbin-Watson	R ²	Adjusted R ²	
	1.984	0.355	0.353	

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^a dependent variable behavioural intention.

* p significant at 0.05 level; ** p significant at 0.01 level; *** p significant at <0.001 level.

Source: Authors' data and calculations

In a nutshell, it can be said that the “nature” motivation factor only had a significant relationship with behavioural intention. This seems to be partially in contrast with previous studies showing that, adventure tourists use outdoor natural environments as a setting for excitement-based recreation rather than appreciation of nature (e.g. Buckley, 2010). However, it must be pointed out that only few studies on adventure tourism have linked behaviour with nature and landscape elements, despite the most significant aspect of the tourism experience remaining the visual one (Giddy and Webb, 2015). In such perspective, adventure activities would not be considered as tourism without the unique location as its background (Urry and Larsen, 2011).

These findings call for a more in depth examination of risk perception, considered in literature as the key motivational factor for commercial participation in adventure tourism and specifically, its relationship with behavioural intention.

In table 8 descriptive statistics are provided simply as a way to characterize tourists’ risk perception related to their participation in the different “hard” adventure tourism activities that we have considered in the present study. The table shows a low discrepancy between the perception of risk and the objective risk that is related to each activity. Specifically, it appears that hang gliding was differentiated as the most risky activity followed by mountain climbing and canyoning. No big differences were observed for the other types of activities, although, on relative basis orienteering was ranked as the least risky activity and trekking as the second lowest one.

Tab. 8: Perceived level of risk for tourism activities

Perceived level of Risk for tourism activities	Mean	Standard Deviation
Trekking	1.85	1.37
Wilderness hiking	1.88	1.27
Mountain climbing	4.17	1.52
Mountain biking	2.89	1.40
Rafting	2.10	1.22
Canyoning	3.51	1.58
Hang Gliding	5.06	1.85
Downhill bike	2.16	1.28
Orienteering	1,30	1,01

Source: Authors' data and calculations

Regarding risk perception, the percentage of responses to the given seven-point Likert scale was grouped as “Low Risk” when the classification was 1 or 2 (N = 112), “Medium Risk”, when the classification was 3 or 4 (N = 119) and “High Risk”, for classifications from 5 to 7 (N = 85).

The results of ANOVA tests reveal that all five items contributed to differentiating the three risk perception clusters. In addition, the Scheffe post hoc tests were employed to examine any differences between clusters with respect to each of the factors. The results of the Scheffe tests show that statistically significant differences were found between clusters, thus supporting the fact that distinct clusters had indeed been identified (i.e. low risk perception, medium risk perception, high risk perception). The results are presented in table 9. The results show that a low risk perception seems to be associated to stronger tourists’ positive word of mouth and a stronger intention to revisit the park.

Since we are investigating hard adventure tourists who are involved in hard activities that require a high level of skill, personal competence and control in a given situation (i.e. high level of self-efficacy), we have to consider that their perceived self-efficacy influences the perceptions of circumstantial risk (Yates and Stone 1992; Bandura and Wood 1989). These subjects believe that they are very competent, they perceived more opportunities and fewer risks. Thus, these hard adventure tourists’ high levels of perceived self-efficacy can decrease the perceptions of circumstantial risk.

Tab. 9: ANOVA and post-hoc test

Behavioural Intention Items	Low Risk	Medium Risk	High Risk	F-ratio	Sig. Level
I would spread positive word-mouth about this park	5,99***	5,45***	5,88	7,89	0,000***
I will recommend this park to friends/relatives	5,10*	4,59*	4,64	3,16	0,044*
I intend to revisit the park	5,84**	5,37**	5,64	4,94	0,008**
I desire to revisit the park	5,76**	5,28**	5,44	5,13	0,006**
If my friends were looking for a park to visit, I would tell them to try this park	5,73**	5,16**	5,08	6,68	0,001***

* p significant at 0.05 level; ** p significant at 0.01 level; *** p significant at <0.001 level.

Source: Authors' data and calculations

5. Conclusions

This study on consumer behaviour examined a sample of Italian nature based tourists (i.e. hard adventure tourists) visiting a natural park. In Italy there is an admirable research on ecotourism (Anselmi, 2010; Galli and Notarianni, 2002; Montanari, 2009; Pencarelli and Splendiani, 2010), but there is still a lack of investigation on adventure tourism. The present contribution focuses on the analysis of three main aspects of adventure

tourism (i.e. motivations, perceived risk and behavioural intentions) to understand more about this phenomenon in Italy.

Effective marketing strategies for the promotion of adventure tourism settings (i.e. natural parks) are generally based on the analysis of tourists' motivations as driving forces in travel behaviours (Bradley *et al.*, 1997; Cini *et al.*, 2013; Raj, 2004; Um, Crompton, 1990). In line with this view, important findings from this study are discussed. First, the analysis of motivation factors in relation to participation of hard tourism adventure activities provides evidence that "activity related motivations" is a multi-dimensional phenomenon comprising four distinct motivational factors (i.e. Nature; Risk Perception; Contemplation and Socialization). Second, the findings do not completely support the proposition that adventure tourists use outdoor natural environments as a setting for excitement-based recreation rather than their appreciation of nature (like the recreationists). More specifically, the stepwise multiple linear regression results show only one positive significant relationship between motivational factor and tourists' behavioural intention, i.e. the "nature". Our results suggest there is a demand for high adventure activities focusing on "nature" themes. This finding appears in line with the "responsible" approach of nature-based tourism (of which adventure tourism can be considered a particular kind): in nature-based tourism, tourist motivations are increasingly concentrating around sensitivity for nature, and for local culture and landscape (Del Chiappa, Grappi, Romani, 2009). We showed that the natural environment is the key motivational factor in order to revisit the park and to spread a positive word of mouth. Hence, it is necessary to promote adventure tourism focused on the natural environment.

Finally, ANOVA analysis showed that the different levels of adventure tourists' risk perception differ in their response to the behavioural variables. More specifically, a low risk perception seems to be associated to stronger tourists' positive word of mouth and intention to revisit the park. Also, we found that tourists who express a low risk perception are associated to a stronger behavioural intention. Perception of risk is an important component in the tourists' behavior, but in hard adventure tourism activities, which involve high-risk and skills, our study pointed out that there is a statistically significant relationship between the level of risk perception (in particular low risk) and behavioral intention.

In addition, these findings offer several managerial implications for both private and public adventure tourism providers. An organization needs to evaluate the individual ability of adventure tourists in order to ensuring low risk perceptions instead of still retaining "the intense emotional component that comes from adventure" (Holyfield, 1999, p. 3). They need to specialize on one market of adventure tourism, such as beginners and advanced, and tailor their service in a tight integration of naturalistic fruition and adventure activities. In the Italian context these activities are mostly left to the free initiative of single individuals.

The development of synergies between the public and private sector can be powerful drivers for increasing adventure tourism potential. Many case studies concerning Italian tourist systems (e.g., Barile *et al.*, 2007; Della Lucia *et al.*, 2007; Silvestrelli and Bellagamba, 2007; Sciarelli *et al.*, 2007;

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Della Corte *et al.*, 2007; Cerquetti, *et al.*, 2007, Rossi, *et al.*, 2007, Bonel *et al.*, 2005, Baccarani, *et al.*, 2007) have emphasized how systems (except for the Dolomiti case, and, to some extent, also Lake Garda) generally present competitive structural weaknesses, mainly related to the relationships between the private and public sector, and interfirm cooperation (Della Corte *et al.*, 2007). Moreover, risk-based adventure tourism provides bright potentials especially if it is centered on the correct use of natural resources.

It is worth to note that, all the activities that can be performed within a park must respect all its local characteristics (i.e. natural, anthropological, landscaping, historical, and cultural characteristics) in order to preserve the desired territorial identity (Menguzzato, 2013; Barile and Golinelli, 2008).

As with any study, this study has various limitations, which provide future research opportunities for others to explore the adventure tourists' behaviour. The study is limited to a specific Italian destination (i.e. a natural park) furthermore the analysis and the measure should be replicated in different contexts in order to test their adaptability to different adventure tourism destinations. Another important limitation is the cross-sectional nature of the data. Future research should explore these relationships over time.

