

# INNOVATIVE FORMS OF MARKETING INTEGRATION IN LOCAL NETWORKS\*

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## ABSTRACT

Marketing cooperation (i.e. trade fairs organization, export consortia) has been regarded as a factor of success for local systems composed of small and medium-sized businesses. Furthermore, the cooperative dimension has been considered relevant for the development and maintenance of manufacturing capacity in the various local areas (i.e. industrial districts). Traditional forms of marketing cooperation among the players of a local network are currently facing a challenge from the type of competition that characterizes the present-day international scene, which is increasingly evolving towards buyer-driven and geographically diversified networks. Such a situation stands in contrast to the more traditional systems of marketing and coping with competition. In this context, new forms of marketing cooperation emerge in the local network of fashion firms, and include the integration of cooperative retail strategies (i.e. store openings) and branding (i.e. brand management). These new forms seem to be characterized by a more complex level of integration of marketing processes and refer to an “aggregation” of actors created to establish suitable links with the final market. Consequently, new forms of cooperation can have relevant impacts on buyer-seller relationships. In fact, they can be considered by traditional customers of small/medium local firms (i.e. big buyers) as threats or opportunities to deal with. Such a situation is occurring in the fashion industry, where recent developments (i.e. geographical diversification of the supply chains, global shift of manufacturing, increased power of retailers, emerging role of suppliers from “low wage” countries) seem to strain traditional marketing cooperation forms leading to the development of new forms. Empirically, the paper presents three cases which are investigated in depth and which represent innovative forms of marketing integration in local networks of fashion firms.

**Keywords:** relationships, marketing integration, retail, brand

## INTRODUCTION

The aim of this paper is to describe and interpret a phenomenon of innovation in cooperation between enterprises in specific contexts of the fashion industry on which for years our research interests have focused. The phenomenon to which we refer regards the emergence of cases of aggregation of companies that give birth to new forms aimed at the implementation of marketing initiatives. These forms are associated with the development of business-to-consumer practices, related to the creation and the management of a brand and/or the opening of retail outlets. Companies participating describe these initiatives as relevant innovations in their activity. Such forms of cooperation have features which differ from traditional cooperative strategies in systems of local firms, such as the formation of consortia that organize exhibitions.

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This paper explores new cases of marketing cooperation to evaluate the specificities of these innovative forms, their points of strength and weakness. Empirically, the paper presents findings from a case analysis process of three Italian cases of integrated marketing in the fashion supply chain, explaining the specificities in each case. The theoretical and managerial implications emerging from the paper concern to the role of these new forms in developing relationships in business to business markets. The cases we present emerged in the last decade. The path of research described in the paper is derived from the observation of these aggregations arising from the cooperation between manufacturing enterprises operating within local systems of Italian SMEs engaged in the production of fashion items. The phenomenon observed is linked to the changing marketing environment for companies forming part of local fashion systems (districts and other areas of production). The context of fashion is particularly exposed to the process of globalisation that has characterized the international economic scenario in recent years. The fashion industry (clothing in particular), has experienced significant changes in the supply chains of major manufacturers and retailers [Gereffi 1994, 1999]. Scholars highlight, for the nineties and for the next decade, an increasing "global shift" of manufacturing, from high-cost countries to newly industrialised countries [Jones 2002]. This evolution in the fashion industry creates tension in traditional relationships with customers and seems to encourage small-medium firms to find new ways to face the changing conditions in the environment.

The competitive process is interpreted not only at the company and sector levels, but even at the level of territory. Indeed, the problems of individual companies are often linked to conditions affecting, more generally, companies located in the same local reality. However, there is a significant variance in the performance of companies within the local context, at least given the surveys based on financial statements [Giunta and Bonacchi 2006]. Among firms within local systems and considering results from previous research [Johnsen and Ford 2000] (particularly with reference to textiles and clothing) two threats are detected. These threats are commonly described by two propositions that may appear related:

- (A) *increased ability of competitors from emerging countries*: the competitive ability of producers located in emerging countries (principally China) and their growing weight in the total purchases by existing and potential customers;
- (B) *increased power of direct customers*: either in terms of bargaining power or market power connected to the management of downstream phases in the chain (especially in management of brands and retail outlets).

The two threats, the first "horizontal" and international, the second "vertical" and not necessarily international, have been widely discussed as related to each other and linked to the more general phenomenon of globalization.

In this context, the phenomenon of cooperation we observe, is justified by enterprises, and often communicated outside, as an emerging response. In particular, these forms of cooperation seem to present the following characteristics, summarized through a series of parameters listed below:

- (A) Involve small and medium-sized manufacturers in the fashion industry;
- (B) Aggregate together companies on a territorial basis, in the cases proposed here nationally (made in Italy);
- (C) Include complex marketing activities such as opening of retail outlets and creation of a brand

The paper relates the phenomenon of collaboration above mentioned to the concept of "integrated marketing". In the next paragraph we develop taxonomy of integrated marketing forms to which we will refer in the case analysis. The case analysis is proposed in the third paragraph. The fourth paragraph proposes a discussion on issues emerging from the analysis of the cases of collaboration in fashion. We discuss some assumptions that may be verified through successive stages of our research.

## TAXONOMY OF INTEGRATED MARKETING FORMS

To analyze the type of collaboration object of our paper we resort to the concept of "integrated marketing". The integrated marketing theme is linked to the organizational literature on integration processes [Lawrence and Lorsch 1967, Thompson 1960]. The organizational integration is seen in other terms as a response to the need for marketing activities that does not find adequate response in individual companies. The issue has already been investigated in terms of relationships between firm size and export propensity. In the traditional international marketing literature, firm size was positively correlated with export intensity, defined as the share of export turnover. Some authors have argued that this relationship is not confirmed in the Italian context of small-medium sized firms [Bonaccorsi 1992], as in the case of SMEs operating in fashion which are giving rise to the new phenomena of cooperation. Until, at least, the eighties, it has been suggested that small companies were exporting a low proportion of their turnover as a result of factors such as the availability of limited resources (financial, marketing, R&D, managerial, etc.), the lack of access to economies of scale in manufacturing and the perception of high risk in international activities. In the literature, with respect to these issues, it has been pointed out that such limits are not sufficient to determine a link between firm size and export intensity. More precisely, it was possible to identify "counter-arguments" no less relevant against each of these issues [Bonaccorsi 1992].

