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INDUSTRIAL DISTRICTS OF MARCHE REGION: RISE AND DECLINE

DISTRETTI INDUSTRIALI DELLA REGIONE MARCHE: ASCESA E DECLINO

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ABSTRACT

The contribution aims to analyze the birth and rise of the Marche industrial districts, the causes that led to their decline and, finally, the possible solutions that might allow them to bounce back within the international scenario.

The first chapter analyzes the main characteristics of the Italian districts, the Italian model and the growth and difficulties of the districts. Italy, unlike the other states, stands out for the high number of active companies. The difficulty or growth of districts depends on the strategies adopted and the quality of governance. The districts that perform significantly better are affected by synergies with research centers and universities, efficient governance, investment in innovation, autonomy of subcontractors and numerous companies that coordinate different supply chains. There are several transformations taking place in the Italian districts that involve businesses, international openness, and the differentiation of strategies.

The second chapter analyzes the historical profiles of the Marche industrial districts, their development but also their difficulties. As far as development is concerned, we analyze the years that favored the growth of small and micro enterprises increasingly specialized in the single production phases and the various sectors of greater importance in the region. As for the difficulties, the causes that led to the crisis of the districts are analyzed. Thus, from the inadequate

growth of competitiveness to the stagnation of internal consumption, from the lack of marketing and communication skills to scarce financial resources, from organizational / managerial problems to strong competition.

The third chapter analyzes the main causes that led to the crisis in the Marche industrial districts and the recent initiatives promoted by the region to favor their recovery. In detail, among the causes that determined the decline there is the lack of cooperation between the various districts, the low investments in product and process innovation, the inability to control the outlet markets, the lack of attention to changes in demand, the competition from some Asian and Eastern European productions, the limited financial management skills, the lack of specialized professionalism, the scarce support of the local authorities. However, some districts have been able to recover certain levels of competitiveness thanks to the joint effort in the application of product and process innovations, cooperation with other companies, planned relocations, collaboration with social partners, autonomy of subcontractors, marketing and training strategies of personnel, synergies with universities and research centers, in the presence of various leading companies that coordinate different supply chains. The fourth and last chapter shows the trend for the first half and second half of 2021, analyzing the situation of the Marche industrial districts and making a relationship between the Marche districts and the other Italian districts and between the Marche districts and those of the abroad.

In addition, the solutions and main proposals are analyzed to encourage the recovery of the industrial districts of the Marche region. One of the solutions aimed at relaunching the Marche production systems is to promote the internationalization of industrial districts in order to recover lost ground to facilitate the entry and strengthen the presence of the Marche production system of excellence on world markets. It is precisely internationalization, that is the expansion of industrial districts outside their own national market, that is lacking in the industrial districts of the Marche region. There are several entities that operate and support companies during the internationalization process; among the main ones are: the Agency for the promotion abroad and the internationalization of Italian enterprises, the Regions, Regional branches for the internationalization of enterprises (SPRINT), the Italian Society for enterprises abroad (SIMEST), the foreign trade insurance services (SACE), the Financial Law for entrepreneurs of the North-East (FINEST). Industrial districts can internationalize through:

- the representative office: a modality that involves lower set-up costs and from which fewer statutory obligations arise; in fact, the registration of the local unit in the Chamber of Commerce of the foreign state of settlement is sufficient;
- permanent establishment: while the representative office represents one of the possibilities of operating abroad without a permanent presence on the

part of the company that wants to internationalize, the permanent establishment instead constitutes a permanent presence abroad;

- the company: possibility of setting up a subsidiary company;
- the joint venture agreement which concerns a collaboration between two or more companies with the aim of setting up a new company in a sector of common interest or for the joint performance of some business activity.

To internationalize the industrial districts, the Marche region should increase the size of the companies but also the entrepreneurial factor. Unfortunately, there are several industrial districts that prefer to avoid internationalization. Notably, for industrial districts, the lesser importance of production internationalization compared to that of a commercial nature can be interpreted in different ways:

- organizing production in a foreign country is usually much more expensive than simply selling it;
- for many small and medium-sized district businesses, the fixed costs required to invest abroad can be a difficult obstacle to overcome;
- in the absence of a movement of the entire production chain, which may prove difficult to achieve, the incentive to travel abroad may be limited for a district company, typically linked to the territory of origin.

To tell the truth, as far as investments in internationalization are concerned, the Marche region is on the right track to date as it has already implemented various development processes, while digitization is still being discovered and under development.

CHAPTER ONE

BIRTH AND DEVELOPMENT: THE BEGINNINGS OF THE INDUSTRIAL DISTRICTS

1.1 DEFINITION AND CHARACTERISTICS OF THE INDUSTRIAL DISTRICTS

This chapter analyzes the main characteristics of the Italian districts, the Italian model and the growth and difficulties of the districts.

Italy, unlike other European states, stands out for the high number of active companies. The districts that perform clearly better are affected by synergies with research centers and universities, efficient governance, investment in innovation, autonomy of subcontractors and numerous companies that coordinate different supply chains. The difficulty or growth of districts of small industrial entereprises depends on the strategies adopted and the quality of governance.

The first who addressed the issue of industrial districts was the English economist Alfred Marshall, in the second half of the 19th century, to describe the textile industries of Lancashire and Sheffield.

He defined an industrial district as a socioeconomic entity constituted from a group of enterprises, generally making part of a same productive field, localized in a circumscribed local area, between which there is collaboration but also competition (Marshall, 1890).

Marshall, through specific analyses carried out in the textile industries of the South Yorkshire area, understood that the presence of so many enterprises operating in the same field can nourish, develop and strengthen local industry through the creation of the so-called "industrial atmosphere".

Afterwards, he also understood how the local dimension was crucial to the industrial organization and for the development of the economy.