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Back to the future

Maurizio Rispoli - Michele Tamma

1. Introduction

The profound changes taking place in the world of production in the last quarter of (the 20th) century are putting into relief, among other things, some significant contradictions and inadequacies in the theories that have dominated economic analysis and interpretation in recent decades. This explains the efforts from various analytical perspectives currently devoted to “updating” theories that address the behavior of production organizations, based on data provided by empirical evidence and grounded in contextual and procedural approaches.

Within this context, the purpose of the present article is to dispute the separation between goods and services as a necessary starting point for any economic analysis. This separation still appears largely rooted in, and related to, the juxtaposition of *materiality* (generally associated with goods) and *immateriality* (generally associated with services).

After a brief introductory summary of the evolution of the capitalist production system within which we contextualize our discussion, we consider the principal factors at the root of the separation between goods and services, emphasizing their actual and theoretical reconciliation. The second part of the article proposes a reconsideration of the concept of product, conceived as the output of a production process of any kind and created to be exchanged between the producer and other economic agents (whether agents of production or consumption).

Using this definition with the goal of overcoming the goods/services juxtaposition definitively and adopting a new perspective concerning the phenomenon of production, we highlight, first, the cluster of characteristics that lead us to conceive of an *abstract product* as opposed to concrete products and the path necessary to shift from the former to the latter. Next, we point out the utility of the concept of product, both as a medium of interaction and a medium of distinction, in analyzing phenomena related to production.

2. The evolutionary pattern of production

Because the term “industrial” appears expressly related to machinery, facilities, and plants - that is, to the stereotype of the factory - in this paper we will use the term “productive capitalism” to refer to any kind of product or production. With this terminology, we intend to explain the intrinsically

¹ The paper was originally published in issue n. 29 September-December 1992 on “Economia delle risorse immateriali”.

evolutionary reality that developed, beginning in the second half of the eighteenth century, through what some economic historians call the “first industrial revolution”². Very briefly, we affirm that this reality derived from the combination of the scientific method of production and the competitive flexibility of economic structures (regulated by the market), socio-political structures (regulated by democratic debate), and scientific structures (regulated by the freedom of research). This combination accelerated over the years and has largely characterized (despite many lingering deficiencies and periods of crisis) the development of the most advanced social and economic systems³.

The dominating characteristics of production that emerged during the first 100 years of the industrial revolution are widely known. Such production is traditionally seen as existing in opposition to artisanal production, which is usually characterized by the practical and difficult-to-replicate knowledge of the craftsman/businessman himself.

This first stage of industrialization was characterized by a production system based on knowledge that was gradually replicable; however, such knowledge was dispersed among a wide number of single factories, with machines that were neither connected to each other nor with those in other production units; they were characterized by high labor intensity and the use of rather few and still elementary technologies. Between the nineteenth and the twentieth century, a second evolutionary stage of industrialization took place. In this stage many new characteristics were added that led to a significantly different mode of production from that which had developed in the previous stage. This new stage of production was made possible by the application of a cluster of scientific discoveries in energy, chemistry, metallurgy, mechanics, foodstuffs, medicine, and others, all rapidly absorbed and operationalized by the capitalistic system⁴. Thus a new production system developed that was far more complex than its predecessor. Such complexity derived, on the one hand, from the development of interconnections between network supplies (electricity, gas, water, telegraph, telephone), transportation networks, and vertical and horizontal relations between companies resulting from the fragmentation of production cycles. On the other hand, this new complexity also derived from the increasing role of stock exchanges as regulatory structures that evolved from the traditional limited companies; by the new social status acquired by labor unions that led to the diffusion of industrial relationships; and by the emergence of the organization as a fundamental

² We are referring to Lazonick’s approach, presented during the “2nd International Week of History and Business Studies” (Terni, October 1987). This scholar distinguishes between the first, second, and third industrial revolution.

³ The characterization of the capitalistic production system quickly summarized in this section refers to the interpretive model that can be found in the second chapter of the book *Transizione tecnologica e strategie evolutive. L’impresa industriale verso l’automazione* (Di Bernardo and Rullani 1985, pp. 93-124).

⁴ “There is no doubt that, during these thirty years (from the end of the nineteenth century to the beginning of the 1900s) there was a real shift in terms of the wealth of knowledge available for production; the technical landscape at the beginning of the 1900s was radically different than the one that developed after the beginning of the industrial revolution” (Saraceno, 1970, p. 15).

dimension of all decision-making and management processes developing within production companies.

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Michele Tamma
Goods and services,
that is, products

A further groundbreaking change seems to have begun in very recent times, during the 1970s, with the flourishing of effects that resulted from the application of a new technical-economic paradigm⁵ based on the combination of microelectronics and information and communication technologies. New communication technologies made automation flexible where it had once been rigid and made some scale economies lose their relevance. They also allowed for the diffusion of a different mode of information management, the importance of which, today, is increasingly necessary for any production activity.

With this third phase, the absolute, essentially *a priori*, separation between goods and services that guided and conditioned analysis and theoretical interpretation - and as a consequence also actual operational practices - for so long, is showing its substantial inadequacy. For many decades, during the second developmental stage of capitalism, the production system increasingly evolved toward the mass production of goods, by means of what we traditionally know as “industry”, while services were generally considered as pre-industrial production, or even artisanal production. It is by now well known, however, that a number of services are obtained through methods similar to those we typically associate with industry and mass production. Some examples are widely acknowledged: automated banking services, supermarkets, automatic car washes, telematic networks, fast foods, and computerized medical analyses (Levitt, 1976; Thomas, 1978); additional examples, in our opinion, are catering, collective transportation, and hotel hospitality supplied by large companies. In all of these cases, the product relates directly to the characteristics of a standardized, mass production. Moreover, the production process of the businesses that offer these services is characterized by economies of scale, deriving from the indivisibility of production plants, and by economies of replication, made possible by standardization (Di Bernardo, 1991; Rispoli, 1992, 209).

All in all, today we can affirm that there are products - goods and services - that are obtained through production methods traditionally attributable to industrial production (even if made innovative through modern technologies); other products - goods and services - are instead obtained through methods traditionally and substantially artisanal in form⁶.

⁵ With this term, we consider the enormous change that occurs as a result of technological evolution, which goes beyond any single, episodic innovation, even if a radical one. Such change involves, generally and transversely, the entire production system. It can be identified as the fourth type in the taxonomy of Freeman and Perez (1987) and allows us, in our opinion, to separate the three industrial revolutions to which we refer.

⁶ In our opinion, Rullani (1988) came to similar conclusions: “that which identifies the industrial mode of production and forms the basis of industrial capitalism is the use of machines and of scientific technology as the primary means by which to generate economic value. It becomes in this sense less relevant that this utility (...) is associated, or not, at the moment of sale to a physical good that is transferred by the company to the customer”. Conversely, “the main trait of all activities that resist industrialization (artisanal or tertiary activities) is the impossibility of reducing them to abstract and reproducible processes that can be delegated to machines and scientific procedures”, regardless of whether they are goods or services.

3. The separation of goods and services

Even after having proposed combining goods and services within the product category, we must not forget the basic elements from which the traditional theoretical separation between them originated. On closer analysis, it appears that industrial economists, business economists, and marketing scholars have concentrated their attention on at least three categories of diversity that have also informed their respective approaches:

- 1) some differences generally observed in the characteristics of the output (i.e., the result of the production process);
- 2) some differences characterizing the production/distribution processes;
- 3) differences in terms of the attitudes and behaviors of users, whether business producers or individual consumers.

With respect to the first point, we can refer to the differences most frequently noted by scholars investigating services: tangibility, storability, transportability, the possibility to present and show the results of production - characteristics that, while present in goods, might not be found at all in services (Berry, 1980; Cherubini, 1981; Flipo, 1989; Lejeune, 1989; Lovelock, 1983; Pivato, 1982; Sasser, 1976; Shostack, 1982).

Regarding the differences characterizing the production/distribution process, the aspects typically cited are: the simultaneity between production and utilization processes; the interaction between consumers and employees; the importance of direct, human factors in production; replicability and therefore the degree to which production can be standardized (Lovelock, 1983; Eiglier and Langeard, 1988; Vicari, 1983). All of these are present differently in the production of goods and the production of services.