The concept of "integrated marketing" can be interpreted on the basis of different meanings. To explain the concept of integration in marketing, we develop a taxonomy of forms. We can distinguish concepts of integrated marketing "within a firm" or "outside a firm".

With reference to the former, we can cite for example the integration which can be seen:

- (A) between marketing models adopted (such as mass marketing and relationship marketing);
- (B) between marketing levers understood as operational policies (distribution and communication);
- (C) between marketing and other functions (marketing and R&D, marketing and production, marketing and human resources).

The integration of marketing outside the firm in turn presents other possible cases. It occurs for example:

- (A) in the interaction between buyer and seller (relationships and networks);
- (B) in the forms of cooperation between competitors (for example, between firms belonging to industrial districts);
- (C) among players who have complementary resources (for example between different service firms in a tourist destination).

These forms of integrated marketing can be explained in depth considering the academic literature. "Integrated marketing" is defined by Iacobucci and Calder [2002], as a process of integration that involves the "extremis of mass branding and one-to-one relationship marketing." In this context integrated marketing assumes the character of an evolutionary concept of marketing adopted by organizations [Burresi et al 2006]. This concept is clearly linked to the integration of marketing policies in terms of operational levers. We have integration of marketing levers for example for firms operating in the high-end market in terms of coherence between retailing and communication processes [Holm 2006].

Schultz [2002] describes how the integrated marketing communications can and should be justified in terms of return on investment, "tailored approaches, such as direct marketing, allow an organization to become 'customer centric' primarily by being database-driven" [Iacobucci and Calder 2002]. Integration between marketing and other organizational functions is partly linked. In

this sense, marketing is said to be integrated when the marketing effort extends through the company in all aspects (and in all functions), rather than simply arise from the marketing department. This is another way of saying that the marketing effort has to be developed as a theme that has relevance for all functional areas. For example, the integration process can exert considerable influence on the training of operational staff that has direct contact with consumers in service, in the case of integration between marketing and human resources [Chimhanzi 2004] or on new product development in the case of integration between marketing and R&D [Souder and Sherman 1993].

In buyer-supplier relationships, the integration outside a firm assumes that marketing can become an interface function with other organizations. On this issue there are numerous contributions in the academic literature, which focus on the interaction [Håkansson 1982; Dwyer, Shurr and Oh 1987] or on the network dimension [Håkansson and Snehota 1995]. Firms involved can then:

- (A) remain those pre-existing;
- (B) set up one or more new organizational units.

Marketing can be integrated outside the organization when marketing activities not only benefit an organization, but rather a group of organizations. In this context, the marketing effort is made by an actor whose role is to engage an aggregation of organisations in a unified action. In this sense integrated marketing may involve specific co-marketing activities, where independent players can agree on embarking on a joint effort on any specific project or on a series of defined projects [Bucklin and Sengupta 1993]. When these projects call for the formation of a new organizational unit, the integrated marketing takes the form of giving a role to a particular player who directs a unified action. In this way the actor acts as a focal point for the interaction with the market (for example, the marketing activities of shopping centre promoters).

Referring to the conditions of success of small businesses exporting in international contexts, in an Italian research-oriented study, Bonaccorsi [1992, 629] showed how in industrial districts "there are personal and friendly relationships among entrepreneurs... when demand is increasing, entrepreneurs feel they can give information on export markets even to their local competitors, with the expectation that it will be reciprocated in the future, when needed." Marketing integration between competitors in local systems is not limited to the exchange of market information. In fact, marketing integration can lead to alliances for co-marketing, involving not two but a large number of actors, setting up multilateral partnerships rather than bilateral [Bucklin and Sengupta 1993].

The co-marketing alliances are defined as "mutual recognition and understanding that the success of each firm depends in part on the other firm" [Anderson and Narus 1990]. These alliances are forms of "working partnerships" undertaken by companies that want to build or amplify benefits through the implementation of a joint initiative involving coordination between the partners on one or more aspects of marketing. Unlike buyer-seller or manufacturer-distributor partnerships, co-marketing alliances are lateral relations which occur between companies at the same level in the value chain and represent forms of "symbiotic marketing" [Adler 1966; Varadarajan and Rajaratnam 1986]. Symbiosis is commonly defined as "the living together in intimate association of two dissimilar organisms for mutual benefit, and it is widespread phenomenon in the natural world" [Varadarajan and Rajaratnam 1986; Street 1975]. The same concept of "symbiotic marketing" is defined as "an alliance of resource programs or between two or more independent organizations designed to increase the market potential of each" [Adler 1966, 60]. In the field of alliances, the academic literature identifies forms of various kinds; generally it seems that "vertical relationships" [Johnston and Lawrence 1988] rather than "lateral relationships" [Bucklin and Sengupta 1993, 32] have received major attention.

The cooperation initiatives in the field of marketing, however, seem generally connected to forms of complementarity between the resources available to the partners involved. Consequently, previous studies on relations focused on the study of the behaviour of interorganizational exchanges [Benson 1975 1979], focusing in particular on the themes of functional specialization, scarcity of resources, emergence of dependency on resources between the partners [Pfeffer and Salancick 1978]. The presence of an asymmetric distribution of resources gives rise to an asymmetric power structure

[Emerson 1962] since the dependence on resources determines the rising power, defined as the ability to consciously exercise a clear influence. As the perceived effectiveness of the relationship is taken as an indicator of success in organizational theory [Van De Ven 1976] to be applied in particular in the context of dyadic relations [Ruekert and Walker 1987], there is a tendency for actors to prefer exchanges with equally powerful actors because there are fewer costs attached to the exchange process "[Cook 1977, 67].

This vision seems to depend on the involvement of existing resources in determining the dynamics of cooperation between existing organizations. Cooperation in the field of marketing, however, can be aimed precisely to the development of new resources, through interaction with the partner or the creation of new organizational units. The motivation for a company could be the realization of new marketing activities through the creation of new organizational units autonomous from those enterprises that will be cooperating. In this way relevant factors such as organizational compatibility between the partners involved in the process of cooperation are of lesser importance [Achrol, Scheer and Stern 1990].

Different situations emerge when the integrated marketing initiative creates a new organization. The integrated marketing in this context refers to a process that connects with the market, set in motion by an actor who takes a system of roles with reference to a group of companies and organizational concerns operating in a certain context. The form of marketing here is integrated in the sense that it refers to an aggregation of operators. It integrates the strategic and operational needs of these players and their effort to establish suitable links with the market. These operators can be "localized" in a specific area, or alternatively share a specific context or specific needs.

