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ITALIAN HANDICRAFTS IN THE EURASIAN MARKETS. A CASE STUDY FROM THE CERAMIC CLUSTER OF NOVE-BASSANO (Vicenza-Italy)

The article presents the results of a research aiming to discuss growth potentials of small, and medium handicraft firms operating in stagnating sectors. The study uses a methodological approach juxtaposing theoretical analysis of latest scientific literature and economic statistics to empirical studies of selected firms. The analysis shows how single firms succeeded in overcoming structural weaknesses to build competitive position in global markets. The paper focuses on the artistic cluster of ceramic of Nove-Bassano (North-Eastern Italy), and on the firm "Ceramiche Fratelli Lorenzon" as a case study of successful handicraft export-oriented family business. The principal argument of the paper is that firms, and in particular small, and medium handicraft ones, can find growth opportunities even in declining sectors, provided that they succeed in transforming traditional approaches through process, product, and marketing innovation. Secondly it argues that modern technologies, and in particular IT, open new possibilities even to small businesses. Finally, it confirms the still relevant role of "made in Italy" as internationally valued brand.

Key words: Eurasia, Industrial Districts, Industrial Policy, Handicraft, Made in Italy, Economic History.

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Еуразия нарықтарындағы Итальяндық қолөнер кәсібі (Нове-Бассано керамикалық кластері мысалында (Виченца-Италия))

Мақалада тоқыраушы секторларда жұмыс істейтін шағын және орта кәсіпкерлік фирмаларының өсу мүмкіндіктері талқыланатын зерттеудің нәтижелері келтірілген. Зерттеу әдіснамалық көзқарасты пайдаланады, яғни соңғы ғылыми әдебиеттер мен экономикалық статистиканың теориялық талдауын жеке фирмалардың эмпирикалық зерттеулерімен салыстырады. Талдау жеке фирмалардың әлемдік нарықтарда бәсекелестік жағдайды қалыптастыру үшін құрылымдық кемшіліктерді қандай тәсілдермен жойғанын көрсетеді. Мақалада қолөнер бұйымдарын экспорттауға бағытталған табысты отбасылық бизнестің үлгісі ретінде Нове-Бассано керамикалық кластері (Солтүстік-Шығыс Италия) және «Ceramiche Fratelli Lorenzon» фирмасы талданады. Мақаланың басты дәлелі – кіші және орта кәсіпкерліктер процестерде, өнімдерде және маркетингтегі инновациялардың көмегімен дәстүрлі тәсілдерді өзгерту арқылы тоқыраушы секторларда да өсу мүмкіндіктерін таба алады. Екіншіден, қазіргі заманғы технологиялар, әсіресе ақпараттық технологиялар, тіпті шағын бизнес үшін де жаңа мүмкіндіктер ашады деген пікір бар. Ақырында, мақала «Италияда жасалған» деген әлемге әйгілі брендтің әлі де өзекті екендігін растайды.

Түйін сөздер: Еуразия, өнеркәсіптік аймақтар, өнеркәсіптік саясат, қолөнер өндірісі, Италияда жасалған, экономикалық тарих.

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Итальянское ремесло на Евразийских рынках (на примере керамического кластера Нове-Бассано (Виченца-Италия))

В статье представлены результаты исследования, целью которого является обсуждение возможностей роста малых и средних ремесленных фирм, работающих в стагнирующих секторах. В исследовании используется методологический подход, сопоставляющий теоретический анализ новейшей научной литературы и экономической статистики с эмпирическими исследованиями отдельных фирм. Анализ показывает, как отдельным фирмам удалось преодолеть структурные недостатки, чтобы создать конкурентные позиции на мировых рынках. Статья посвящена керамическому кластеру Нове-Бассано (Северо-Восточная Италия) и фирме «Ceramiche Fratelli Lorenzon» в качестве примера успешного семейного бизнеса, ориентированного на экспорт ремесленных изделий. Основным аргументом статьи является то, что фирмы, в частности мелкие и средние ремесленные, могут найти возможности для роста даже в убывающих секторах при условии, что им удастся трансформировать традиционные подходы с помощью инноваций в процессах, продуктах и маркетинге. Во-вторых, утверждается, что современные технологии, и в частности информационные технологии, открывают новые возможности даже для малого бизнеса. Наконец, это подтверждает все еще актуальную роль «made in Italy» как всемирно известного бренда.