Finally, with respect to users' attitudes and behaviors, scholars have generally cited the degree of subjectivity in users' valuation and the possibility for users to display status "symbols", with the former typical of services and the latter typical of goods (Cercola, 1990; Cherubini, 1981; Parasuraman *et al.*, 1985).

The differences noted above have led scholars to analyze goods and services differently, first in the use of the concept of sector and then in industrial organization studies. This approach was likely established among scholars because, if we adopt criteria to identify sectors based on output (i.e., criteria essentially related to commodity: chemical products, energy products, metallurgical, mechanical, textile products, and so forth), we end up subdividing goods into many categories while grouping all services into a single category characterized by a common element: the absence of any kind of physical or *material* characteristic that could allow us to aggregate them in subsets, as we can in the case of goods.

Similar conclusions have historically been drawn by adopting the characteristics of the production process rather than the nature of the output as criteria of classification. In the case of goods, technological progress has enormously enriched, and differentiated, the diverse technologies in "industrial" terms and the industrial sectors have consequently been identified in terms of the differences in the production processes based on diverse technologies (e.g., chemical, metallurgical, mechanical, and

textile technologies); services, however, have never been approached in terms of industrial production processes by adopting a broader concept of technology (Porter, 1985; Faccipieri, 1989). Instead, as already noted, they have been addressed in terms of artisanal production. The ultimate result of this approach was the introduction of a residual sector - neither agriculture nor industry - known as the tertiary sector.

The use of the characteristics of output and production processes with the aim to create a sectoral taxonomy has actually produced, we conclude, absolutely asymmetric outcomes with regard to, on the one hand, the goods and, on the other, the services.

Essentially, in order to describe the production of goods for the purposes of industry analysis, our goal was to focus primarily on output (i.e., product), which is easily identifiable because of its specific, material quality: *“In product-oriented businesses, the physical reality of the product provides a simple but powerful base on which to build a business description”* (Thomas, 1978, p. 156). Secondly, we introduced other elements that accompany the specific productive process, particularly the technologies employed; finally, we added other elements such as the qualitative and quantitative aspects of demand, supply markets; the specific characteristics of human resources, and other relevant elements from an economic/managerial perspective.

In the absence of the requisite of materiality (or even assuming its absence), instead, the common starting point for analyzing and describing services appears to have been the production process and the type of customer. This approach begs the following questions: first, how are services produced? Next, for what kind of users are they produced? This sequence leads directly to the identification of the tertiary “category”, and then to differentiate the tertiary sector for production - defined by many authors as advanced tertiary⁷ - from the tertiary sector for consumption.

In fact, there has never been a serious effort to render services and goods homologous, which would have required scholars first to address the problem of defining exactly what is produced. The problem was only superficially resolved, instead, by introducing the concept of immateriality, which, in all its vagueness and ambiguity, exhibits the traits of a “non-characteristic” (of little significance).

With the present article, we aim to draw attention precisely on the need to adopt new lenses through which to look at the phenomenon of production and, particularly, to the theoretical separation of goods and services still rooted so strongly among many business practitioners and management/economics scholars.

4. The factual and theoretical reconciliation of goods to services

In proposing a somewhat new perspective, we are aided by the changes that are taking place in this current, third evolutionary stage of productive capitalism. Novel elements are clearly emerging and are now easily identifiable. At the same time, this evolutionary stage is increasingly revealing contradictions and internal inconsistencies in traditional economic models,

⁷ See Frey (1987) for a review of the debate on the topic.

as has been demonstrated by many recent contributions to topics such as the relation between goods and services, and between industrial and tertiary sectors (Crozier and Nonnann, 1992; Di Bernardo, 1991; Normann and Ramirez, 1991; Rullani, 1992; Schlesinger and Heskett, 1992).

What is currently occurring is a transferral process from the dynamics of economic reality to the dynamics of economic theory. This emerges in all those situations in which changes in the world of production trigger deep revisions of the analytical and descriptive frameworks underlying our theoretical constructs (Volpato, 1989, p. 111).

There is strong agreement today among scholars that production activities - much more clearly than in the past - present characteristics that are clearly ascribable to both the production of goods and to the production of services. However, it must also be noted that their arguments and the reasons authors cite to justify the reconciliation of the two forms of production cannot all be placed on the same level. The different contributions of scholars can be summarized and grouped around several principal themes:

- a) the complementarity between the industrial and tertiary sector, which is made increasingly apparent by the evolution of economic and production systems in the most advanced countries (Costa, 1990; Di Bernardo, 1991; Vaccà, 1980)⁸;
- b) the evolution of production processes in manufacturing have allowed greater variety in the production of goods while attenuating the character of mass production of many goods and moving them closer to a “customized production” model (e.g., applications of microelectronics and information and communication technologies). Simultaneously, the introduction of new technologies in service production has moved it closer to the characteristics of industrial production (Levitt, 1976; Thomas, 1978; Rullani, 1992)⁹;
- c) the recognition that all the activities in the value chain (even those supporting production of an essentially tertiary nature) can allow for the development of sustainable competitive advantages (Quinn *et al.*, 1990; Normann and Ramirez, 1991);
- d) the “degree of materiality” that can be attributed to single products. Ideally, products could be distributed along a continuum, the extremes of which could be total materiality on the one hand and total immateriality on the other (Shostack, 1982; Sasser *et al.*, 1978;

⁸ Regarding the complementarity between the industrial and the tertiary sectors, it seems necessary to us to observe that it should not suggest that services are functional to the production of goods; rather, it should suggest a proper complementarity, in terms of a variable combination between the typical characteristics of the production of goods and services. We can also add that there is a need to abandon the reductionist perspective on which the vision of tertiary-as-a-sector is based. We must increasingly try to consider the production system as a “holistic reality that organizes within itself specialized functions (industrial and tertiary) to produce value as an undivided system, with joint production between different parts” (Rullani 1988, p. 22).

⁹ Rullani’s recent proposal appears particularly enlightening to us: “(...) new information technologies offer manufacturing the technical support that was lacking until now, in order to allow the tertiary sector to apply scientific and mechanized production techniques” (1992).

Cherubini, 1981). Note that the concept of a continuum is based on two aspects that are undoubtedly connected, but not necessarily coincident:

- I. the assumption that all products are in fact packages that contain and integrate (to different extents) goods and services (and so material and immaterial elements) (e.g., Chase and Erikson, 1988; Normann, 1984; Thomas 1978);
- II. the different “informational content” for simple as opposed to complex products, for which material support assumes less importance (or is not necessary at all) (Rullani, 1989; Rispoli and Tamma, 1991, pp. 19-23).

Two general considerations summarize the aspects described above:

- a) today, production activities bring together process and organizational characteristics once ascribed to clearly distinct modes of production (i.e., mass production and artisanal production);
- b) the results of these activities (outputs) present a multitude of characteristics because of higher complexity of packages offered by companies, making difficult to group outputs into homogeneous classes based on a single intrinsic characteristic.

Building upon these two considerations, we propose a *definitive move beyond the use of “goods” and “services” as opposing categories and as a necessary starting point for any economic and business analysis*. From this point of view, distinguishing between goods and services appears strongly misleading as soon as the relevance of the diversity factors can emerge equally clearly and with economic and managerial implications between two given goods as between a good and a service.

As an example, just think to the degree of diversity that is evident between the production of telephone services and the production of ethylene (a service and a good). Such degree of diversity could be equally relevant for the production of ethylene and the production of shoes (two goods).

Our goal is, therefore, to answer the following question. Given that the separation of products into the categories of goods and services as a starting point for economic and managerial analyses of production is neither valid, necessary, nor even useful, what other sorting criteria can be adopted - or can merely be useful - in the analyses of industries, competition, and business management?

5. The product: redefining a concept

As noted above, the current evolutionary phase of productive capitalism poses major changes in the modes of production that bring us closer to realities that were once considered very different and very far away. Overcoming the separation of goods and services in production theory in favor of other approaches and criteria with which to properly analyze industry, competition, and strategic business management is now inevitable. We maintain that it is necessary to base this new approach on the identification of a *category* (concept), which, on the one hand, should be more general than “goods” and “services” as separate categories. On the other hand, this new category should constitute a solid base on which to represent

and appreciate the variety of specific productions that the evolution of productive capitalism has generated - and continues to generate.