The development of relationships between firms and marketing processes related to these relationships have been investigated in depth by scholars of the IMP group [Håkansson and Snehota 1995; Snehota 2004]. Marketing emerges in this case in the context of organizational integration.

The same concept of market in this case is not defined as an impersonal mechanism which exists "out there", but that manifests itself in the form of specific customers. The market in this case appears as a network of buyer-supplier relationships. There can be two approaches to study relationships between organizations. In the first approach the relationship between buyer and supplier is described as an isolated phenomenon affecting primarily, if not exclusively, the parties involved (interaction approach). In the second approach, the buyer-seller relationship can be described as a part of a larger whole, as something dependent on an integrated set of connections and an interdependence of relationships (network approach). In this second case, the network extends the possibilities of interaction with the single organization.

The IMP approach essentially describes buyer-supplier relationships but is not without implications for the analysis of other kinds of relationships, such as those related to cooperation between competitors in specific sector or regional contexts, such as industrial districts. This cooperation is part of the network. In addition this cooperation can generate new actors (for example a consortium), which in turn can assume a role in joining the network. As outlined by Håkansson and Snehota [1995, 2] the network can increase the possibilities of interaction with single customers. The tasks assumed by the new actor generated by the cooperation cover activities that, for various reasons, single firms can't or do not want to play or can not play with the same effectiveness (for example, consumer marketing activities for organizations operating in an industrial marketing environment). In this way the relationship between organizations is not seen as created and developed in isolation at a dyadic level, rather it is seen as part of a broader context, which is a network of interdependent relationships [Håkansson and Snehota 1995, 3].

## CASES OF INNOVATION IN MARKETING COOPERATION

In this paragraph we are going to present some cases which show interesting evidence in terms of innovation in marketing cooperation. The cases *Classico Italia*, *Centopercento Italiano* and *I love*

*Italian shoes* differ from each other at least for the sector of the fashion industry involved, the number of firms linked to the projects and the peculiarities in terms of different levels of integration between BTB and BTC competencies. However, all cases show a general tendency in integrating branding and retailing activities, as an emerging response to threats perceived in the marketing environment. From a methodological point of view, while Classico Italia and Centopercento Italiano are built through in-depth interviews with managers, the case I love Italian shoes is the result of a deep analysis on secondary data (published articles, firm's reports, internet websites and fashion magazines).

## **Classico Italia**

The Classico Italia case is a relevant example regarding the integration of marketing activities for its most recent evolution from a consortium that represents exclusively members in business to business markets to a consortium that supports activities with reference to business to consumer relationships. Classico Italia is a consortium which represents 22 companies, and includes companies that operate in high-end fashion men's wear market localized predominantly in Tuscany, Campania, Lombardy, Veneto, Emilia Romagna and Piedmont. Classico Italia was set up as a means to defend the uniqueness of *made in Italy*. The participating companies are in fact complementary, do not overlap, but represent together one strength: Classico Italia is like, from the beginning, a virtual shop of Italian men's wear. From shoes to shirts, from the most formal to the casual chic clothes, from accessories to haute-couture, Classico Italia supplies shops with a high-level total look, able to satisfy all demands of a refined customer, even young and sometimes wearing informal clothes.

Classico Italia members are companies linked by industrial craftsmanship and focused on future markets. Companies which after being oriented exclusively on products, are now market-oriented. Often they have reached the second, maybe third generation (the average age of the firms is roughly 50 years, and the cumulative age reaches 1000 years), so that many of the young have leading positions: they have merged tradition with the needs of new markets and with the most innovative marketing. It's also thanks to them if Classico Italia, with total sales of 480 million Euros and 4000 employees in 2006, proposes itself as the leading group of Italian super-luxury.

The development of the associative form has seen during the past twenty years a peculiar path, where the integration of marketing activities has considered the implementation of business to consumer practices, along with business to business practices.

The birth, in the eighties, is linked to common sensitivities of associates to a competitive threat found in the difficulties to protect the "made in Italy" production in the competitive landscape of men's fashion. Another threat over the years was a gradual shift of events from Florence to Milan, at least for women's fashion, and the resulting willingness of a series of entrepreneurs (not just Tuscan), instead, of maintaining the city as the reference in male fashion. Consequently, the Consortium was founded, to face common problems, faced by competing companies belonging to the same level of the supply chain. From its genesis the consortium was set up for the purpose of representing a moment of aggregation and to sustain a unique participation to one in the most significant events worldwide in men's fashion, Pitti Uomo. In this sense, from the beginning (the foundation dates back to 1986), Classico Italia, exhibits in a pavilion dedicated to the collection of companies participating in the consortium. The management interviewed stresses the role of interpersonal relationships between entrepreneurs in the formation of the consortium and the focal role of some of them in promoting the initiative. In fact, Classico Italia, was set up thanks to a series of informal personal contacts (Granovetter, 1973), triggered by an entrepreneur (who acted as a leader). The manager interviewed stresses the leading role of one of them, Stefano Ricci, who represented the leadership of the association, allowing the collaborative phase.

The first years of the Consortium are in the field of coordination of marketing initiatives with regard to business markets. In particular it represents a way to improve the effectiveness of the relationships between associate firms and business customers. The activities of the Consortium, in the twenty years after the constitution, have been enhanced with other content, which are not in themselves

novelties in the consortia scenario. Classico Italia manages the participation to Pitti Uomo, organizes events and develops reports on foreign selling markets.

In 1996, the launch of the magazine “Classico”, not a house organ magazine dedicated only to companies in the consortium but a means to share fashion trends and build, maintain and strengthen a strong awareness of the brand name Classico Italia. So far this awareness has been created in business market, where operators are able to associate the brand Classico Italia, with significant characteristics such as high product quality, craft production and tailoring, exclusive fabrics and workmanship, ensuring a production made strictly in Italy.

More recently, the Consortium has integrated marketing activities in terms of business to consumer, along with traditional activities in BTB markets. Again, the stimulus for enlargement of the integration of marketing activities comes from environmental changes and the perception of a state of tension on the effectiveness of initiatives directed only to industrial customers. In 2005, some of the firms associated to the consortium created an autonomous reality, Classico Italia Retail Spa, in order to manage the opening of outlets “Classico Italia” in international markets. This is in line with the most recent trends of increasing relevance of the strategies of integration between industrial and commercial functions and the growing commitment on the part of many companies in the fashion industry to integrate downstream with the opening of outlets (Guercini, Runfola 2004).