As a result, from the agglomeration of SMEs[1] an economic space was created, characterized by the diffusion of peculiar technical skills and entrepreneurial vocations but also by the presence of a complex network of informal rules that regulated the relationships between the entrepreneurs and integrated the legislative provisions.

An important feature of the “Marshallian district” is represented by the presence of the “external economies”, born out of the mutual collaboration between producers, clients and suppliers which have contributed to to the formation of agglomerations of SMEs.

Therefore, according to Marshall the industrial districts represent one modality of production organization that differs from the classic organization of the great enterprise, which had a pivotal role during the:

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[1] Abbrevation for Small and Medium-Sized Enterprises.

- Fordist period, characterized by great productive amounts, the concentration in one single physical place of all the operations and an elevated vertical integration;
- Taylorist period, which features some factors: on the one hand the processing cycle undergoes a rationalization with the introduction of the assembly line, on the other the power relations between workers and employer undergo a radical transformation.

Furthermore, Marshall added that the industrial district, unlike the great enterprise, can have single-sector overtones with poor tertiary functions, thus, can be composed also from more urban centers activating vertical and horizontal affiliations.

The studies of Marshall on the industrial districts were consequently resumed by the Florentine economist Giacomo Becattini.

Giacomo Becattini (2000) described them as communities of company and people living and operating within semi-peripheral local territorial contexts.

With this expression, the author emphasizes two important elements that each industrial district must retain to be regarded as such the importance of technical cooperation between firms that occurs in district-sector and the relevance of socio-context roots of the enterprises, mostly small and medium-sized.

Therefore, it is evident that Beccatini uphold the idea that the local dimension can effectively generate added value and economic development as the economy is deeply rooted in the local community characterized by social cohesion.

To give an idea of the importance of the social factor, vital for Beccatini to the evolution of the industrial district, suffice it to say that, even today, the social capital is considered an economic factor of production at the economic level[2].

Over the years, various definitions of the concept of "industrial district" have been provided by renowned scholars.

However, the main aspect that all the districts share is the fact that they were born not only out of favorable economic conditions and the availability of certain production factors, but also from the disparate historical and cultural contexts that gave them peculiar connotations.

Hence, although the industrial district escapes to a univocal and universal definition, it is possible to outline its main characteristics.

The industrial district constitutes a reality characterized by a whole of common values and a spirit of economic initiative that affects the relations between the various economic actors.

The inner organization of the production is concretized through enterprises of small and medium dimensions that often correspond to the single phases of the

[2] For a further exploration of the topic see Orazi F., Dai distretti ai post-distretti: il caso Medioadriatico, Fondazione Aristide Merloni, dicembre 2008.

manufacturing process connected between them by means of informative and cooperating networks. The new business configurations (for instance business networks) take on a meaning that goes beyond that of a substitute factor of the large size: they are very stable and organized thanks to the form of collaboration that is created. The requirements that attribute dynamism to the districts are the ability to experimentation, creativity and practical talent, handicraft attitude, technical skill and ability of innovation, namely entrepreneurship (Carboni, 2009).

The industrial district often represents an opportunity for small and medium-sized enterprises to manage their production processes efficiently, just like it occurs within one single large company (Dimonte, 2019).

When it comes to industrial districts, reference is already made to the Second World War.

In fact, since the Second World War, production has developed more in those areas where there were companies linked by collaboration relationships and specialized in the various stages of the production process.

Thanks to the development of the 1950s which required a wide range of products for both people and the home, the production districts spread widely[3]. The

[3] Mondopmi, Distretti industriali: cosa sono e quali sono i più importanti in Italia?, in www.mondopmi.com, 24 luglio 2019.

diffusion continued in the 60s and 70s in which various concentrations of companies were born[4].

The industrial development model, in the 1970s, found the ideal conditions for its affirmation, in fact in that period the conditions for growth in market demand failed and companies find it difficult to maintain growth strategies.

Furthermore, on the one hand, the companies started productive decentralization actions and, on the other hand, exploited the potential of the division of labor between companies in the same sector.

Subsequently, and precisely in the 1980s, several companies started a process of internationalization, managing to enter world markets.

Today, the legislation, providing the definition of industrial district, takes up the characteristics recognized by Alfred Marshall[5].

Notably, Marshall defined the industrial district as a socio-economic entity consisting of a set of businesses.

These companies are generally part of the same production sector, located in a limited area, among which there is collaboration but also competition.

Marshall spoke of an industrial district, such as a socio-economic reality.

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[4] For a further exploration of the topic see Quintieri B., I distretti industriali dal locale al globale, Rubbettino, 2006.

[5] Carlini G., Distretti industriali e teorie economiche di Alfred Marshall, www.giovannicarlini.com.

The legislator, putting into practice what Marshall said, refers to industrial districts as those local territorial areas characterized by a high concentration of small businesses.

It refers to the relationship between the presence of enterprises and the resident population and to the productive specialization of the enterprises.

The development of industrial districts has mainly occurred due to various factors, such as the rapid diffusion of know-how (Carlini, 2020); the organizational structures of the districts (in fact, the reticular nature of the districts means that this arises as a response to the competitive context); human labor intensive production processes; and the scarce economies of scale.

In industrial districts, the organization of the production process records an indifferent breakdown between different companies, each of them can achieve the advantages of specialization.

Relations between companies arise from collaborations between subjects operating at different levels of the production system and from competition between those carrying out the same activity.

This only encourages collaboration and gives the system a high degree of dynamism.

Instead, the advantages brought by the districts are: geographical proximity capable of guaranteeing the circulation of goods and human resources in the territory, the exchange of knowledge, innovation in the district and the creation of relationships from which production benefits.