Ключевые слова: Евразия, промышленные районы, промышленная политика, ремесленное производство, сделано в Италии, экономическая история.

Introduction

The article investigates growth potentials for small and medium handicraft firms operating in stagnating, or declining sectors through literature overview, examination of statistical data, and of an empirical case study. Juxtaposing traditional economic analysis of the sector long term crisis, to the reconstruction of the business-story of a selected firm allows us to highlight counter-trends, and to investigate the reasons of a success story within a declining sector. The paper actually demonstrates that small businesses can be successful even within unfavourable economic contexts provided that they succeed in "changing the traditional rules of the games" through radical innovation in processes, including marketing, and production. It also argues that such experiences, in the long run, lead to sector's transformation through imitation processes by other firms, which, in turn, contribute in upgrading it towards higher level of competitiveness, eventually reversing sector's current negative trends.

Methodological approach unites traditional quantitative analysis, with the interpretation of empirical qualitative data obtained from interviews to entrepreneurs, and firms' association representatives. This allows juxtaposing to the clear picture of the sector's evolution in-depth glimpses into real business processes. The paper presents the first analysis of a wider research on excellent export oriented Italian handicraft business operating in sectors facing crisis, or stagnation. The sector's selection is based on the criteria of relevance within the regional and national economy; of its historical importance; of its recent critical trends in terms of turnover, number of operating firms, and of employees. The firm's case study, on the other hand, represents a clear example of small family-run artisanal businesses using up-to-date technologies, innovating products and processes, and fully exploiting globalization in order to consolidate competitive positions in niche-markets, bypassing by this way the structural limits that force less innovative businesses to accept unfavorable market conditions.

The study's conclusions are that enduring industrial crisis mirrors profound changes in the world economy. These processes constitute at once a threat for traditional sectors exposed to concurrence, and shrinking domestic markets, as well as an opportunity for those firms succeeding in positioning itself in high quality niches. New technologies, on the other hand, offer the possibility to innovative small and medium business to develop strategies previously typical of bigger organizations.

Theoretical Review

The paper significantly contributes in innovating available scientific literature. Studies on the Nove-Bassano artistic ceramic cluster focused mainly on its century-long brilliant development, explaining in light of history causes, and factors having enabled the emergence of world renowned clusters (Favero, 2006). The explanatory model – as a matter of fact common to most Italian clusters – juxtaposed environmental, social, cultural, and, last but not least, political factors having created a unique system of high quality, flexible, competitive handicrafts. The production of artistic ceramics in the area Bassano-Nove (Vicenza province, Vento region, Italy) holds a century long tradition. Its origins date back to the Ancient Time, when local inhabitants firstly exploited the presence of clay and water to produce dishes, cups, and other items of everyday use. The development of ceramic production as commercial activity, however, started only during the Venetian period. In the 17th and 18th centuries firms as Mainardi, Salmazzo, Dalla Valle and Antonibon – the later still active in Nove – rose as internationally renowned producers of plates, trays, food covers, cups, mugs, pourers, pharmacy jars, as well as ornamental articles like candelabra, frames for mirrors and windows, decorated tiles, fonts. Analyzing these experiences, literature highlighted the role of handicrafts both as upgraders of quality, and as incubators of new firms, as employees created their own activity after having acquired the necessary competences, and skills (Fontana, 1997). The relevance of the political order for long term growth of a manufacture deeply linked, above all in its artistic, high quality segments to upper classes, and government contracts, has been stressed in relation both to the crisis following the collapse of the Venetian Republic, and to the late 19th century growth, that, though interrupted by the both World Wars, lasted until the early 1990s. (Lane, 1954; Stringa, 1987; Favero, 2006; Guidolin, 2013) The relevant expansion of the sectors in the second half of the 20th century, was also explained by the leading role of certain markets – first of all the North American one –, and of "big buyers" who, based in Milan, Florence, and Rome, travelled through Italy searching for high quality, competitive handicraft productions (Guidolin, 2013). Skilled artisans, low salaries, and tradition have been interpreted as unique competitive advantages. Orders poured into the cluster by foreign buyers alimented a steady growth of overall turnover as well as of the number of firms specialized in artistic ceramics. Along with the above mentioned factors, scholars stressed the relevant role of technical education. Ceramic schools appeared already in the early 19th century – as the case of the "Scuola di Disegno e Plastica Applicata alla Ceramica G. De Fabris", becoming in the 20th century one of the most important and renowned ceramic school in Italy (Ericani, 1990a).