The basic category we are proposing is the *product* - conceived, however, as the *output of a production process* of any technological nature¹⁰ that is first *demande*d and then *supplied*, or first *supplied* and then *demande*d, insofar as it can satisfy the needs of single economic agents of production and/or consumption. Consequently, in concrete terms, the product may appear as a good, as a service, or (much more likely) as something that incorporates attributes from both theoretical categories and hence is not uniquely definable using traditional terminology.

The choice of product as a “category” of economic science on which to base the analysis of heterogeneous forms of production - and of the relationships between them - also becomes appropriate because it allows us to use a body of well-known analytical and theoretical works provided by scholars and practitioners in different fields.

For example, the literature on manufacturing production, even that which focuses on tangible products (i.e., goods in the current parlance), has contributed many concepts that belong to the domain of “production theory” - that is, clearly beyond a narrow focus on specific aspects of technical and technological production. Since these concepts refer to an abstract category, they are ultimately applicable to “intangible products” (i.e., services), as well.

Likewise, marketing studies based on the concept of “satisfaction of needs” have adopted - implicitly or explicitly - a broad concept of product that is tied neither to the “*good*” nor to the “*service*” category. This statement is true particularly when we consider sociological, psychological, and other analyses, notwithstanding that the great majority of contributions in the field of marketing (generally economic and management-based) refer to goods (and especially goods intended for consumption) (Rispoli, 1992, p. 208).

In general, we can agree that in any production analysis based on an economic/managerial perspective, the reference point is usually a rather broad concept of product. This can be explained by observing that the *product* category inevitably synthesizes elements that, on the one hand, are doubtless connected and interdependent (e.g., inputs, characteristics of production processes, packaging, images, usage modes); on the other hand, they belong to different perspectives of analysis (scientific, technological, economic, social, financial, psychological, and so on).

By adopting an approach like the one we are developing in this paper, based on an abstract concept of product (i.e., economic category), we should be able to develop industry, competitive, and strategic management analyses more effectively. In this context, it appears necessary (as we will see in the next paragraph) to follow a trajectory that leads us from *the abstract product to concrete products* (items)¹¹ by identifying and using

¹⁰ We are referring to the broad concept of technology that is used by Facciopieri (1989) in strategic analysis. The concept is also used by Porter as a premise in the development of the “value chain” concept (1987, pp. 43-73)

¹¹ We clearly refer to specific products, particular to a company and the result of a knowledge set and a production organization that is unique and unrepeatable (see Di Bernardo e Rullani 1990, pp. 123-60).

specific taxonomies. Such taxonomies should allow the definition of ever narrower and consequently more homogeneous output sets, without adopting any separation between the different kinds of production that do not express economically relevant diversities. They should also be significantly connected to the intended objects and frameworks of analysis.

From a methodological point of view, the trajectory we are following - leading from abstract categories and concepts to specific, empirically-identified items, and vice versa - resembles the logic that is generally followed in developing theoretical, descriptive and normative frameworks at the core of many managerial-economic analyses.

The concept of *abstract product* that we are adopting as a starting point to move toward *concrete products* must have dual properties and meanings:

- 1) product as a “medium”;
 - 2) product as a “shell”.
- 1) The concept of product must be a medium that allows us both to link (interaction effect) and to distinguish (separation effect) two or more economic agents. The simplest case involves one producer and one user, whether an intermediate or a final user (i.e. a company or a consumer).
The first aspect - *product as a medium of interaction* - is relevant for discussing the division of labor between actors along the entire value chain. The second aspect - *product as a medium of separation* - allows us to delimit, for descriptive purposes, the production activities of single organizations (businesses and enterprises) and of single individuals (labor) on the one hand, and the usage activities of, again, organizations (along the supply chain) and single individuals/households (for their consumption activities) on the other.
 - 2) The concept of product should also be an effective “shell” for those characteristics (descriptive variables) that - even if belonging to different perspectives and categories of analysis - are necessary to identify and describe specific, concrete products (items) and to discuss the specific technical and economic issues on which the analysis is focused.

In the previous pages, we argued that within the term “product” we encompass the results of any production process (outputs), by means of any technology, that are demanded and thereby supplied or supplied and thereby demanded to satisfy the needs of single economic agents of production and/or consumption. However, such a definition might wrongly suggest, for the purposes of our analysis, that the results of any production activity, performed anywhere or by anyone, has to be included in the same category. This category would include both the activities performed by production organizations (profit and non-profit, or, in any case, any organization that produces to transfer the results of their activities to other economies) and those self-production activities that any subject-person, as an economic agent of consumption, can put in place in order to satisfy personal needs. Instead, the outputs of the production activities represented in our concept of “product” must form a category that, while still broad, nevertheless constitutes a subset of the broader category described above. It must include the outputs of all those activities that we consider relevant for the production economy in general as well as for its component parts. In a nutshell, *we define as products only those outputs that are realized for*

the purposes of being transferred (in any form) from a producer to other economic agents (whether of production or consumption), that is, outputs that will be the object of transaction¹².

It thus becomes clear how such a definition of product, in all of its generality, leads to a category that is inevitably abstract, but this is in fact what is necessary to proceed in our frame of analysis. It is therefore a concept - very different from concrete items exchanged in the real world - that has to be considered on the same logical level as many other theoretical categories of production economics, such as company, consumer, entry barrier, cost, capital, and so on. Conceived in this way, the "product" immediately evokes neither material goods nor manufactures, nor services. Rather, as previously noted, it evokes the generic outcome of a production process (output) intended for transfer/exchange. This way of conceiving a product incorporates the first of the two meanings emphasized in the previous paragraph: *the presence of a "good" (material) is not necessary to connect or distinguish a supplier from a consumer; instead, regardless of its nature, an output that is exchanged is sufficient*. Consider, for example, a collaboration agreement between companies concerning the transfer of know-how: this transfer might assume various forms, such as "lending" technical personnel, software stored on a device, a project with its related manuals, and so forth. There is surely a change in the "technical" form of the exchange - the description of which has to do with the second significance noted above (multidimensionality); however, the essence does not change: it nevertheless remains a transfer of a product (in this case, know-how).

In order to employ this concept as a platform for the analysis of real-world production, it is necessary to adopt a multidimensional approach that allows us to operationalize our second meaning. Recall that the second meaning posits that the abstract product must contain certain attributes and characteristics that, from time to time, are used with respect to first, the degree of generality and type of analysis one intends (i.e., industrial, competitive, distributional, organizational), and second, to the different, specific connotations assumed by products realized in different ways and situations, which is important to observe, again, across different analytical levels (see the "technical" form in the previous example).

6. A different way to approach product analysis

This reflection is not strictly aimed at considering concrete products - single items. Rather, it focuses on the approach required to appreciate and meaningfully analyze economic production phenomena. Such a process forces us to develop groupings and distinctions according to several different perspectives depending on the goals of the analysis, keeping in

¹² We refer to the concept of transaction, understood as the way by which the actors of the economic-production system relate to each other, with the aim of overcoming resource scarcity (characterizing the environment in which they operate) and of realizing in this way the transfer of goods and services (see Commons, 1934; Coase, 1937, Williamson 1975, 1986).

mind that “obscuring the specificity of analysis and of argumentation does not lead to generality, but rather to vagueness” (Volpato, 1989 b. XXVI).

Maurizio Rispoli
Michele Tamma
Goods and services,
that is, products

Studies developed in different areas of research that, over time, have considered products (e.g., production, marketing, the sociology of consumption, consumer psychology, industrial economics) reveal continuous attempts to identify less and less abstract product categories and have referred instead to significant subsets of that single, all-embracing category of the product concept we proposed in the preceding pages. Beginning with specific aspects of their actual products, they look for broader categories by which to classify them in order to compare with their competitors' products on the one hand and with the needs of different segments of the market on the other.

We must also observe that these attempts, especially those aimed at market and industry analyses, have almost always implicitly assumed the validity of the *product=good* equation, in the sense that the product to which they refer is characterized by an essential materiality. Adopting different taxonomic criteria, these contributions have made us familiar with several different and opposing categories of products-goods: consumer goods and producer goods; durable and nondurable goods. Consumer goods were further divided a long time ago (Copeland 1923) into “convenience”, “shopping”, and “specialty” goods, in relation to the purchasing effort on the part of the consumer. They were also distinguished as goods for immediate consumption, semi durable and durable consumption, clearly using alternative criteria. Producer goods were instead classified into equipment (plants, machines, tools); basic raw materials; industrial supplies; semi-finished products; and component parts.