Of course, there are also disadvantages. Among these is the fact that the district may be too inward-oriented or the district may be unable to adapt to market changes or to respond to market needs where demand changes faster.

Today the competitiveness of the districts is very widespread, in fact companies are now able, at the same time, to govern several variables, such as controlling the value chain or listening to the market.

Quality must be calibrated and must derive from the brand, from the design, from the ability to design new shapes and objects, from the ability to guarantee and facilitate functions, from the ability to transform a product from standardized to customized.

Historically, the Italian industrial districts are the strengths of the production system. Today the districts have a real organizational model for both Made in Italy and industrial production.

Of all the countries, Italy is certainly not the best from the point of view of investments, due to political instability, the poor efficiency of the Public Administration but also due to the tax and contribution burden.

Despite this, the industrial districts manage to relaunch the attractiveness of Italy as they are useful to Italian small and medium-sized enterprises to support the investments they need for the future.

To conclude on the Italian production districts, three fundamental points must be considered, such as:

- the effective attractiveness of Italian industrial districts for foreign investments;
- companies enhance the districts as a potential place for productive investment;
- the importance that the Italian industrial districts have on the attractiveness of the country.

1.2 THE ITALIAN MODEL

Italy, unlike the other states, stands out for the high number of active companies.

In fact, Italian SMEs are the expression of an industrial development that highlights the capacity of the economic and social forces of a given territory[6].

The Italian industrial districts are homogeneous local production systems characterized by small and medium-sized industrial enterprises and high production specialization.

Initially, the phenomenon of industrial districts spread in the north-east of Italy such as Veneto and in central-southern Italy such as Marche, Abruzzo, Puglia.

For the first time, the legal recognition of the districts took place with Law 317/91 which provided for the involvement of the regions in identifying the districts, in financing and supporting the districts through industrial development consortia.

In fact, it is up to the Regions to identify the industrial districts present in their territory and, once identified, the Regions approve the financing.

Law 317/91 aims to promote the development and competitiveness of small businesses, also set up in a cooperative form, with particular regard to the diffusion and development of new technologies but also to the development and activity of consortia and consortium companies between small businesses as well

[6] For a further exploration of the topic see Bonapace L., Le competenze distintive nei distretti industriali italiani, 2015.

as consortia, consortium companies and collective credit guarantee cooperatives, made up of small industrial, artisan, commercial, tourism and service companies.

The law in question defines:

- small industrial enterprise that does not exceed 200 employees and Lire 20 billion of invested capital, net of amortization and monetary revaluations;
- small commercial enterprise, small tourist enterprise and small service enterprise, even in the advanced tertiary sector, the one with no more than 75 employees and 7.5 billion lire of invested capital, net of depreciation and monetary revaluations.

Unlike production districts, business networks are "*forms of coordination of a contractual nature between businesses, especially small and medium-sized companies, which want to increase their strength on the market without having to merge or merge under the control of a single entity*"[7].

For several years, the Parliament has intervened on business networks in order to increase the competitiveness of the businesses themselves and to overcome the limit that derives from the Italian productive fabric made up of small businesses.

As mentioned, up to Law 317/97, the industrial districts had no institutional identity.

[7] Distretti, reti e contratti di rete, in https://leg16.camera.it.

Furthermore, this law *"did not propose to the regions a clear direction in procedural terms for the active management of financial resources for the districts.*

From this point of view, there was a lack of univocal references from the beginning for a subsequent development of effective governance of the districts themselves"[8].

The first interventions that recognized the industrial districts are the CIPE Resolution of 21/03/97, according to which industrial districts can act as promoters for program contracts; the Law 266/97 (the so-called Bersani Law), according to which a contribution was recognized for the IT and telecommunications innovation of the districts.

Likewise, this law provided that for the non-profit industrial development consortia set up by the regions, capital contributions for the performance of innovation and technological development goods and services; the Law 140/1999, which simplifies the criteria for identifying industrial districts.

In particular, *"the law replaced the previous definition of local labor systems with that of local production systems. The same law then gave the task to the regions to take action to finance innovative projects proposed by private individuals belonging to the industrial districts"*[9].

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[8] Distretti, reti e contratti di rete, in https://leg16.camera.it.

[9] Palmi P., Le fabbriche della creatività, 2013, Milano.

After this law, the Regions have tried to define common criteria for the identification of industrial districts and local production systems.

In the Coordination of 21 October 1999, the Regions agreed to maintain the specific characteristics of the Italian industrial districts, to consider the qualitative indicators for the productive realities of the South and to point out that the local labor systems are not exhaustive as they are territorial areas.

As regards the districts, the issue of delegation to the Regions of the management of industrial policy has been modified by Legislative Decree 112/98 which delegates to the Regions the functions relating to the granting of contributions, incentives and benefits.

In addition, it was also amended by Legislative Decree 79/99, which recognized companies to join together to benefit from lower energy costs.

The 2006 Budget Law intervened on the production districts providing for the adoption of a decree by the Minister of the Economy and Finance.

Reference is made to this decree for the definition of the characteristics and methods of identifying the production districts, which can be qualified as free aggregations of enterprises articulated at a functional and territorial level aimed at increasing the development of the reference areas.

Thanks to this provision, territorial districts and functional districts are born.

The territorial ones are characterized by the common belonging of the companies belonging to the same productive sector and to the same territorial area.

The functional ones are free aggregations of companies that cooperate in a mutual business logic.

Then, there are the technological districts destined to strengthen technologically advanced sectors, such as the “Torino Wireless” district for ICT (Information and Communication Technology).

The technological districts aim to create research and innovation centers in numerous areas of the country, specialized by technology sector, with the ambition of becoming centers of excellence also at an international level.