The trend was interrupted in the 1990s, when the whole sector fell in a deep crisis that is not yet overcome, and lost more than 42 per cent of its firms, employees, and turnover. The reason of the crisis, along with general factors mainly linked to the European monetary unification process, and current macro-economic policies, have been sought analysing a broad set of causes. Fierce price concurrence among district's firms; lack of direct contacts with the final clients, the bargaining power of "big buyers", traditionally monopolising the market; old fashioned approaches to production, design, and marketing; lack of technological, product and process innovation; as well as limited self-financing and over reliance on bank credits all play a role in explaining the sector's downward trends (Confartigianato Vicenza, 2002-2010; Guidolin, 2013).

Often grounded on the vast literature on Italian industrial clusters, available scientific literature gives brilliant insights on sectors trends, strengths, and weaknesses (Storper, Scott, 1989; Anastasia, Coro', 1993; Anastasia, Coro', 1996; Beccattini, 2007). Other approaches focus on local analysis, reconstructing development stories of homogeneous geographic areas (Storper, 1989). The study of countertrends at firm level, though of relevant heuristic potentialities, still remains, however, marginal.

Sectorial Analysis

The Nove-Bassano artistic ceramic district is one of the 17 industrial clusters of the Veneto Region, as officially recognized by Regional, National, and European legislation. Along with the clusters of Sassuolo, Faenza, Civita Castellana, and Modena it constitutes the bulk of the Italian ceramic production (Confartigianato Vicenza, 2002-2010). The districts production is vastly concentrated around the cities of Bassano and Nove, hosting most of the district's firms. Shaped by a century long history in ceramic production, the area is still characterized by a very high "sectorial specialization index" (figure 01), which, in turn, demonstrate the cluster's resilience capacity in front of negative economic trends. Notwithstanding the decade long crisis, in fact, entrepreneurs didn't massively flee the sector, managing, though often at lower levels of production and turnover, to keep their business running. Most firms are of small, and medium dimensions, and can generally speaking be classified as "artisanal", with regard to the fact that labor, and not technology, still represent the essential factor of production (Confartigianto Vicenza, 2002-2010).