The retailing initiative starts from the results of previous research commissioned by members of the consortium from a consulting firm, which aimed to identify the reputation of the brand Classico Italia with different stakeholders, such as industrial customers, retailers as well as end consumer and opinion leaders. A strong knowledge of the consortium for business customers and a lack of awareness of the consortium by the end market were highlighted. This was not a surprise considering the previous initiatives of the consortium which were oriented exclusively to business to business markets (no Classico Italia labels were and nor are put on the products). The same research aimed to find new strategies and new possible markets for the activities of the consortium.

The decision to integrate the opening of outlets within the consortium has as its goal the effective positioning of Classico Italia in final markets through joint management by the consortium or in partnership with foreign operators of shops with the brand name “Classico Italia”. The initiative has already started with the opening of a store in Almaty (Kazakhstan). The store exposes a selection of member firms' products in an area of approximately 300 square meters. The retail project refer to only a part of the associates (13 firms), which can get access to space (corner) in the store. There are already projects for future expansion through outlets in Russia and China; particularly sensitive to “made in Italy” productions.

The integration of retail marketing skills within an associative reality as Classico Italia, raises interesting evidence at least with regard to the following issues: (a) relations with traditional customers; (b) coexistence of BTB marketing policies with BTC marketing policies; (c) the relations between members in the consortium.

With reference to the first, it should be noted that relationships with customers mainly concern three types of customer: industrial buyers, represented by large manufacturing luxury firms (i.e. Hermes); distribution chains with high-end positioning (i.e. Neuman Marcus); independent shops (historic shops, boutique). Regarding the former, some of the members manufactures for major brands of fashion. These products are presented in the stores either with both brands (the brand of the supplier and the brand of the customer) or solely with the brand of the customer. The management interviewed highlights that there are no particular conflicts between the retailing initiative done by the consortium and the maintenance of these relationships. Rather, the strengthening of the brand Classico Italia in the final market, represents an element that can enhance the relationships with traditional industrial customers. Equal considerations can be highlighted with regard to retail customers (retail chains and independent stores), where the initiative seems to be considered positively. In some cases, however, the management interviewed underlines that the relational dimension is also a burden in developing the initiative. Previous relationships (licence or exclusive contracts) with distributors located in certain foreign markets may limit the participation of some members to the retail project.

With reference to the second aspect, it is appropriate to point out that the opening of the first store was a managerial experiment, which will, in the opinion of managers, lead to an extension in the number of sales outlets (at least another 2-3 openings in the coming years). A part from these, the retail initiative, in the intention of the management, is not intended to replace relations in industrial markets. In this sense BTB skills remain central in the consortium's future. This is also due to the fact that a growing and huge number of outlets is not considered consistent with the craft nature, of the made in Italy production of the consortium. Rather, the integration of BTC activities is seen as a means of learning for the members taking part in this initiative and a way to create brand awareness in the final market.

With reference to the third aspect, one can highlight a different degree of participation in the retail initiative among the companies. Some companies associated to Classico Italia have already autonomous development strategies in the retailing stage. This downstream vertical integration actually restricts participation in the Classico Italia Retail project. Other firms, which have no access to the end market have joined the initiative. And it is presumed by the management interviewed that in these terms, the development of Classico Italia Retail could include other companies not currently participating in the consortium Classico Italia, but which may have an interest in gaining access to the market. For the outlets "Classico Italia" this could represent an enlargement of the assortment with categories useful in a total look offer. In this respect it could be shown a different path between cooperation among firms in Classico Italia and cooperation among firms in Classico Italia Retail Spa, which represents at the same time a challenge for the survival of both the associative forms.

## **Centopercento Italiano**

The Italian Centopercento Italiano Consortium was set up in December 1997, on the initiative of a group of Tuscan entrepreneurs who were aiming to create a tool that would support their decision not to delocalize their manufacturing activities, but instead to maintain them within the original local area of their own entrepreneurial experience. From its outset, the Consortium was headed by its creator Andrea Calistri, the entrepreneur who conceived it as a centralized marketing body for the firms working in his sector. Between 1989 and 1992 Calistri was also the Chair of Mipel, the trade fair which at that time represented the most important exhibition of leather goods in Italy. But in the second half of the 1990s, ninety Tuscan leather industries withdrew from participation in Mipel, which, in the view of some of the major figures of the Consortium, had been entirely taken over by delocalizers. At present, roughly a decade on, the number of members of the Consortium has increased to over sixty.

The Consortium's activity is underpinned by the relation between leather firms operating in a local system and the marketing abilities acquired by entrepreneurs and managers present within the local system. This background enables the Consortium managers to have an in-depth view of the different aspects of the local area and the changing situation as it has affected manufacturing firms belonging to the Consortium. This integration among the actors who share the context – which leads to the above described integrated marketing – is embodied in the idea expressed by Centopercento Italiano that “the Consortium develops lines of action that start out from awareness that we are experiencing the same range of problems... this implies that we can grow together... or die together”.

Thus it has been noted that in recent years the manufacturing firms belonging to the Consortium have suffered a certain degree of loss of creative contribution to their customers, tending instead to accentuate the typical characters of an operator who sells only executive ability, or only working and processing time. “The idea we have been trying to uphold”, the Consortium management stresses, “is that of sparking initiatives which will allow the firms to revive their position on the market as a result of their creativity and not just on the basis of their processing ability. The first objective of our action has been to ensure that we do not lose a genetic heritage of creative ability which is still present”.

The case of Centopercento Italiano presents distinctive features as regards its retailing and branding policies. The role of these distinctive features is acquiring increasing importance in the type of

aggregate marketing represented by the Consortium producers who participate in this specific initiative. In particular the prefix “I”, which evokes the idea of Italy while at the same time also calling attention to the first person singular – “I myself” - in English, is increasingly being used in Consortium member projects. According to the concept expressed by the Consortium management, I-place is “everything that is promotion... portal, trade fairs, PR, sales outlet, events etc.”. The I-place concept can thus be expressed in various different forms: for instance, after the first sales outlet open in December 2006 and the second one in January 2007, there may be plans for further openings but also events and promotional measures on other European markets. In this context the functioning of the sales outlet “is connected to the possibility of generating traffic... making use of specific tools that reflect a strategy carefully prepared ahead of the project start-up”.