These are initiatives in the start-up phase, the peculiar aspect of which is found in the fact that the technological districts aim to reproduce in the field of technological innovation the advantages, spatial and network relationships, already successfully tested in industrial districts.

The technological districts are mainly located in Veneto, Lazio, Lombardy, Sicily, Emilia Romagna, Liguria, Puglia, Calabria.

To date in Italy there are more than two hundred manufacturing districts of which more than half work with Made in Italy in sectors such as fashion, agri-food and furniture[10].

Fashion: as for clothing, the main districts of the field are the cashmere district of Perugia, the silk factory of Como, the sportsystem district of Montebelluna.

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[10] For a further exploration of the topic see Becattini G., Distretti industriali e made in Italy le basi socioculturali del nostro sviluppo economico, 1998.

As for the production of jewelery and accessories, the main ones are the goldsmith districts of Vicenza, Arezzo and Valenza Po, the Valdarno district and the tanning district of Solofra.

As for the mechanical sector, the main ones are the automobile district of Turin or the Apulian aerospace district, that of the Motor Valley in Emilia Romagna, the rubber district in Lombardy, the Piedmontese taps and fittings district.

Agri-food: among the main ones are the wine-growing districts of Piedmont and Veneto, but the Prosciutto di Parma and San Daniele in Friuli district, the agri-food district of Nocera and Gragnano in Campania and that of Fara San Martino in Abruzzo.

Furniture: among the most important are the Sardinian cork district, that of Murano glass, of the ceramics of Civita Castellana.

Most of the industrial districts in Italy are located in the North, in particular in the North-west, there are at least 40 districts active in various sectors.

Particularly in Piedmont, there are several mechanical companies, thanks to FIAT but there are also[11]: agri-food districts (La Morra), chocolate districts (Turin), wine districts (Canelli and Santo Stefano Belbo), cold districts (Casale Monferrato) and districts of taps (Cusio-Valsesia).

[11] Mondopmi, Distretti industriali: cosa sono e quali sono i più importanti in Italia?, cit., 24 luglio 2019.

In Liguria, however, there are districts of shipbuilding (La Spezia), districts of artistic craftsmanship (Savona), districts of stone processing (Tigullio) and horticultural districts of the West.

In Lombardy there are districts of cosmetics, Lombard cereal districts, rubber districts (Varese) and horticultural districts (Canneto sull'Oglio).

In the North East there is about 27% of the total of national districts.

The most famous are[12] district of the Brenta shoe, Vicenza goldsmith district, the eyewear district of Belluno and prosecco district (Treviso).

Notably, in Friuli Venezia Giulia there is the district of the chair of Manzano, the knife district of Maniago, agri-food district of San Daniele ham and district of Digital Technologies DITEDI (Udine).

In Central Italy there are about 30 districts. In Emilia Romagna are famous district of ceramics (Faenza), district of the tiles (Sassuolo) and footwear district (San Mauro Pascoli).

The industrial landscape of Marche is also quite interesting because the region features a multitude of industrial districts such as: furniture districts (Pesaro), districts of musical instruments (Castelfidardo), Ancona’s multisectoral district, which includes renowned firms such as Guzzini, Clementoni, Rainbow, Tontarelli, Innoliving etc. which are keeping up the good industrial reputation of

[12] Mondopmi, Distretti industriali: cosa sono e quali sono i più importanti in Italia?, cit., 24 luglio 2019.

the region internationally. Also noteworthy within Marche are: the hat district (Montappone), agro-industrial districts (San Benedetto del Tronto), multi-sectoral districts (Civitanova Marche), footwear districts (Fermo and Macerata) and districts of household appliances (Fabriano).

In Tuscany are famous the marble district (Carrara) and leather industry district (Florence).

Finally, there are 10,000 businesses in the South. In particular, in Campania there are tanning district (Solofra), agri-food district of pasta (Gragnano) and agri-food district of the tomato (San Marzano).

In Basilicata we remember corsetry district (Lavello) and underwear manufacturing district.

In Puglia, on the other hand, there are the districts that interest specialization, innovation and aerospace technology.

In Italy in the first half of the year there was a leap of 27.6% in exports, compared to the same period last year.

In the coming months, *"according to the analysis of Intesa Sanpaolo's Studies and Research Department, a constant growth rate is expected with 2021 which will close with new record levels. In the Italian industrial districts, the comparison with 2019 shows an increase of 0.7% (equal to 438 million euros)* *and the achievement of new record levels of 64.6 billion euros. The recovery concerns all the territories of the country"*[13].

At a territorial level, exports from the North-East districts stand out (+ 4.2% the change compared to the first half of 2019). It is highlighted in Friuli-Venezia Giulia for dynamics + 15.6% and in Emilia-Romagna and Veneto for the increase in export values +443.7 million euro and +324.9 million respectively.

It is a reality in which innovation, quality research and an international vocation are the spearheads of Italian small and medium-sized enterprises.

Districts are one of the most dynamic components and therefore we can say that they push growth[14].

Among the most dynamic sectors in Italy are household appliances (+ 29% the change compared to the first half of 2019); metallurgy (+ 22.2%); agri-food (+ 14.9%); districts specialized in furniture (+ 8.2%); districts specialized in construction products and materials (+ 6.7%).

As can be seen, after the war Italy underwent a process of industrialization, becoming more and more an economic system with territorial and structural diversity and characterized by numerous localized specializations.

Giacomo Becattini (2000, 2007) and Giorgio Fuà (1983) *"were those who strongly opposed the traditional vision of industrial development that starts from*

[13] I distretti industriali spingono la ripresa, in www.lastampa.it, 1° ottobre 2021.
[14] I distretti industriali spingono la ripresa, in www.lastampa.it, 1° ottobre 2021.

the center and branches off towards the peripheries and which tends to deny or otherwise limit the 'economic importance of the industrial districts and of third Italy, made up of local networks of thousands of small and medium-sized enterprises, sectorally specialized and able to ensure specific types of finished or semi-finished products" (Schilirò, 2008).