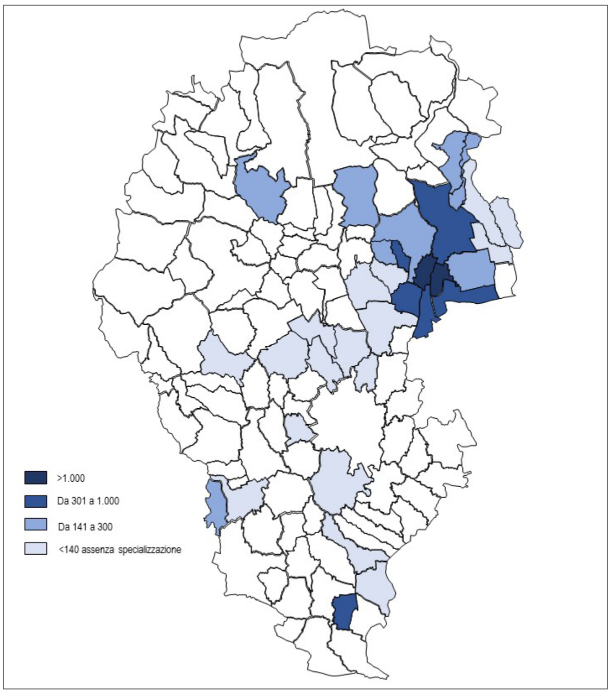

Figure 1 – Specializatioт Index. Province of Vicenza (Area of Bassano-Nove in dark blue)
Source: Elaborazione Ufficio Studi Confartigianato Vicenza su dati Unioncamere-Infocamere, 2017

This is all the more striking that in the period 2003-2018 the sector lost 42 percent of existing firms (figure 2).

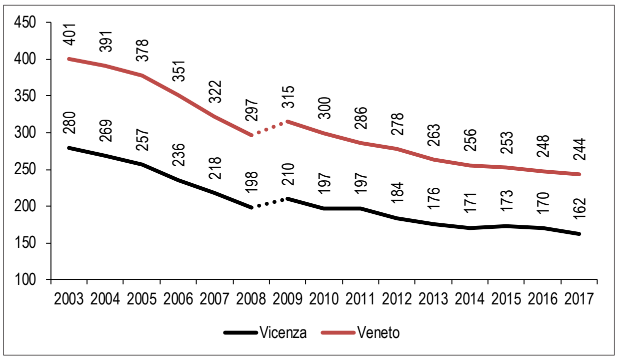

Figure 2 – Firms operating in the ceramic sector (red line Veneto region, dark line Vicenza province)
Source: Elaborazione Ufficio Studi Confartigianato Vicenza su dati Unioncamere-Infocamere, 2017

The dependent employment balance (recruitment – cessation of employment) has been negative for all the period considered (2000-2018), with very sharp diminution in 2001-02 (-55%), in 2008-09 (-75) and in 2015 (-50%). This, in turn, had negative effects on manpower offer, as the sector lost attractiveness of perspective young artisans, and workers.

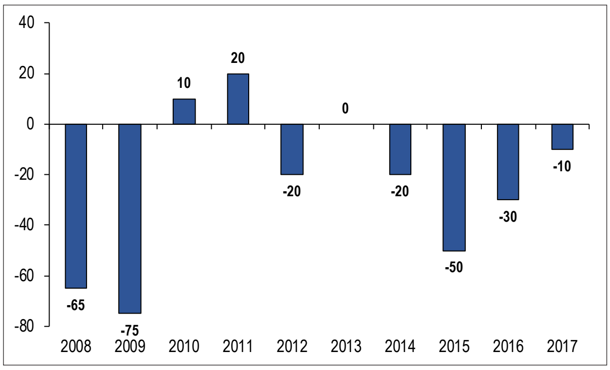

Figure 3 – Employment Balance (Artistic Ceramic Sector Nove-Bassano)
Source: Confartigianato Vicenza, Elaborazione Ufficio Studi Confartigianato Vicenza su dati Unioncamere-Infocamere, 2017

However, in crisis the sector remains strongly export oriented, almost 90 percent of its production being sold outside Italy (figure 4). The first export markets are the traditional ones – Western Europe and the US. The Far East, and emerging countries as Russia, Ukraine and Kazakhstan play also a relevant role. Notwithstanding a temporary diminutions of exports to the Russian Federation in the years 2014-16 mainly due to political reasons (Barison, 2018), East Europe and Central Asia are emerging as primary markets, reaching almost 30 per cent of the sectors exports in 2017 (Tich, 2018).