The concept of outlet proposed by Centopercento Italiano is that of a single point of sale with spaces reserved for individual producers. In the vision embraced by the Consortium management, it represents “a format that can be replicated, theoretically at least, without significant modifications... the various spaces relating to the individual firms’ productions are clearly distinguished in the context of the sales outlet... the firms are bound by contract to maintain a range of products while the methodology of sale to the public is a self-service system... with opening hours from 10 in the morning to 8 in the evening”. This outlet formula gathers together several dozen small and medium-sized manufacturing businesses that are endeavoring to reach the final market through a direct channel that operates via a single point of sale. At this point of sale, individual manufacturing operators that subscribe to the project have their own space available (their own stand). Products are selected by the customer according to a self-service approach, and sales are attributed to the individual producer on the basis of a bar code read by a scanner at the cash till. Thus “I-place” is the sign of the sales outlet that corresponds to a specific distribution format. At the first sales outlet this format has an overall size of over 1,200 sq. m, and the area is destined to increase by including the spaces devoted to the Consortium services (school, service center, refreshments) which will, partly on an experimental basis, also be made available to customers (consumers but also firms).

The Consortium that manages the sales outlet and the producers that access the direct channel through this format have taken on reciprocal obligations defined by means of a contract. The contract states that the sales outlet is, in itself, managed by the Consortium, but each operator presides over his or her own space, offering products of a value equal at least to a contractually defined minimum amount, and operating with the formula of the sales account. In this manner the manufacturing enterprise acquires a high profile and is able to boost its image. Thus although the manager of the outlet is actually managing a single outlet, in actual fact what is being managed is a group of producers for whom the outlet acts as their own terminal for access to consumption (direct channel). The Consortium deals with the organization and management of the sale of products on display. I-place thus acts as a distribution format for an “aggregate” of manufacturing actors involved in building up a direct channel to the market. This integration activity by the Consortium also helps to centralize the management of cash register service and the organization of the display space, which in other outlet centers is managed by the individual manufacturing enterprises in the sense that each manufacturer manages his or her own point of sale. The form of outlet examined here is seen to be particularly oriented towards the establishment of a direct channel for small and medium-sized manufacturing producers, who cannot or do not intend to commit their resources to the direct management of a point of sale. By virtue of the consortium solution, small businesses of this kind have an opportunity to achieve a direct contact with the market. This formula involves delegating responsibility for a number of functions to the unitary organs of governance of the aggregate: in the case of the Centopercento Italiano Consortium the extent of delegated functions is even greater than is the case when a traditionally organized shopping center entrusts a promoter with this type of assignment [Beltramini and Taylor 1993; Greenspan 1987].

A key point in the developmental potential of the Consortium’s retailing plans is the possibility of moving towards a proliferation of points of sale. It would appear from interviews and contact with the top management of the Consortium that the situation on this front seems to be still open to developments of various different types. At the present time, a first proliferation of I-place has already been started up with a second permanent opening of this format, as stated by an exponent of

the Consortium. The Consortium management also point out that “the format proliferates not only in the permanent forms, but also in other forms such as show rooms or temporary trade fairs, including trade fairs abroad on the occasion of special events in some of the major international locations”.

What becomes clear from this overview is that the retailing and branding operations have a strategic nature and represent a response to a structural change in the market. In the past there was a prolonged period during which placing their products did not represent an extremely arduous task for the leather manufacturers who now belong to the Consortium. As underlined by the top management of the Consortium, “our entrepreneurs are not accustomed to selling: they are used to being sought out by the purchasers... when world productions shifted to a different area and there was a dramatic drop in orders, our producers often proved quite unable to sell”. Today the traditional manufacturing abilities are no longer felt to be sufficient, although they have by no means been lost and indeed are still strongly present. But it is necessary to foster a less “passive” manner of relating to the market among small leather producers, given the new structure of the international market.

Thus one of the significant features emerging from the Consortium’s marketing experience is the importance attributed to the role of the seller, seen not as a mere procurer of contacts and of turnover, but as a generator of values and relations. The management has acquired direct knowledge of the situation of production in emerging countries such as India, Vietnam or Indonesia, where “the conditions of protection of labor and the environment are extremely difficult as compared to our context or production... on this plane it becomes very evident to someone who has acquired knowledge of the situation that our product is based on a process quite different in terms of ecological and social impact from that one which is realized in those countries”.

Thus the crisis that has been observed in recent years has specific characters from this point of view, calling for a vigorous response, and this is a new phenomenon for such firms. This is the framework in which the plans for establishing an outlet as a direct channel from the producer and for setting up an outlet brand have arisen.

The Consortium management underlines the importance for the Consortium’s activities of relations, including personal relations, that have been built up with their members, with the local system policy makers and with the great fashion system groups. In the management’s vision, such relations also have an important human dimension and are not based exclusively on economic considerations.

As far as relations with stakeholders in the local area are concerned, substantial importance is awarded to the interface with associations in the leather sector and above all with the local authorities, in particular as regards support for training. In addition, the situation in which the Consortium’s activity takes place is strongly linked to some of the celebrated fashion brands, which represent the most significant sources of orders for the firms belonging to the Consortium. These brands include some of the famous names in the world of international luxury (Chanel, Dior, Roberto Cavalli, Valentino, Bulgari, Aigner, Hermès, Louis Vuitton, Fendi, Dolce and Gabbana etc.), and some of them, such as Gucci, Prada, Celine and Ferragamo, have production activities of their own working directly in the same local area as that in which the largest part of the Consortium enterprises operate (Central Tuscany). In developing its activity, the Consortium has sought to avoid entering into conflict with these famous names and their production activities, but has aimed instead to set up a relation of cooperation for reciprocal support of the interests involved. The management of Centopercento Italiano believe that at least a part of the management of these luxury groups share the view that enhancement of relations of leather goods suppliers with the market is also in the interest of the great brands. The relationship with these actors (the “griffes” in the terminology utilized by the Consortium management) played a role in the positioning of the project to open the sales outlet according to the formula described earlier. The interest shown by great luxury brand purchasers in Centopercento Italiano’s activities can be summarized by at least the following two points:

- keeping alive and stimulating the capacity for independent research shown by manufacturing suppliers of leather goods involved in the project;
- supporting the product image so that pricing policies adopted by the outlet remain coherent with the typical characters of products belonging at least to a medium-high band.