According to Marco Fortis and Alberto Quadrio Curzio (2006), the Italian industrial model based on small and medium-sized enterprises based on manufacturing specializations, innovation and internationalization.

Over time, the model in question has proven to constitute a paradigm of competitiveness. Consequently, it is wrong to seek the cause of some (real) structural weaknesses of the Italian system in industrial districts and traditional specializations (Schilirò, 2008).

1.3 INDUSTRIAL DISTRICTS IN ITALY: BETWEEN GROWTH AND DIFFICULTY

Obviously, not all districts have the same performance; there are districts in difficulty but also districts in growth. This difficulty or growth depends on the strategies adopted and the quality of governance.

Districts that perform significantly better are affected by synergies with research centers and universities, efficient governance, investment in innovation, autonomy of subcontractors, numerous companies that coordinate different supply chains.

Based on the evolution, districts can be divided into dynamic districts, mature districts and vulnerable districts and virtual districts (Ricciardi, 2013).

The dynamic ones are those districts that, being equipped with efficient governance, have strategies capable of developing and increasing income-related performance.

Companies, in fact, collaborate with each other and are characterized by the interdependence of production cycles that guarantee knowledge. Mature districts are those neighborhoods linked to the place where they are located and, unlike the previous ones, do not have an efficient governance.

Also, companies spontaneously collaborate with each other and don't pay much attention to marketing and product innovation and marketing.

Vulnerable districts are those districts that have weak roots in the territory, do not have an efficient governance and do not collaborate with each other, on the contrary they find themselves in conditions of competition.

They have completely unstable performances as they do not invest in marketing and innovation. Virtual districts are those districts that collaborate with each other through business networks. Thanks to the networks, the problem of the size of the Italian economic system is overcome. The lead company, in fact, not being able to do without the partners, first intervenes through employment contracts and subsequently transforms the network into a group of companies.

The network, in addition to contributing positively to the competitiveness of individual partner companies, can share a project for a specific product and guarantee updates and knowledge and forms of collaboration.

Examples of collaboration in the districts are university research centers, internationalization consortia, purchasing consortia, export consortia, innovation experimentation consortia. For the districts, the moment in which collaborative networks expand is certainly an advantage.

In fact, when the view widens, an important growth objective could be born. As for the development strategies of the district, it is necessary to consider commercial and productive promotion (in particular, we try to promote a product through participation in events, fairs, image exhibitions both nationally and internationally);

brand promotion (it is aimed at showing customers the value of the brand, the material used for production); productive culture and social identity (it is aimed at the development and conservation of the artistic and cultural heritage); local knowledge (its objective is the collaboration between training companies and young people to give the latter training to the district system); environmental quality (its objective is to give the district general coordination and an organizational definition capable of guaranteeing adequate and adequate operations) and research and innovation (it is aimed at enhancing the products).

In this regard, it is recalled that the Italian State, for investments in research and development activities, technological innovation and other innovative activities (design and aesthetic conception) carried out from 2020 to 2022, has granted companies a tax credit[15].

Specifically, businesses resident in Italy are concerned, including permanent establishments of non-resident entities, regardless of their legal form, economic sector, size and tax regime for determining the company's income, which make investments in the aforementioned activities.

Only companies in voluntary liquidation, bankruptcy, compulsory administrative liquidation, arrangement with creditors without business continuity, other insolvency proceedings or which have proceedings underway for the declaration of one of these situations are excluded.

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[15] Eutekne banca dati, Il credito d'imposta R&S, agg. 2021.

Companies receiving disqualification sanctions are also excluded. The research and development activities for which the credit in question may be requested are fundamental research (it includes experimental or theoretical work to acquire new knowledge in the scientific or technological field, through the analysis of physical and natural phenomena); industrial research (i.e. the original works undertaken to identify possible uses or applications of new knowledge deriving from a fundamental research activity or to find new solutions to achieve a predetermined practical goal); experimental development (i.e. the systematic work carried out to acquire further knowledge and collect the technical information necessary to create new products or production processes, significantly improve existing ones, making changes that have a novel character and that are not the result of a simple use of the state of the art in the reference sector).

The technological innovation activities for which the credit in question can be requested are those aimed at creating or introducing new or significantly improved products or processes (production and distribution and logistics) compared to those already created or applied by the company. The products must be differentiated from those already made by the company, for example by technical features, components, materials, embedded software, ease of use and other elements concerning performance and functionality.

The processes must involve significant changes in the technologies, plants, machinery and equipment, in the software, in the efficiency of the resources used, in the reliability and safety for the internal or external subjects involved in the business processes.

The activities of design and aesthetic conception which can be requested the credit in question are those carried out by companies in the textile and fashion, footwear, eyewear, goldsmith, furniture and furnishing and ceramics sectors for the conception and realization of new products and samples.

They aim to significantly innovate beyond the company's products (including complex product components, packaging, presentations, graphic symbols and typefaces) in terms of shape, other non-technical or functional elements (e.g. line features, contours, colors, surface structure, ornaments).

For companies operating in the clothing sector and in other sectors in which the periodic renewal of products is envisaged and the activities relating to the design and creation of new collections or samples that present elements of novelty compared to the previous ones are relevant.

In addition to the foregoing, the Italian State recognizes a tax credit to companies that, until 31 December 2022, purchase new capital goods destined for production facilities located in disadvantaged geographical areas[16]. It is the companies that make new investments in the following regions of Central and Southern Italy (Basilicata, Calabria, Campania, Puglia, Sardinia, Sicily).

[16] Eutekne banca dati, Investimenti in aree svantaggiate, agg. 2021.