In 2017 the United States still remained the first market, with 6.3 million euros and the 15,5 per cent exports, followed by Germany and France. The picture mirrors the traditional export configuration of the sector, as it emerged from the 1950s onwards. A closer analysis reveals however structural changes.

Comparison of figures 4 and 5 reveals in fact that America and Western Europe are losing positions, whereas Asia is nowadays the fastest growing market for ceramic products. Russia, in particular increased its share by 57 per cent in 2016-17 largely compensating the diminution of the years 2014-15. Equally interesting is the fast growth of China, that increased its share by 76 per cent in the decade 2007-17, playing the double role of concurrent, and buyer. Evidence shows that firms working with Asian, including Russian, clients have more chances of development than those sticking in the sector's traditional markets (Barison, 2018).

Paese		Export 2007	Export 2016	Export 2017	incid. % vs world	var. % 2017 vs 2016	var. % 2017 vs 2007
1	United States	9.558.684	6.074.506	6.303.049	15,5	3,8	-34,1
2	Germany	7.773.793	6.404.262	5.956.686	14,7	-7	-23,4
3	France	3.312.927	4.078.767	4.416.823	10,9	8,3	33,3
4	Austria	2.127.839	2.439.894	2.045.557	5	-16,2	-3,9
5	UK	2.112.098	1.695.995	1.715.132	4,2	1,1	-18,8
6	Russian Fed	1.906.127	1.085.518	1.704.138	4,2	57	-10,6
7	South Corea	157.264	1.081.797	1.515.742	3,7	40,1	863,8
8	Spain	1.805.545	1.490.116	1.487.763	3,7	-0,2	-17,6
9	Poland	283.781	1.346.715	1.385.639	3,4	2,9	388,3
10	Netherlands	1.118.449	798.120	953.841	2,3	19,5	-14,7
11	Arab Emirate	496.770	729.514	875.554	2,2	20	76,2
12	China	440.602	755.047	774.811	1,9	2,6	75,9
13	Qatar	0	590.891	724.438	1,8	22,6	n.d.
14	Croatia	283.649	838.732	603.189	1,5	-28,1	112,7
15	Danmark	618.203	609.596	585.112	1,4	-4	-5,4
First 15 markets		**31.995.731**	**30.019.470**	**31.047.474**	**76,4**	**3,4**	**-3**
Other Markets		**8.518.302**	**9.468.309**	**9.579.202**	**23,6**	**1,2**	**12,5**
UE 28		**21.865.231**	**22.699.676**	**22.202.117**	**54,6**	**-2,2**	**1,5**
Extra UE 28		**18.648.802**	**16.788.103**	**18.424.559**	**45,4**	**9,7**	**-1,2**
World		**40.514.033**	**39.487.779**	**40.626.676**	**100**	**2,9**	**0,3**
Source: Ufficio Studi Confartigianato Vicenza and Author's elaborations							

Figure 4 – Exports from the Province of Vicenza of ceramic products (2016 and 2017)
Source: Ufficio Studi Confartigianato Vicenza and author's elaborations

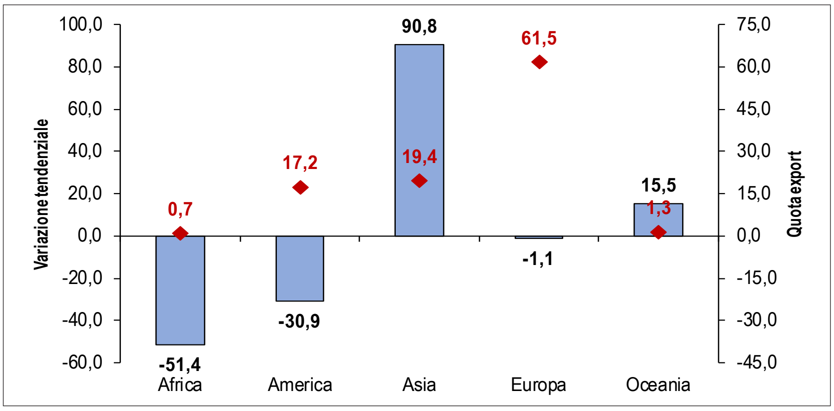

Figure 5 – Dynamics and Exports Shares of the Ceramic Sector of Nove Bassano (Vicenza Province). Variation 2017-2007 (blue columns) and export share (red numbers)
Source: Confartigianato Vicenza, Elaborazione Ufficio Studi Confartigianato Vicenza su dati Unioncamere-Infocamere, 2017