Rather than continuing with further classifications, we need to ask ourselves: what do these product categories represent? Are they still abstract products or homogeneous groups of actual, real products?

It appears to us that we are still operating at a level of significant abstraction, even if less abstract in relation to the concept of product that we proposed, in that the classifications adopted and noted above lead to putting actual products that are objectively different into the same category.

Actually, it is only through a process of specification that refines the description by adding a series of characteristics from different areas of analysis (e.g., engineering, process, distributive, communicational, usage and so on) that we can finally identify an actual product - that is, the one labeled with the term ‘item’ (for example, a “two-speed, percussion and rotation action drill for *bricoleurs*, obtained through mass production, with a power of 300W that allows for the use of multiple accessories, from the XYZ brand, available at the largest retailers and at specialty shops”).

It becomes clear that it will never be possible to distinguish between and analyze items using a single feature or a single, commodity-related characteristic. Nor can the lack of this latter, commodity-related characteristic (to which scholars generally refer as immateriality) be a discriminating element, sufficient alone to develop a product theory. Rather, it simply represents a characteristic among others that must be considered within a *multidimensional* approach.

In our opinion, this is the way to study all products, and therefore also those that are traditionally called services. For these, attempts at classification have followed a particular developmental arc: the term product - and the complex concept it represents - has rarely been employed. In this context, we recall the following criteria of distinction between services¹³: degree of materiality (immateriality); degree of interaction between producer and consumer; degree of customization; importance of the human factor; manner and location of service delivery; exportability; degree of innovation¹⁴.

On the other hand, it is worth pointing out that the reconciliation - both factual and theoretical - that we have noted between goods and services, also cited by those who have analyzed the evolution of the industrial and tertiary sectors - has introduced several analogies in the use of taxonomic criteria. This has led, for example, to the distinction between consumer services and producer services, between services to individuals and business services, between innovative services and traditional services, and between automated and unautomated services.

In proposing a new, multidimensional approach, we are following an idea that is not entirely new, even if it matured in different disciplinary contexts and in different research environments. See, as one example of many, the approach of Lancaster (1979), which considers the product as a set of characteristics.

In addition, as we have repeatedly noted, a wide set of characteristics from different analytical perspectives (industry-based, marketing, operations, logistics, etc.) is generally used when moving from abstract to actual products. These sets are related to the application of different theoretical frameworks that express distinct purposes of analysis.

If we therefore deepen the study of products by adopting a particular analytical perspective, the selection of characteristic combinations allows us to group the enormous variety of production outputs into product families. Products included in these families are still abstract, but they are also suitably recognizable and thus sufficient to analyze, understand, and explain most of the products' common features within each family.

In this way, even in the study of products, the following dichotomies can be overcome:

- a) the peculiarity of the single case: when carried to its logical extreme, it allows for a precise definition of an actual product (item), with all of

¹³ For a review of efforts at service classifications developed in the past, see the summary by Lovelock (1983).

¹⁴ With respect to this characteristic, (...) it makes no sense, in our opinion, to set boundaries and distinctions between advanced services (i.e., advanced tertiary, as they are often called) and other services. Instead, it is enough to reflect on the fact that, on the one hand, such characteristics might not refer to services only but any type of output, and therefore also goods. On the other hand, any type of output can assume a more or less "advanced" characteristic, from a technological point of view (i.e., regarding production techniques, the way output is exchanged, the way the output is used; in terms of the innovation capabilities of single companies or individual consumers) (Rispoli, 1991, p. 16)

its specific characteristics, yet it prevents any kind of generalization, and therefore comparison, in economic analysis;

- b) the vagueness of generic results that, as any researcher knows, prevents any kind of effective comparison¹⁵.

The proposed goal of our work is to definitively move beyond the use of the “goods and services” dichotomy as a necessary starting point for establishing and undertaking business, economic, and industrial analyses. It must be noted that the characteristics of products most frequently cited in analytic frameworks used in such analyses can combine “old” goods and “new” services in the same sets.

The following characteristics (an indicative list that, in our opinion, is significant but not exhaustive) come from both the most recent studies that focus on the world of services and the results of traditional analyses that have accumulated over time regarding the world of goods. The clear and somehow predictable prevalence of the latter has to be noted:

- intended use/purpose,
- purchasing effort,
- combination of use (with other products),
- fashion,
- status symbol,
- seasonality,
- type of asset (current, non-current),
- frequency of purchase,
- customization,
- transportability,
- storability,
- package,
- information content,
- reproducibility/replicability,
- production conjunction,
- automation (of self service distribution),
- diffusion,
- image,
- financial contribution,
- economic contribution,
- public interest,
- usage functions (class of characters),
- commodity-related aspects (class of characters)¹⁶.

We checked for the presence of both goods and services in product categories that can be obtained using one or more of the characteristics listed above, but we did not include our findings in these pages insofar as they might have appeared redundant, if not pedantic. It is much more

¹⁵ “It is a matter of recomposing the separation between inductive and deductive methods, trying simultaneously to differentiate normative general and abstract knowledge to ensure its greater adherence to historically-determined situations and to interrupt the vicious cycle of single-case analysis and to move toward more general logical categories (Rispoli, 1991, p. 298).

¹⁶ “Commodity-related characteristics” and “usage functions” are differentiated from previous categories insofar as they themselves constitute classes of n. characteristics.

relevant, in our opinion, to underscore that the listed characteristics can be used in implementing specific analyses for any kind of product (goods or services, tangible or intangible outputs). Obviously, different goals, analytic perspectives (e.g., occupational, organizational, distributive, productive-operational, strategic, etc.) and concrete contexts must be taken into consideration (studying, for example, the problems of an entire industrial sector rather than a single district, a company rather than a single line of production). Therefore, the sets of characteristics and of concepts through which products are identified and described in interpretive frameworks will be different and specific in each case.

7. Summary and conclusion

At the beginning of this article we introduced a hypothesis concerning the non-necessity of separating goods and services as a necessary starting point for any economic analysis.

Historically, this separation has strongly influenced both practice and theoretical analyses. Our hypothesis appears to be corroborated by the argumentation presented in our work.

From the profound changes that have occurred in the last twenty years in the world of production, which have put into question many descriptive-interpretive and normative perspectives, some factual evidence has emerged:

- a) today, there are products - both goods and services in the general sense - that are obtained through traditionally industrial production methods, even if those methods are made innovative through technology. Other products - again, both goods and services - are instead obtained through processes that can be generally associated with artisanal production.
- b) there has never been a serious effort to equate services to goods in terms of confronting the problem of precisely defining and describing the outcome of production in the case of services (as was common for goods). The problem was instead “resolved” a bit hurriedly by introducing the concept of non-materiality, which, in all its vagueness and ambiguity, seemed to exhibit the traits of a “non-characteristic”;
- c) the actual reconciliation between goods and services noted above corresponds to a more recent theoretical reconciliation, of which the diffusion of the concept of the “goods-services continuum” is emblematic.

On the basis of such considerations, we have developed a proposal and a hypothesis concerning several fundamental concepts that can be summarized as follows:

- a) *it is necessary to adopt a logical category that, on the one hand, is more general than “goods” and “services”. On the other hand, this category must become a solid basis on which to develop an identification, description, and interpretation of the variety of production results.* For us, this logical category is the product, understood as the output of any production process regardless of its technological nature, an output that is demanded and supplied, or supplied and then demanded

(i.e., exchanged) because of its ability to satisfy the needs expressed by single economic agents of production and/or consumption. The concept we adopt is configured as an abstract product (category of economic science) that, in order to be employed in the analysis of economic and productive phenomena, must have a double meaning: 1) to be a medium of interaction and, at the same time, of separation; 2) to be a “shell”;

- b) *the product as a medium allows us to connect (interaction effect) and, at the same time, to distinguish (separation effect) two or more economic agents in the analysis of production and consumption processes;*
- c) *the product as a “shell” opens the way to a trajectory that allows us to move from the abstract product towards concrete products by adopting a multidimensional approach - that is, by identifying specific sets of attributes and characteristics (descriptive variables) that, even if belonging to diverse analytic perspectives and categories, must be used to combine specific concrete products (single items).*

In conclusion, with respect to the propositions recalled above and the methodological proposals we have posited, it appears completely acceptable to us to *abandon any initial distinction between “goods” and “services” as a necessary precondition of any kind of economic-managerial analysis; and to adopt instead the concept of product as a medium (of interaction and distinction) to move toward applying a multidimensional approach*, as much more effective in our opinion.