This includes companies making new investments in assisted areas of the regions Molise and Abruzzo.

The investment, which must be part of an initial investment project, must concern the acquisition (also through leasing) of new capital goods, intended for existing or newly established production facilities, falling within the category of machinery, plants and various equipment.

Consequently, the following remain excluded: real estate and vehicles, merchandise goods (autonomously intended for sale), goods transformed or assembled to obtain goods intended for sale, consumables.

Recently, with the Sostegni bis decree, the Italian State provided for the establishment of a fund for 2021 with an endowment of 10 million euros to support the tanning industry, protect the supply chains and plan design activities, experimentation and research and development.

The resources of the fund in question are destined to the districts of the tanning sector present in Italy and recognized by regional legislation.

In particular, the tax credit is granted until 31 December 2021 to companies operating in the textile and fashion, footwear and leather goods sectors[17].

Returning to networks, as mentioned, the moment in which collaborative networks expand is an advantage for the districts. In fact, there is no conflict between districts and networks but only the guarantee of giving greater flexibility.

[17] Eutekne banca dati, Crediti d'imposta per le imprese, agg. 2021.

Other advantages of the districts are, in addition to the division of labor and high specialization, which guarantees productivity and flexibility, the regional connotation both from a cultural and infrastructural point of view and the connections to the district network.

The birth of innovative projects manages to give greater pressure to the sharing of projects between companies in the same supply chain.

Besides, in this case the territory will have to do its part by providing development support tools through organizational bodies that will have to consolidate the heritage of productive know-how in the territory itself and give life to new circuits of knowledge capable of giving a real transfer between those who creates and who uses them.

Regarding industry 4.0, the Italian government has also provided for a tax credit for purchases, intended for production facilities located in Italy, made from January 1, 2020 to December 31, 2020, or by June 30, 2021, if booked by December 31, 2020, with advance payment of 20% of the total price.

From 2020 it replaces the deductions deriving from both super depreciation and hyper depreciation, with different percentages depending on the type of investment made.

The credit is due to businesses, regardless of their nature (individual or collective) or size and the accounting regime adopted: ordinary or simplified or flat rate (including agricultural businesses that determine income on a cadastral basis).

The only conditions are that:

- the investment is intended for production facilities located in Italy;
- the rules on safety in the workplace and the regularity of the obligations of payment of the social security and welfare contributions of the workers are observed (an irregular DURC precludes the use of the credit).

The credit was extended until 31 December 2022 (30 June 2023 in the presence of specific conditions); the relative discipline, while confirmed in its structure, contains some new features: generic intangible assets are also included in the benefit; the credit rates, the limit of eligible expenses and the faster distribution of the credit make it more favorable than the previous one.

Companies wishing to benefit from the tax credit must indicate the data relating to the credit in the tax return. In addition, they must send the Mise via PEC a communication in electronic format, digitally signed by the legal representative of the company.

For investments in capital goods 4.0, previously facilitated with hyper-depreciation, companies are required to alternatively produce a simple technical report issued by an engineer or an industrial expert registered in the respective professional registers or a certificate of conformity with a date certain (digital signature and time stamp) issued by an accredited certification body, specifying:

- that the goods have the technical characteristics required by law;

- that the assets are interconnected with the company production management system or with the supply network.

For the purposes of the subsequent checks, the beneficiaries must keep, under penalty of revocation of the benefit, the documentation suitable to demonstrate the actual incurred and the correct determination of the eligible costs.

The tax credit in question partially overlaps with the less convenient one envisaged for investments made in 2020, therefore also between 16 November and 31 December 2020, with a queue until 30 June 2021 for bookings made by the end of 2020.

In this regard, the Revenue Agency has clarified that it is necessary to distinguish:

- if the investment has been booked by November 15, 2020, paying the 20% deposit, and the investment has been completed by June 30, 2021, the previous regulations, envisaged for 2020 investments, apply;
- in the absence of a reservation before November 16, 2020 with the payment of the relative deposit, the new regulations apply (investments 2021/2022). So, if on November 15, 2020 the binding order has been placed but the minimum deposit of 20% has not been paid.

As seen, in Italy, the Industry 4.0 or Enterprise 4.0 Plan moves along two lines: innovative investments and skills (Orazi, Sofritti, 2020).

Innovative investments incentivize private investments, increase private spending on research and development (R&D), strengthen finance in support of Industry

4.0. Second skills spread the Industry 4.0 culture through training initiatives: school-work alternation, university courses, innovative doctorates.

Hence, for economic and industrial development, a further key phenomenon is the emergence of Industry 4.0 paradigm. This can be seen as the cutting edge of technology and organizational innovations linked to the exploitation of current information advances technologies (Kagermann et al., 2013; Fitzgerald et al., 2014). Several academic scholars have explored its diffusion (Horváth and Szab o, 2019) and its impact on businesses (Barrett et al., 2015; Arnold et al., 2016; Muller et al., 2018).

Some recent studies have evaluated the technological approach of Industry 4.0 (Götz and Jankowska, 2017; Hervas-Oliver et al., 2019).

These studies focus on specific institutional projects, related to the introduction of Industry 4.0, while less emphasis is placed on the exploration of the variety of knowledge dissemination initiatives promoted - also independently - by companies e non-commercial actors within the ID, the combination of which could generate greater awareness e interest between identification companies (Pagano, Carloni, Galvani, Bocconcelli, 2019). As we have seen, the agglomeration of enterprises is a relevant phenomenon for economic and industrial development. Industry 4.0 is a phenomenon related to the technological vanguard and innovation linked to the current advances in technological information (Fitzgerald, 2014).