Of these two points, it is in particular the first one that is presented to the great brands as a factor which is coherent with their interest in maintaining an array of local suppliers that have creative

energy and inspiration. With regard to the second point, this has been taken into account by Centopercento Italiano in the sense of adopting a non aggressive approach to pricing for the products sold via the direct channel arising from the “I-place” format.

As the Chair of the Consortium points out: “our relation with the large customers of the individual enterprises is good... the large clients could have adopted a hostile attitude but actually this did not prove to be the case; in the eyes of these enterprises our presence has been associated with something that is also useful for their policy of local sourcing ... by generating dynamic forces capable of preserving creativity and the independent contribution of their reference suppliers... in some cases we received concrete support from them... the main referents showed a desire to demonstrate cooperation and good neighborly relations”.

The particularly good relations with certain customers is underlined by the request stemming from some of the latter to have the Consortium certification on their products, and this has prompted other suppliers of these customers to join Centopercento Italiano.

The Consortium Chair underlines that their action “seeks to refocus attention on the product, on its material dimension but also on the associated immaterial dimensions... in the stance adopted by some brands the value given to the product risks being minimal as compared to the brand image... for our best customers the product remains an important element of their strategy” and the policy espoused “has been that of placing emphasis on the sale of products and of value, not just of a status symbol”.

This being said, it should also be kept in mind that according to the Consortium’s vision the strengths of the Consortium’s organization lie in broadening the member firms’ strategic potential, in devising and setting up a strategy for competition, and in the manner of linking up with the market. However, the management believes the Consortium also boasts other strengths, “in overturning the mindset of enterprises in our context... in driving the shift away from waiting for a buyer towards a sales-oriented attitude”. In this sense the Consortium is not merely a tool to address individual initiatives: it assumes the nature of a place where strategies for the entire aggregate group are shaped and deployed.

According to the Chair of the Consortium, “the idea of I-place is that of a meeting place, a venue where today one finds the possibility of working in a business-to-consumer framework but with an approach that is non antagonistic, an approach that is not necessarily viewed as a substitution for a business-to-business activities... On the contrary, the firms are prompted to “short-circuit themselves” with the worldwide consumer, one of the reasons being that this helps them to be more successful in offering their own specificity in response to the demand arising from the great industrial customers. In relations with these buyers “I-place is proposed as a meeting place, as a permanent showroom, characterized by the creativity that derives from contact with the customer... in this sense, I-place acts both as a physical venue, i.e. as a format, and also as a virtual place, i.e. as a portal”, in which to build up and develop the relation with the customer.

Suggestions have also been put forward to integrate the first permanent I-place outlet in the florentine area (Scandicci) with other activities of significance for the Consortium. As mentioned earlier, such activities include the Service Center, for prototyping, computerized cutting, taylor-made formulas. In the words of the Consortium’s top management, “this is a co-presence that is fully in harmony with the role of I-place as a meeting point for contacts with the industrial customers, as well as its role as a point of sale for retail consumption”.

In the framework of relations with the main actors, i.e. as customers of leather production firms, a particularly important role within the perspective of the world market has been played by a long-term relation with Gucci, the most important company in the leather industry in the florentine area and a great protagonist of this sector at an international level. This relation played a significant role in some of the consortium’s strategic activities, such as human resource training.

However, the nature of the main danger stemming from relations with the great international luxury brand groups is clear to Centopercento Italiano. The Consortium’s leaders note that “this area has become fundamental for their purchasing activities, because it is qualitatively significant, but it is in some sense also a “fief” of the great players... with small but even medium-sized businesses increasingly oriented towards the “sale of minutes” of working capacity... in our view, competing on

production efficiency is unlikely to lead to a positive outcome for the manufacturing experience of this area... if that is the route adopted, then within the space of ten years this whole area could be deindustrialized". The mission of the Consortium and the first goal of its projects is precisely to avoid this kind of evolution, and this is a goal with regard to which it is fully in tune with the approach adopted by the main regional industrial policy makers and the other local authorities of this area.

## **I Love Italian Shoes**

I Love Italian Shoes was set up by A.N.C.I., the National Association of Italian Footwear Manufacturers, which groups together approximately 1,000 Italian footwear manufacturers. The turnover produced by the member companies represents approximately 70% of the overall Italian footwear production. To understand the significance of this case in terms of integration of marketing activities, it is necessary to carry out a premise on footwear sector.

Italy is the leading shoe manufacturing country in the EU, holds sixth place amongst world-wide footwear manufacturing countries and is the fourth largest exporter of footwear in the world. This is an indication of the success of the Italian footwear sector which with its 6.657 companies, 94.143 employees and a trade balance which has always been active, is of considerable qualitative/quantitative importance to the Italian economy and represents one of the pillars of the Fashion Network. The features that distinguish the Italian production are linked to excellence in finding high quality raw materials, accessories and components, elevated capacity for innovation, skills in labour, thanks also to the existence of professional training schools, high fashion trends, made in Italy image. Looking to the footwear industry, the success of the Italian manufacturers is also linked to an enterprising spirit and to the typical structure of the sector which is part of a network, an operational system consisting of sub-suppliers of raw materials, tanneries, components, accessories, machinery manufacturers, model makers and designers. This has resulted in a territorial concentration of companies and the formation of shoe manufacturing districts (which includes several region as Marches, Tuscany, Venetia, Lombardy, Campania, Apulia and Emilia Romagna, covering 23 provinces). However the sector experiences trends that were not yet quite positive, but the markedly negative trends that had characterized the past five years have begun to dissipate, while several signs of a potential reversal have begun to emerge. In the approximate picture that emerges, some of the more obstinately negative indicators include the trend in volumes produced and exported, the most recent record reached by the incoming flows of commercial trade, decreasing levels of employment, and the balance of company openings and closures.

A.N.C.I. has represented the Italian Shoe Industry since 1945. The purpose of A.N.C.I. is to examine, support and promote projects (of an economical, technical and scientific nature) and to represent the same on all institutional levels. A.N.C.I. Servizi S.r.l. is the association's own services company through which it manages the communication mix of the association and it organises the MICAM shoe event, a leading world wide footwear exhibition,

The association is particularly dedicated to promoting the category on the most important foreign markets in order to ensure the good image and the presence of Italian footwear which is renown for its creativity, style, original design and precision workmanship of an artisan nature, as well as for the use of carefully selected materials. In this context, "I love Italian Shoes" initiative was set up. It was designed and managed directly by A.N.C.I. Even in this case, the stimulus for the integration of marketing activities is related to the state of tension generated by new trends in the international arena. Considering the latter point, the National Association of Italian Footwear Manufacturers in 2003 has created the initiative to sustain the authenticity and value of Italian footwear production through the development of the logo and the brand "I love Italian shoes." The main aim of the initiative is to make consumers more aware when buying footwear, on the origin of the product and

in particular on the characteristics of a product made in Italy, as well as protecting Italian products from risks of counterfeiting.