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Book reviews

Giandomenico Scarpelli, **La ricchezza delle emozioni. Economia e finanza nei capolavori della letteratura**, Carocci editore, Roma 2015, pp. 311.

Book reviews

Non mancano, a disposizione di chi ne è interessato, i saggi accademici, gli atti dei convegni, le monografie settoriali, gli articoli giornalistici su riviste specializzate, che da vari punti di vista hanno messo in evidenza i rapporti tra l'economia ed alcune importanti opere letterarie. Si tratta quasi sempre di contributi non facilmente accessibili, data la loro complessità, e che in lingua italiana, a dire il vero, non sono numerosi. Piuttosto ricca invece la disponibilità bibliografica in lingua inglese circa il rapporto economia e letteratura ed in tal senso Giandomenico Scarpelli, che è un importante dirigente della Banca d'Italia, segnala nella prefazione del suo libro un volume sui legami e le reciproche influenze tra economia e letteratura che porta il titolo *The Literary Book of Economics* (2003) e che è stato scritto dall'economista statunitense Michael Watts.

Non ancora tradotto in italiano questo volume è una antologia di opere letterarie per lo più anglosassoni corredate di succinte introduzioni sul significato economico dei brani riportati, che possono avere suggerito a Scarpelli qualche elemento utile nella messa a punto non solo strutturale del suo lavoro. Sempre nella prefazione troviamo indicato il volume di Leonardo Martinelli, un giornalista italiano esperto di questioni economiche, che ha pubblicato nel 2014 una antologia con un titolo significativo: *Quasi un romanzo. L'economia raccontata a chi non la capisce*.

Allestendo note appropriate con una puntualità esplicativa quasi didascalica e rivolgendosi ai lettori destinatari del volume, Martinelli ha commentato recenti opere di narrativa non solo italiana e alcuni film celebri per presentare e spiegare, nella maniera più semplice possibile, molte tematiche basilari concernenti l'economia e la finanza della nostra epoca più recente. Tramite particolari richiami letterari e cinematografici questa antologia ha messo a disposizione di un largo pubblico ogni spiegazione utile, nell'ambito terminologico, affinché a tutti possa arrivare chiaro, fino in fondo, il significato di certe parole-chiave attualizzate dai recenti studi e dalla informazione mediatica circa l'economia e la finanza.

Scrivo ad esempio Martinelli che fino a poco tempo fa la parola *spread* era sconosciuta al pubblico: «un termine inglese all'apparenza innocuo, che in realtà era il termometro del peggio, il riflesso della tenuta delle finanze pubbliche e dello Stato in generale e da cui dipendeva molto altro, compresa la capacità delle imprese di strappare crediti alle banche e ai cittadini di sottoscrivere un mutuo». Senza dubbio Scarpelli ha compilato la sua antologia tenendo ben presente quella realizzata da Martinelli, ma si è imposto come irrinunciabile uno scopo diverso rispetto a quello raggiunto da Martinelli che lo aveva preceduto, perché egli ha escluso totalmente dalla sua antologia qualsiasi testimonianza relativa al mondo del cinema.

Impegnativo è stato l'allestimento della antologia di Scarpelli, in quanto il ricchissimo patrimonio letterario da lui analizzato, edito in un periodo storico ampio ma circoscritto, (dall'inizio del Settecento alla metà del Novecento) riguarda opere quasi tutte celebri e rappresentative non solo del patrimonio letterario italiano, ma anche di quello di nazioni importanti come la Francia, l'Inghilterra, la Russia e gli Stati Uniti. Scarpelli ha dimostrato costantemente di conoscere bene, anche nei particolari, le biografie e le opere degli autori compresi nel suo volume, perché è riuscito a trovare, persino in opere letterarie di grande qualità artistica ma poco conosciute o comunque trascurate dal grande pubblico, brani evocativi in qualche modo pertinenti ai molteplici aspetti che, nel corso degli ultimi tre secoli della nostra storia, hanno caratterizzato nelle singole nazioni, cui si è fatto cenno, lo sviluppo della scienza economica.

L'antologia è divisa in dodici sezioni e ciascuna di esse raccoglie le pagine, a volte molto ridotte, di autori diversi concernenti una tematica unica e specifica a cominciare dalla prima sezione che fa riferimento alla tematica delle leggi e del metodo della Scienza economica e poi si passa, nelle sezioni successive, al valore delle merci, alla forma di mercato e alla determinazione dei prezzi. Sempre procedendo per schemi molto ridotti segnaliamo la sezione in cui si tratta del lavoro, della produzione e del progresso tecnico. Non vengono trascurate neppure le tematiche concernenti la determinazione dei salari e la distribuzione delle ricchezze e del reddito. Come pure non vengono trascurate le tematiche riferibili al liberismo e al protezionismo, alla moneta, al risparmio, alla speculazione e alle imposte.

Con la sezione finale vengono presentate pagine letterarie quanto mai attuali sulla economia e l'ambiente. È ora di chiederci perché Scarpelli abbia ritenuto utile fornire ad un largo pubblico questa sua antologia ed è stato lui stesso a rispondere a tale interrogativo con questa pagina che riportiamo integralmente:

«Mi auguro che questo libro possa interessare e a tratti divertire sia i lettori che -appassionati dei capolavori della narrativa- sanno poco o nulla di economia, sia gli economisti e tutti coloro che hanno un po' di preparazione in questo campo per studi o inclinazioni personali. I primi dovrebbero trovare chiarimenti sul senso di alcuni passaggi dei romanzi e dei racconti che amano, e dovrebbero quindi apprezzarne alcune sfumature forse non colte appieno in precedenza. I secondi -cioè coloro che conoscono più l'economia che la letteratura- saranno incuriositi e forse sorpresi scoprendo cosa i grandi narratori hanno scritto sul valore, sulla determinazione dei prezzi, sulla speculazione, sulla crisi ecc. (e spero che siano benevoli con l'autore per qualche inevitabile semplificazione nelle spiegazioni di complesse questioni economiche)». Per quanto si può intuire da questo brano tratto dal libro di Scarpelli, egli non solo ha corredato, con un indispensabile commento, i testi presenti nella sua antologia, ma ha anche fatto sì che essi siano il risultato di una severa selezione rispetto ad altri testi letterari sempre riferibili a temi economici perché, anche dal punto di vista artistico, i testi definitivamente selezionati, meglio di altri, sono connotati dalla «sfera emozionale ed etica che è essenziale nei

capolavori letterari», i soli che hanno il potere di coinvolgere del tutto la stessa disponibilità emotiva dei lettori.

Ciò è importante perché, da alcuni decenni a questa parte, la scienza economica ha assunto, in molti casi, vesti troppo formalizzate, come è stato detto da parecchi studiosi e pertanto resta illuminante la riflessione di Fabrizio Galimberti, uno studioso secondo il quale è legittimo dare impulso ad un nuovo orientamento della scienza economica che la aiuti a virare «verso la psicologia, la storia, la sociologia, come si conviene a quella che dopo tutto è un misto fra scienza esatta e scienza dell'uomo». Per concludere possiamo dire che anche Scarpelli, con l'aiuto della letteratura, ha dimostrato di condividere questa prospettiva di innovazione.

Umberto Casari



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Francesco Piro, **Manuale di educazione al pensiero critico. Comprendere e argomentare**, prefazione di Tullio De Mauro, Napoli, 2015, Editoriale Scientifica - Collana punto org., pp. 280.

“Il nostro impegno consiste nel portare la scuola del Novecento in questo secolo. Ciò significa saper innovare contenuti e metodi senza stravolgere un modello educativo che funziona e che ha prodotto eccellenze nei secoli, da Galileo a Fabiola Gianotti. Perciò non intendiamo sostituire il modello *knowledge-based* su cui si fonda la scuola italiana con il modello *skill-based* più tipico del mondo anglosassone. Il nostro obiettivo è di sviluppare nuove competenze e nuove abilità pratiche, sulla base di una solida conoscenza teorica”.