CHAPTER TWO

THE DISTRICTS OF THE MARCHE REGION

2.1 HISTORICAL PROFILES

Over the last thirty years, industrial districts have supported the growth of the Italian economy. Various transformations are taking place in the Italian districts that involve businesses, international openness, and the differentiation of strategies.

This chapter analyzes the historical profiles of the Marche industrial districts, their development but also their difficulties. As far as development is concerned, the years that favored the growth of small and micro enterprises increasingly specialized in single stages of production and the various sectors of greater importance in the region are analyzed. As regards the difficulties, the causes that led to the crisis of the districts are analyzed. Hence from the inadequate growth of competitiveness to the stagnation of internal consumption, from the lack of marketing and communication skills to scarce financial resources, from organizational/managerial problems to strong competition (Pencarelli, 2010).

Within the Marche footwear districts we are witnessing the affirmation of some leading companies. An analysis made it possible to identify two main lines (Cutrini, Micucci and Montanaro, 2012):

- one of marked qualitative differentiation, supported by investments in the brand, in research and development, in dedicated commercial networks, remunerated by a high price.
- another that tried to contain the costs of medium quality productions, also by delocalizing abroad (focus on costs).

From a national point of view, Italy arrived late on the international scene of the production system but this did not prevent it from reaching advanced levels in a short time. Structurally, compared to other countries, Italy has peculiar characteristics. For several years, Italian economic growth has been based on a large number of small businesses grouped into industrial districts and on a production specialization focused on traditional sectors.

In the 1970s, we start talking about Third Italy: in particular, alongside the North-West and the South, the Central-North-Eastern regions emerge, made up of light industrialization areas. At that time we start talking about the NEC area (including the regions of North-East and Central Italy) (Castronovo, 2003).

Indeed, the aforementioned regions have a similar socio-economic fabric and are, moreover, united by the fact that in the past they had a backward economy based on agriculture, and then moved on to an industrial economy.

Italy was also formed by the NUTS regions, including the North-East (Trentino Alto-Adige, Friuli Venezia Giulia and Veneto), and Emilia Romagna.

The NEC, characterized by the presence of small and medium-sized family businesses and the spread of industrial districts, acted as a buffer between the strong economy of the North-West and the underdeveloped economy of the South. Central Italy underwent a clear recovery in the twentieth century thanks to the growth in demand and real income.

Notably in the 1950s in Italy there was an increase in the demand for consumer goods and the differentiation of the same in the 1970s and 1980s.

Unfortunately, at the end of the 1990s there was a reduction in the demand for Italian products, caused by the new markets of Eastern Europe and Asia.

Also in the 90s, an industrial district model that was unchanged compared to the 70s was re-proposed. The restructuring of the district organizational system following the structural crisis of the 1980s has resulted in an industry structure not very different from the existing one, except for the presence of some informal groups (Balloni, Iacobucci, 1997).

District companies need to review their way of being on the market, to reposition their products, to introduce technological innovations capable of increasing productivity and product quality, but also to reorient the competition-collaboration relationships (Alessandrini P., Canullo G., 1997).

Subsequently and precisely in 2001, with the introduction of the euro, Italian products became very expensive, until 2008 when several sectors were hit by the

crisis. It is above all small businesses that are forced to close: in the Marche region, only in 2008, several businesses have lost profitability and employment.
Between 2007 and 2019, there was a decline in exports of more than 222 million euros due to the collapse in exports of household appliances and exports of furniture and footwear.
In 2020, due to the pandemic, the districts of the Marche recorded a drop in exports of 18.6% and achieved 3,382 million euros in exports, totaling a decrease of 18.6% compared to the previous year (District Monitor, Intesa San Paolo, 2021). Fortunately, 2021 begins with positive data for the exports of the Marche districts. As we will see in the following paragraphs, for the relaunch, the Marche requires investments in innovation and digitalization, environmental sustainability and internationalization. In fact, investments in digitization are important to increase the attractiveness of the region but also to allow an enhancement of the offer of companies in global markets. Meanwhile, investments in the environmental transition are useful for accelerating growth and making it more sustainable. The specializations of the districts of the Marche region concern Fashion, Mechanics, Paper and Musical Instruments. The largest district is that of Fermo Footwear.

2.2 THE DEVELOPMENT OF THE MARCHE DISTRICTS

Most of the companies in the Marche region are mainly focused on the industries of mechanics, footwear, leather goods, mobile wood, clothing textile.

Among the main districts of the Marche, there are: the textile-clothing district of Urbania, Sant'Angelo in Vado, Pergola and Sassocorvaro, the multi-sectoral district of Recanati, Osimo and Castelfidardo, the mechanical district of Fabriano, the district of wood and furniture in Pesaro, Fossombrone and Piandimeleto, the footwear district of Fermo, the agro-industrial district of San Benedetto del Tronto, the leather and hide district of Civitanova Marche and the hat production district in the areas of Montappone and Massa Fermana. As for the main production specializations, for the mechanical district we remember the production of extractor hoods and white appliances. For the textile-clothing district, mention should be made of the research, design and computerization of machinery and the production of clothing. For the wood and furniture district, the construction of wooden furniture, the production specializations to complete the activities of the main supply chain and the kitchen sector are known.

The production of all components for footwear, the production of leather and leather and footwear for all categories of consumers is famous for the leather and footwear district. For the footwear district, mention should be made of the production of all components and materials for footwear and the production of footwear for all categories of consumers.

For the hat district we remember the making of hats and headdresses of other shapes / materials, the production and packaging of straw hats and the processing of other accessories for clothing. Finally, for the agri-food district we remind the design and construction of machinery, plants for the processing, conservation and packaging of products and related service activities (assistance, maintenance, marketing of technical items, etc.), the processing and conservation of fish, fruit and vegetables, the production of specific packaging and the production of wines.