This initiative, managed at the level of the association by project groups, has seen over the years a path of development, through the gradual integration of marketing activities, which have joined, from time to time, only part of the associates. It is possible, on the basis of activities carried out, to highlight an evolutionary path that has followed the following steps:

- Launch of the brand "I love Italian Shoes" and development of communication campaigns;
- Implementation of labels "I love Italian Shoes", to be put on footwear products of firms belonging to the association, which produce fully in Italy;
- Retail development project, with the opening of outlets "I love Italian Shoes".

The Association has initially concentrated its efforts on developing brand awareness on the logo of the initiative, by building a strong brand name. The choice fell upon verbal elements as "I love Italian shoes" and figurative elements. We can consider separately the brand components (Botton et al 1992) the prefix "I", the figurative elements which are used to represent the verb "love" and the verbal component "shoes". The prefix "I" evokes the idea of Italy and at the same time also calling attention to the first person singular - "I myself" - in English. The figurative component concerns the word love, which was developed through a figurative sign formed by two red shoes put together to outline a heart. The brand includes the term shoes, which obviously represent the product of the association. For the launch of the brand, the initiative provided a strong communication campaign through mass media (releases on newspapers, magazines, etc...) and through merchandising in footwear specialised outlets. The integration of marketing activities, in the first stages regarding the initiative covered then the creation and dissemination of awareness of the brand in order to sensitize the market on the characteristics of Italian production and on some elements of superiority compared to foreign productions.

With the growing awareness of the brand, especially in the domestic market, the Association has promoted the use of labels "I Love Italian Shoes", which spread at the moment, has reached nearly 12 million copies, to be stamped on the footwear produced by the firms associated to A.N.C.I., whose production is fully made in Italy. There are about one hundred associates of A.N.C.I., proposing their product with two labels: the firm's label and the "I love Italian shoes" brand. In this sense there is a virtue circle which enforces the awareness of the brand to the public, and which gradually can achieve effectively the goal of fighting against counterfeit and protect the real Italian production.

More recently the "I love Italian shoes" initiative has seen a step further, with the launching of the retail project in March 2007. The association, supported by regional and national public institutions, is now focusing its efforts in opening stores with the brand name "I love Italian Shoes" in foreign countries. This is an initiative of vertical integration in the management of outlets, which enriches the arrangements for liaison with the market for companies involved in the project.

The retail project initiative can be analysed, taking into account two moments. Firstly, the project was presented in MICAM event. In that occasion a prototype store "I Love Italian Shoes" was arranged in the spaces of the Fiera Milano. Many contacts were initiated by A.N.C.I. with foreign entrepreneur, former owners of shoe shops in their countries of origin, who shown interest in opening outlets "I Love Italian Shoes". Applications were received from many international actors: 22 from different Russian cities, while others from Hungary, Brazil, Canada and Florida; also particularly promising contacts with the holders of prestigious stores in Turkey and South Africa. It was then proceeded with the opening of a store in Russia. The outlet "I Love Italian Shoes" was inaugurated on March 3 in Omsk in Russia. This point of sale displays over an area of 350 square meters a qualified selection of footwear production made in Italy. The retail initiative has involved 20 national

brands from Tuscany, Puglia and Marche (all A.N.C.I. associates), with the financial assistance of the three Regions and a contribution from the Ministry of Productive Activities. The investment was 1.2 million Euros and has been shared by a private partner, which already operates in Russia and which has coordinated the initiative. The success of the initiative has attracted interest from other markets (India, South Africa, China and some European countries) which will be the focus of future initiatives. With this regard a working group has been formed to manage such projects in order to ensure the partners of the real origin of the "Made in Italy" products. In the next months of 6-8 outlets are scheduled to be opened.

Considering this case in terms of relationships with traditional customers, the strategy of response to environmental changes adopted by A.N.C.I., can be seen as a fact or element that accentuates the closure of buyer-supplier relationships in the industrial markets (for a greater connotation of consumer marketing) or feeds with new items relations between companies located territorially and traditional industrial customers (greater powers of branding and marketing outlets can promote the relationship, "they speak the same language"). In this first phase of the project, one can highlight a connotation in terms of more enrichment of the existing relationships, thanks both to the upgrading due to the development of the brand and to learning processes activated by companies participating to this initiative.

### **EMERGING ISSUES IN NEW INTEGRATED MARKETING FORMS**

The cases considered in the paper are a limited number (three), but involve a large number of small and medium enterprises (in total about two hundred). The three cases are similar in several aspects, starting from the context in which they have been developed, which is the fashion system (leather goods, clothing, footwear). The cases analysed present some forms of cooperation between enterprises in the field of marketing that are "innovative" in the sense that create marketing initiatives that were not carried out by single companies. These marketing initiatives affect the field of consumer marketing, in particular retail strategies and branding policies, and are added to the traditional marketing activities in the field of business to business marketing.

The initiatives described in the three cases, refer to the phenomenon of cooperation which has led to a new actor, quite small. The actor usually takes the form of the consortium or company with a large number of associated (about twenty, seventy, one hundred in the three cases considered). More than aggregate a critical mass of existing capacities to achieve scale economies, the phenomenon observed gives life to a unit specialized in marketing tasks giving rise to scope economies. We must say that the cases presented in the previous paragraph do not support the assertion that there is an increase in the size of the unit devoted to specific marketing initiatives. Rather than economic scale (output growth associated with reduction in average unit costs), there are scope economy (distributing among a large number of subjects an indivisible cost). In this sense the new organizational unit of a consortium agreement is a further small or medium-sized enterprise specialized in a specific marketing task. Unlike typical district firms, this unit covers a function which could be relatively not covered within the district. The non typicality and the newness of the kind of initiative is confirmed by the fact that this type of business is generated through cooperation between enterprises based on the initiative of a leader entrepreneur, and not through the initiative of an entrepreneur who founded it autonomously.