Così afferma il Ministro Stefania Giannini in una intervista di Armando Massarenti pubblicata il 22 febbraio 2015 su “Il Sole 24 ore”.

Con tatto e al tempo stesso con ferma decisione, Giannini pone una questione di fondo per lo sviluppo economico e culturale del nostro Sistema-Paese: se è vero che l'educazione scolastica (e universitaria) in Italia è basata sulla trasmissione di conoscenze, è altresì fondamentale riconoscere come questa *non basta più*, da sola, per formare le risorse umane oggi necessarie a sostenere nel lungo periodo la competitività delle aziende e, più in generale, di tutte quelle organizzazioni (Istituzioni, Terzo settore etc.), dove prendono corpo i processi di creazione di valore. Ciò che urge sempre di più, in un mercato del lavoro dove la flessibilità è metodo, è un personale dotato di *competenze trasversali*, ovvero di competenze che hanno una base *metacognitiva*, più che cognitiva.

Enumeriamone alcune:

- il *problem solving*, cioè la capacità di analizzare un problema scomponendolo in segmenti, elaborando quindi nuove sintesi funzionali alla soluzione;
- l'*innovatività*, ovvero la capacità di esplorare nuove soluzioni, diverse da quelle abituali;
- la *capacità di raccogliere dati ulteriori*, ovvero di impostare una ricerca;
- la capacità di *stendere relazioni* in forma scritta o orale, individuando i profili essenziali della questione in discussione;
- la capacità di distinguere le posizioni e *negoziare* una efficace sintesi tra le varie prospettive.

È qui che nascono le domande di fondo che animano il Manuale di Francesco Piro presentato da Tullio De Mauro, tra i padri nobili della linguistica italiana:

- la nostra didattica lungo l'intera filiera dei processi di formazione delle future generazioni di cittadini e di professionisti è in grado di facilitare l'acquisizione di tali competenze?

- E, se non lo è, come riformarla per renderla adatta a tali scopi?
- Infine, come farlo integrando piuttosto che sopprimendo il modello *knowledge-based*, come suggerisce, saggiamente, il Ministro?

Il *Manuale di educazione al pensiero critico* di Francesco Piro è un libro che prende di petto questi dilemmi. Lo fa senza indugi e segnando, con decisione e per primo nel panorama attuale, una via propriamente italiana all'ampio dibattito che ruota intorno al termine anglosassone *critical*: un lemma che giunge a noi dalla tradizione del mondo antico. Crisi (*crisis*, κρίσις) dal greco *crino* (κρίνω) vuol dire separare. Quindi discernere, giudicare, valutare. Avere criterio (*criterion*, κριτήριον) è un modo di evocare il buon senso. Anche il senso comune, quello che va in automatico, comunque precede, anche di poco, l'azione. Termine che interessa molte aree nell'ambito delle Scienze Umane e Sociali e che, nel contesto degli studi organizzativi ed economico manageriali, è tematizzato nella letteratura nota come Critical Management Studies (CMS).

Tanto premesso, chiariamo dunque cosa s'intende per "pensiero critico" nella proposta del Manuale di Piro e perché quella impostazione può risultare strategica per gli studi di management.

Il *critical thinking* è da decenni una disciplina insegnata nei *college* anglo-americani, all'interno dei quali esso è concepito come una disciplina che fornisce conoscenze generali mutuata dalla logica, dalla metodologia delle scienze, dalla psicologia cognitiva, allo scopo di rendere gli studenti più attenti nell'approvare o respingere argomentazioni, più capaci di intervenire costruttivamente in discussioni e dibattiti, più abili nello scovare fallacie e trucchi retorici nella discussione pubblica.

In altri termini, il *critical thinking* svolge, in un'ottica *skill-based*, alcune delle funzioni che in contesti scolastici e universitari si attribuiscono - in un'ottica tutta *knowledge-based* - all'insegnamento della filosofia.

Da diversi anni si discute se introdurre tale disciplina all'interno del percorso scolastico italiano, magari come un settore di quella che viene chiamata tradizionalmente l' "educazione civica", come propone la Senatrice a vita e ricercatrice di area scientifica (quella delle cosiddette "scienze dure") Elena Cattaneo sempre su "Il sole 24 ore" del 30 novembre 2014.

Piro ci offre il primo manuale italiano di questa costituenda disciplina - l' "educazione al pensiero critico" come egli propone di chiamarla - suggerendone diverse possibili allocazioni didattiche:

- nel liceo, essa potrebbe restare una componente dell'insegnamento della filosofia ripensato in funzione della lettura e discussione dei testi piuttosto che dell'esposizione di grandi "sistemi";
- negli istituti tecnico-professionali, nei quali la filosofia non è presente, essa andrebbe invece a costituire una disciplina indipendente;
- nell'università, essa può diventare un corso di base che faciliti la transizione dallo studio liceale (com'è attualmente) allo studio universitario e ciò non soltanto nel caso di studenti dei corsi strettamente "umanistici", ma anche, a più ampio spettro, nei corsi di tutta la classe delle Scienze Sociali, a partire proprio dai corsi di Economia.

Inserimento che potrebbe sembrare curioso e proprio per questo torneremo in conclusione sull'utilità di questo approccio (e di questo testo) come "compagno di strada" per la formazione degli economisti, dei manager e dei professionisti d'impresa del futuro.

Una prima domanda, intanto, si impone. Ha senso organizzare

manualisticamente un percorso volto a facilitare lo sviluppo delle capacità critiche? Sì, risponde Piro, perché alcune conoscenze sulla natura del linguaggio e del ragionamento sono indispensabili per saper valutare argomentazioni e percorsi cognitivi sia nostri che altrui. In ciò, il *Manuale* sfida la saggezza popolare ricapitolata dalle domande che - provocatoriamente - Tullio De Mauro pone all'autore nella sua prefazione al testo:

“Conoscere il principio di Archimede insegna a nuotare? Sapere tutto dei fotoni migliora la vista?”

Ovviamente, no. Ma, per saper ben ragionare, bisogna invece apprendere a *riflettere* su ciò che si afferma e sulle basi che abbiamo per affermarlo, cioè apprendere ad usare *responsabilmente* il linguaggio, come spiega lo stesso De Mauro nel prosieguo della sua prefazione. Come si potrebbe farlo senza *sapere* su quali basi distinguiamo un'argomentazione logicamente coerente da una che non lo è? Come molti altri studiosi, Piro condivide la tesi che la *Logica* - sia pure suddivisa in logica “formale” o matematica e logica “informale” o del dialogo - vada *insegnata*.

Nondimeno, un corso di educazione al pensiero critico non può semplicemente darci delle nozioni di logica e di teoria dell'argomentazione. Esso deve insegnarci a farne *uso*. Per questo motivo, il *Manuale* di Piro ci offre un percorso in cui si alternano almeno tre registri:

- il dialogo;
- la spiegazione semplice e didatticamente guidata;
- gli esercizi e giochi per gli studenti.

Il *dialogo*. All'inizio del libro, due personaggi - chiamati Colto e Inclita, per richiamare il proverbiale “parlare al colto e all'inclita” - affrontano a modo loro il tema da cui siamo partiti: Inclita è stata una brillante studentessa liceale, ma è andata maluccio al test di accesso all'Università, perché non è stata in grado di rispondere alle domande di logica e di comprensione dei testi. Colto le spiega che ciò dipende da un'educazione scolastica lacunosa e le propone una serie di “unità didattiche” che la aiutino a rimediare. A partire di qui, il discorso diviene appunto “manualistico”, perché Colto propone nove unità didattiche che delineano il modello del *critical thinking* all'italiana secondo Piro: si analizzano via via la struttura degli enunciati, il ragionamento in generale, il calcolo proposizionale, la logica predicativa o categorica (ovvero i sillogismi aristotelici, con la loro rappresentazione insiemistica), la logica delle relazioni, la logica modale e la nozione di probabilità, l'analisi delle fallacie, il dialogo e le sue regole, la struttura del testo argomentativo.

La *spiegazione semplice e didatticamente guidata*. Il dialogo tra Colto e Inclita prosegue, intervallando le unità didattiche: Inclita espone i suoi dubbi sui contenuti delle unità didattiche, costringendo Colto a spiegarsi meglio. A sua volta Colto propone degli esercizi per mettere alla prova le conoscenze apprese.