Statistical data presents an overall picture of a sector living a long lasting crisis, and bearing high costs in terms of number of firms in activity, employees, and turn-over. The reasons of such dismantling trends have been identified within three broad categories (figure 6).

First of all external transformation of reference export markets (the US and Western Europe) from the mid-1980s onwards negatively influenced the sector's trends. Traditional ceramics, in particular, lost their attractiveness as interior, and garden decoration, as consumers' tastes moved towards simple, sometimes minimalist styles. The European common currency also influenced negatively the sector's performance, eliminating the advantage granted by "competitive devaluation" of the former Italian currency (Chinn, 2006). Finally Chinese concurrence in the medium and low market segments widely jeopardized exports, above all in the United States, as buyers, purchasing big quantities of ceramic objects for the large retailers massively turned to cheaper Chinese goods.

Along with such exogenous elements, inner weaknesses, as the district's fragmentation and concurrence, the one client – one market policy of many firms, traditionalism in design and production, and weak financial structure of many handicrafts, implying over-reliance on debt also plaid a negative role. The lack of technological innovation, and the strong reliance on manual work, strongly reduced competitiveness, incorporating in the products costs, as namely hand-made decorations, that were no more valued by consumers.

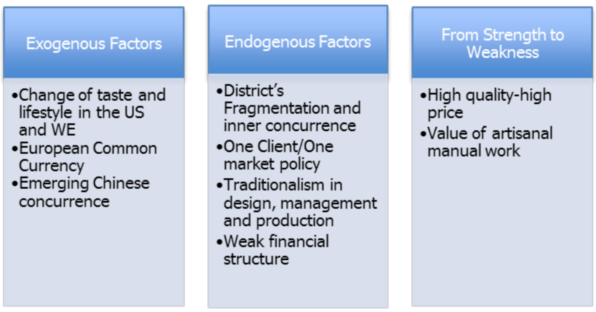

Figure 6 – Categories of influence factors on ceramic sector
Source: Confartigianato Vicenza, Elaborazione Ufficio Studi Confartigianato Vicenza su dati Unioncamere-Infocamere, 2017 and Author's Elaborations

The enduring crisis mirrors, therefore, profound changes in the world economy, and sector's inner structural limits, both elements trapping most firms within a vicious circle of decreasing turn over, market shares, financial resources, and medium term perspective.

Case Study

Within this otherwise dismantling picture, however, are to be found examples of successful businesses, that counteracted market's trends, developing alternative strategies that allowed transforming weaknesses into strengths. An example of the ability of changing at its own advantage the "rules of the game", exploiting the opportunities offered both by globalization, and technological progress is offered by Ceramiche Lorenzon, a small family run business operating essentially in niches of the Russian, and Central Asian markets.

The firm was created in 1971 by Gianni Lorenzon and his sister Loretta, both ceramic artisans, and it is still run by their heir-children. The founders, already working in the sector, aimed to exploit the fast growing demand for decorative ceramic items above all of the American market. The firm started therefore serving namely that market with high quality, competitive products, that, however, showed little differentiation from competitors. Besides marketing strategy was quite conservative, relying mainly on local agents, and poorly supporting brand promotion.