The cooperative initiative seems to be naturally associated with a widespread thinking that these companies "together" can do things that are not possible to be done individually. These initiatives include marketing activities which are new for district firms, such as branding and retailing. The basic idea can be summed up with the famous words "unity is strength". In fact, these initiatives present some strengths and weaknesses that we try to summarize in the following terms.

The strengths include:

- (A) access to experiences of business-to-consumer or business-to-business without important investment for individual members;

- (B) the new autonomous actor (made up by cooperative marketing strategies) is able to do things that individual companies are not able to or can not do.

In addition to these forces, there are weaknesses such as:

- (C) the new actor is often a new "small" actor, which is in addition to those already present;  
(D) the new actor action could result in competition with that of existing individual companies.  
This can happen later than the birth of the new player.

From the case analysis emerges a first question, which we might define as follows:

Q1 Which kind of integrated marketing is set up through the processes of cooperation between the companies observed?

At this point, we can only stress that the cases presented reflect the creation of new organizational units (consortium) and the creation of forms of integration between the marketing activities carried out by these and the marketing activities carried out by individual companies. The integration of existing resources generally appears difficult, and in fact quite limited. Using the words of a member of one of the forms above described "the sum of many compact cars is not a sport car"

The development of the new players is associated to innovative marketing policies for the firms of the fashion system involved. These policies are translated in the development of branding and retailing processes which directly affect the relationship with the final market. These initiatives, however, do not seem to take, at least in some cases, a relevant impact on the turnover of the companies involved. For example as regards to the policies related to the opening of new stores, these cases of aggregation give birth to a still limited number of outlets, and also the scheduled openings do not seem to absorb a large proportion of the total turnover of the companies involved. For firms oriented to a slight investment [Bonaccorsi 1992, 631], this form of cooperation is a way to invest not heavily in learning processes regarding branding and retailing. This explanation is important, but the question seems worthy of further study. It follows then a second question from the analysis of cases. We might define it as follows:

Q2 Which are the reasons that encourage companies to establish these innovative forms of marketing cooperation?

The reasons does not seem linked, given the existence of these consortia for years, to the searching neither for a replacement of direct customers with the final market nor for the substitution of old business customers with the acquisition of new business customers. The phenomena analysed seem quite connected with the activation of learning processes by companies involved in integrated marketing initiatives. This is not a new way, which has already been observed in earlier forms of marketing cooperation between small and medium firms in italian district. The collective nature of the learning processes has been found in the literature [Becattini 1987; Dei Ottati 1995]. These companies, or at least a leader among them, feel the need to learn from business-to-consumer in order to improve their business-to-business relationships. This path can be assessed as a way to develop the "service" attribute as a factor which small and medium companies in fashion can use in their existing relationships. As shown by Bonaccorsi [1992, 626], Italian exporting companies have been successful not because their marketing excellence, but for the characteristics of the product/service they offer. The cases we analyse can be read as attempts to develop learning processes in term of marketing abilities and/or as integration of marketing resources from the outside, sharing costs with others.

These learning processes are not limited to the relationship with final consumer, to whom the marketing initiatives are directly oriented, but also to business customers, both new and existing ones. The relationship between the players in the phenomena objects of our attention can be

interpreted in a network approach [Håkansson and Snehota 1995]. This network presents various relevant actors, including:

- (I) the individual companies in the fashion system;
- (II) their competitors in the sector and/or territorial context;
- (III) the new player (consortium companies) designed to manage new marketing activities;
- (IV) direct customers (usually other companies);
- (V) final consumers.

From these elements a further question emerges:

Q3 Does the consortium, within which the company is involved, change the relationship with the direct customer?

We wonder how and if, within the network, relationships between firms involved in these new forms of cooperation and their direct customers could change. The buyer-seller relationship is within a network context, in which the actor generated by the marketing cooperation is fully a part. This change could have for example a negative impact if this initiative could be perceived as threatening by the direct customer, and therefore could lead to a negative reaction against companies involved in the cooperative form.

The cases, however, reveal that the direct customer take a positive attitude toward these integrated marketing initiatives, since the extension and the approach to the final consumption does not appear to represent a real threat. Rather, one can find benefits for direct customers, resulting from the learning processes and the improvement of the image of their suppliers.

The phenomena of marketing cooperation observed are significant even in a logic related to the territorial context. It seems clear that in the cases analyzed the phenomenon of innovation in marketing cooperation is made possible by a widespread perception of threats which must be faced and the perception of the limits of individual firms in dealing with these threats. The aggregation, however, would not have been possible in absence of leader entrepreneurs. In particular, the territorial context assumes a central role in the cases examined. This leads us to formulate a fourth and final question:

Q4. Does the territorial context represent an effective base for the integration of the organisations involved?

Companies in the cases analyzed in the previous paragraph are put together on a territorial basis to exploit the origin of the product (country of origin effect). However, the integration processes observed are pre-existing and take characters of typical social and cultural realities of their district [Dei Ottati 1995] or at least the local systems business. It seems that innovative forms of marketing cooperation appear as the result of a continuity with the legacy of the territory, even with the limits they have.

## **FINAL REMARKS**

In conclusion, it is possible to summarize the main differences between the new integrated marketing forms investigated in the paper and the traditional marketing forms already existing in systems of local fashion firms. These differences can be related to two main aspects:

1. *The nature of the marketing activities which have been integrated.* In all the cases we observed, branding and retailing have been considered relevant activities in order to face with

the changing environment. This integration seems in line with the general tendency proposed by large scale players which are more and more vertically integrated in the downstream phases of the supply chain/channel.

2. *The integration between marketing management practices and industrial practices through the rising of a new actor*, which is a new player in the network. However, this integration between BTB and BTC functions seems to be unbalanced, as the industrial marketing competencies remain dominant within the companies involved in the cooperative marketing initiatives. Furthermore the core business of the cooperative actor remains, at this stage, the development and the maintenance of business relationships in BTB networks.

Future research should consider the effectiveness of these innovative forms in terms of performances, either for individual companies or for the cooperative actor. Another theme to be further addressed regards the sustainability of the new actor in the long term, especially if we consider that many of the activities planned and communicated to the market seem to face problems related to difficulties in managing several new dualities (BTB vs BTC, cooperative retailing vs company retailing, company branding vs cooperative branding). These challenges represent elements which can lead to the failure or to the success of the innovative marketing forms.

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