Il ricorso al dialogo è dunque esso stesso anche un artificio didattico, per fornire a un lettore insegnante spunti per sviluppare la discussione e esaminare problemi più complessi. È però anche un modo per rendere meno “dogmatico”, come scrive l'autore, il percorso manualistico.

Gli *esercizi e giochi per gli studenti*. È il terzo perno del percorso: ogni unità didattica è seguita da esercizi specifici, alcuni dei quali *applicano*

le regole insegnate, ma altri sfidano lo studente ad andare avanti, come avviene negli “esercizi a piacere per i volenterosi”, a chiusura di ciascun capitolo: immaginare una prosa ad alta densità metaforica in cui l'enunciato assurdo “mia nonna è una sinfonia” acquisisca un senso (p. 43); costruire un'argomentazione che difenda una determinata scelta servendosi degli schemi della “nuova retorica” di Perelman (p. 199); prendere posizione a ragion veduta sugli insegnamenti di un esperimento psicologico (pp. 222-3).

Come sviluppo ulteriore di questo apprendistato al *problem solving*, il libro propone nove giochi conclusivi, non privi di *humour*: hai comprato un robot che ha una conoscenza limitata della sintassi della lingua italiana e stabilisci come puoi dargli degli ordini complicati; hai davanti a te un brano al quale sono state sottratte le congiunzioni “dunque, infatti, inoltre, tuttavia” e metti quella giusta dove è opportuno; devi confrontarti con un “bastian contrario” che contesta tutte le tue argomentazioni, rafforzale in modo da renderle logicamente inattaccabili; decifra un messaggio cifrato ma dal contenuto rigorosamente logico; analizza lo sviluppo di un dialogo, riconoscendo come mutino via via gli obiettivi dei dialoganti; valuta gli argomenti dei politici intervenuti a una “Ballarò” immaginaria..... Seguono istruzioni su come rendere più complessi i giochi proposti, generando dei giochi di gruppo per una classe.

Il *Manuale* di Piro offre dunque molti stimoli e novità. Ovviamente, esso non offre tutto e fa, anzi, delle scelte di campo molto precise. Della logica contemporanea vengono proposti solo gli elementi fondamentali, non gli sviluppi, ma questa è una scelta obbligata per un corso di *critical thinking*. Più contestabile è il fatto che il punto di arrivo di tutto il percorso sia l'analisi del testo argomentativo, analisi intesa, per dirla ancora con De Mauro come un “salire in vetta dell'ascesa della comprensione, là dove si annidano le difficoltà ultime e supreme” (p. 10).

È come se il *Manuale* ci proponesse un percorso circolare, partendo dalla comprensione dei testi e tornandovi alla fine da un punto di vista sinottico e “critico”. Non era l'unica via possibile. Sarebbe stato, per esempio, possibile fare della metodologia delle scienze empiriche, per certi versi le più care ai nostri approcci economico aziendali, il punto conclusivo del percorso, dando uno sviluppo più organico alle parti che il testo dedica al ragionamento induttivo e abduttivo, al calcolo delle probabilità, alle regole e alle fallacie del ragionamento causale.

La scelta dipende, evidentemente, dalla formazione dell'autore, professore ordinario di Storia della filosofia all'Università degli Studi di Salerno, nonché dalla genesi del libro, nato da lezioni tenute alle matricole di Scienze dell'Educazione, corso classicamente “umanistico”.

Tuttavia, la scelta di un percorso circuitario tra comprensione e argomentazione ha senz'altro anche una sua plausibilità teorica. Se la base della capacità di fare *buoni* ragionamenti è la capacità di rappresentarsi obiezioni - come Piro sottolinea più volte -, è chiaro che la capacità di risolvere problemi in proprio e quella di capire le ragioni degli altri sono collegate tra loro.

Inoltre, e più praticamente, lo studente delle discipline scientifiche e di scienze economiche e sociali ha presumibilmente *altre* occasioni per

apprendere la metodologia della ricerca empirica, ma ne ha senz'altro *poche* per riflettere sulle regole e i fini della discussione e del confronto tra le idee.

E, da questo punto di vista, questo *Manuale* fornisce effettivamente il prototipo di un corso di base che risulterebbe utile in tutti quei corsi di studio dove la formazione punta a profili competitivi nelle pratiche di lavoro aziendale. È questo, agli albori del terzo millennio il principale “ruolo sociale della conoscenza” (pp. 11-15), evolutosi non solo nella direzione di un'ulteriore specializzazione di tipo scientifico, ma anche nei modi di integrare le conoscenze specialistiche con le competenze che tradizionalmente vengono facilitate dalle *humanities*. E, in questo senso, compiti sempre più interni alle funzioni del *management* diventano quelli legati alla capacità di orientare il flusso delle informazioni, organizzare la comunicazione, creare conoscenza condivisa, instaurare tavoli negoziali e rendere comprensibili i punti di divergenza: condizioni necessarie a stabilire *come* orientare efficientemente le decisioni.

Questo libro è il figlio naturale di una precedente esperienza di ricerca maturata in seno a puntOorg (www.puntoorg.net), confluita in un'antologia di scritti di ricercatori di ampio respiro internazionale (*Leggere e scrivere organizzazioni. Estetica, umanesimo e conoscenze manageriali* a cura di Luigi Maria Sicca, Napoli, Editoriale Scientifica, 2010) interamente dedicata alle relazioni tra *humanities* e saperi manageriali. Il contributo di Piro a quel lavoro si interrogava, già allora, su come creare una cassetta degli attrezzi di conoscenze propriamente umanistiche spendibili in campo organizzativo e manageriale. E il *Manuale di educazione al pensiero critico* che oggi si presenta è, evidentemente, una prima risposta a quella domanda che pure richiede ancora molto impegno in un dibattito ancora tutto aperto.

Esso muove da una base comune a tutte le discipline - la logica -, ma si sofferma poi in particolare sulle regole e finalità del dialogo e del confronto tra le idee, proprio perché tali conoscenze *non possono essere più* un appannaggio dei soli umanisti, ma debbono diventare una parte dell'identità del buon “cittadino del mondo globale” ostile agli integralismi e ai pregiudizi; nonché uno strumento per sviluppare capacità di approfondimento e di riflessione nei “nativi digitali”, sottraendoli allo stordimento da inflazione dell'informazione: e, si può aggiungere, anche uno stimolo teorico per quanti abbiano o dovranno abitare, a diverso titolo, le organizzazioni aziendali dove il capitale umano va diversamente integrato, di tempo in tempo, alle risorse tecnologiche, anch'esse in continua evoluzione.

Vale dunque la pena di confrontarsi con la proposta di Piro. Complice la buona compagnia del vecchio Colto e della giovane Inclita che semplificano e risolvono, rendendo gradevole una lettura certo densa, accompagnata dalla metanarrazione affidata al gesto grafico di un artista del calibro del M° Luca Carnevale, lungo un percorso efficace e ironico articolato in nove tavole, una in apertura di ciascun capitolo.

Luigi Maria Sicca, Cristina Mele



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Sinergie Italian Journal of Management

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Mission

- To build a bridge between business and society, and to bring the Italian management perspective to the international debate on business enterprise and its role in society.

Values

- Rigor in selecting the studies and papers submitted to the Journal.
- Innovation in research pathways and in service to readers.
- Consideration of 'voices' from the scientific community.
- Openness to all researchers-particularly young researchers.
- Internationalisation of relations with foreign researchers and journals edited in foreign countries.
- Simplicity, in the sense of valuing carefully crafted results and paying attention to interpersonal relationships.
- Respect for the thoughts of authors, staff and the audience.

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- Connections between research, thought and managerial action are the foundation premises on which to build a future based on the common good.

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- acceptance subject to substantial modifications
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Books

GOLINELLI G.M., (2010), *Viable systems approach (VSA). Governing Business Dynamics*, Cedam, Wolters Kluwer, Padova.

Articles

BACCARANI C., GOLINELLI G.M., (2008), “The entrepreneur and the frontiers of complexity”, *Sinergie*, n. 75, pp. V-X.

Book chapters

VARALDO R., (1987), “The internationalization of small and medium-sized italian manufacturing firms”, in Rosson P., Reid S., (edited by), *Managing export entry and expansion: concepts and practice*, Praeger, New York.

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