Until the early 2000s we worked essentially for the American market, that bought more than 80 per cent of our productions. We had contacts with local agents, so we did not have to bother about promotion. We produced quite a vast range of ceramic items for interior and exterior decoration. Business was going very well, and had fair returns. Then, suddenly, the market stopped. They stopped ordering. I still don't know exactly the reasons. As we had no contacts with the final clients it's very difficult to understand. There was the coincidence of the twin towers attacks. There was the emerging Chinese production in medium quality ceramics. In any case from one year to the other sells dropped. It was a shock and we understood that we had to react changing dramatically production and marketing processes (Lorenzon, 2018).

In fact, the firm's strategy radically changed. The transformation coincided with the generational succession, the children of the founders obtaining full management responsibility. It also mirrored the deep transformation in world economic and political contexts bought about by globalization. Reacting to the decline of the American market, tightly linked with the emerging Chinese concurrence, as well as with taste and cultural changes, the management looked for new opportunities, spotting in Eastern Europe, and Central Asia as emerging areas. The former Soviet republics, in particular, offered niches for high quality ceramics items. Cultural factors, the relatively large number of rich potential clients, and different approaches to interior decoration created the prerequisite for the firm successful presence in the area.

Rapid transformation was vital. We had the chance that all this coincided with a generational succession in our firm, our parents having given to us, the new generation, full responsibility. That eased very much things, liberating new energies and views. In particular, we felt that the former Soviet republic offered a very perspective market. There were a set of very clear reasons for that. First of all, there were quite numerous very rich potential clients. People who had earned fortunes in very short time, and were ready to spend money for decorating interiors, and villas, relying on designers and architects. That was, and is, true in Russia as in almost all former Soviet republics. Then they had a particular taste, that was quite far from the "minimalism" that was emerging in western countries at that time. Then they had houses and apartments that could host our products, requiring large spaces. The point was how to get into the market. The idea was to get closer to the client, to build contacts with designers, and architects. And also with the "final users" (Lorenzon, 2018).

Starting from these premises, the firm developed an ambitious marketing strategy. It started participating in fairs, and special events, like, among others, the Euroluce Fair in Milan, the Moscow Fair of 2018, or the Interior Mebel Fair in Kiev. This allowed not only to present new collections, but also to come to contacts with architects and designers. Show rooms, and a single brand stores, like that opened in 2018 in Teheran, was a second step forward. All these measures allowed to build tighter links with the clients, both professionals and final users, which, in turned, developed into an ever greater products' personalization reaching, in the last years, characters of "tailored production".

We used the financial resources accumulated in the past years, when we were working in the American market, to build up our presence in the CIS area. And, though difficult, it paid off. Now we are quite present in the region, and sells are growing every year. We have so close contacts with designers and architects that we can create production almost tailored on the clients' needs. This is the other relevant transformation of our firm. We don't offer standard products, but tailored ones. We are artisans in the real sense of the word, though our firm uses very advanced technology. Tailoring the product means that we don't really sell ceramics items, but an idea of how to decorate interiors, and gardens. We sell a life style. The work that we are doing now is to publicize namely a life style, associating the brand Lorenzon with a certain idea of luxury. So clients do not by just a chandelier. They buy a particular one that has features that will be recognized as unique. This is at once brand, marketing and production policy (Lorenzon, 2018).

Collections were deeply adapted to the new markets, mirroring, for example, the taste big, luxurious and exotic animals like lions and tigers, or for extremely elaborated chandeliers, fountains and mirrors of the Central Asian world. This goal was reached innovating production, and exploiting up to date techniques within traditional, handicraft processes. Nowadays the firm's presence in Central Asian markets is consolidated, and the area absorb the bulk of firm's production, insuring medium term, continuous development of sales and turn-over.

Conclusion

The sector's analysis and the proposed case study demonstrate that success can be reached even within a declining sector and by medium and small handicraft firms, provided that they succeed in innovating marketing and production strategies to concentrate in market niches, where the propose quality plays a more relevant role than price, tastes are consistent with the firm's offer, and close contacts with clients allows to "tailor" products in a way that no competitor can make, selling, more than just a product, a service, a relationship, and a life-style.

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