Certainly, that of mechanics has a higher incidence than the others thanks to the number of companies, employment, exports and added value.

After that, there is the footwear and leather goods sectors, that of mobile wood and finally the textile and clothing sector. As for mechanics, it must be remembered that 10% of the workforce of reason is concentrated in this.

The mechanical sector develops in Fabriano's and in the Jesi's areas: in the first the household appliance sector is famous, in the second the manufacture of means of transport, electrical and mechanical appliances and the processing of metal products. In the 1980s, the mechanical sector underwent economic development.

In fact, the companies from the Marche have seized the new opportunities that the market offered.

In 2000, the companies in the Fabriano mechanics district saw a change in the competitive conditions which, instead, favored the household appliance sector. In fact, in the home appliance companies have thought of drastic restructuring.

In the period of crisis, the dynamics of the diffusion of investments seem to follow, sometimes with a delay, the dynamics of production: this happens until the first half of 2012. Subsequently, until the first half of 2014, investments grow in diffusion. As this diffusion among micro-enterprises increases, the diffusion of investments directed to the growth of production capacity (real estate) increases; when the diffusion of investments decreases, their concentration in machinery and plants tends to increase, the presence of which becomes dominant.

It should be remembered that, in the Marche region, the textile and clothing sector has had a not insignificant economic development but this has undergone several slowdowns due to the crises of the 1980s, 1990s and early 2000s (V. Castronovo, 2003).

On account of the ongoing process of globalization, the district has undergone several transformations: various productions have moved abroad and this has put local businesses in crisis. To overcome the competition from new producing countries, the districts have tried to orient their product towards quality, with innovations and technological updates, the enhancement of their creations and direct marketing with their own brands.

In the sector, the rebalancing between the types of investments is evident between 2010 and 2012; in the following period, and then in the last two years, this relationship reappears but less decisively. As for the footwear district, it existed in the Fermano-Macerata area from the 1950s to the 1960s; it is the production of slippers concentrated in the area of Montegranaro and Sant'Elpidio a Mare.

This district was born from ancient artisan traditions present in the area since the early nineteenth century. The shoe factories have outsourced many operations to highly specialized subcontractors and thus have developed a multitude of small and medium-sized enterprises specialized in the various phases of the production cycle; the supply chain system based on small firms was able to guarantee production flexibility and economies of specialization and to benefit from the district's external economies (Blim, 1990).

For the '60s and ‘70s, companies from the Marche region offered high quality products at low cost. This has favored the growth of small and micro enterprises increasingly specialized in single stages of production. Already in the second half of the 1970s, the Italian footwear sector has faced with growing International competition. During the 1980s, due to competition from the newly industrialized countries, the weakness of the national footwear district and the Marche region stood out.

In those years, profound structural transformations took place, with changes in the framework of the sector such as competition from emerging countries, rising costs, discontinuity in demand with a reduction in the internal market.

These phenomena intensified in the early 2000s (Dini and Goffi, 2008), with the consequence of the slowdown in production, mainly due to a decrease in domestic demand. Due to the increase in the productivity of emerging countries, there is a growth in competition for products from developing countries. This has caused the closure of many small businesses that have undergone the growing processes of relocation especially in Eastern Europe. The district has always been characterized by individualism, with collaborative relationships established almost exclusively along the production chain (Morganti, 2007).

This is certainly a very important limitation when the competition comes from giants capable of producing an enormous quantity of shoes at low cost. Consequently, investments in design, product innovation and a shift towards the medium-high range of production have followed (Cirese, 2007).

Finally, in 2005, the sector experienced a recovery that lasted until the 2008 crisis. Between 2007 and 2009, investments drop quite sharply and then between 2008 and 2009 they tend to grow. With the resumption of production in 2011, there is also a phase of recovery in the diffusion of investments. Since 2013, the diffusion of investments among companies in the sector starts to grow again until 2014.

The Pesaro furniture wood district represents the third Italian furniture pole. The first is that of Brianza, then that of Treviso-Pordenone. In recent years, the district has been witnessing several changes in the competitive environment. In particular, low-cost producers have entered world markets and have concentrated on the low end of the product range. Therefore, the markets of industrialized countries made it necessary to increase the quality and design of the products.

Furthermore, a different relationship was born with the customer due to marketing policies, more personalized products, and changes to the distribution structure.

Unfortunately, this has caused various damage to small businesses, leading to a drop in hiring, an explosion in the use of mobility and layoffs in the Pesaro area (Marche Region Labor Market Observatory, 2014).

Since 2013, in mobile woodcrafts, production and demand have not improved. Furthermore, investments are in waning diffusion, unlike in the other three sectors. Returning to the industrial districts of the Marche region, as regards micro enterprises, it should be noted that:

- they are active in demand segments where the local component has a certain importance;
- on the raw materials and semi-finished products side they depend on medium-large suppliers;
- they decrease production capacity in the least expensive way;

- they also tend to save in terms of expenses for goods handling (through new vehicles or modes of transport).

However, the fact that these companies are largely characterized by very small dimensions, unites these sectors for some no less important aspects: the reduced ability to organize a market presence that goes beyond local borders; low bargaining strength towards suppliers; the reduced amount of financial resources and the inadequate ability to collect and process information (financial, technological, market) further increase uncertainty and do not allow investments to be made.

In 2020, due to the pandemic, the districts of the Marche recorded a drop in exports of 18.6%. In 2021, on the other hand, starts with positive data for exports of the Marche districts, which is + 3.3% and 5 out of 9 districts are already growing, four of which are above the export levels of the first months of 2019 (District Monitor, Intesa San Paolo, 2021).

Taking the individual Marche districts as a reference, the Home System stands out, where both the Fabriano range hoods and appliances district (29.5%) and the Pesaro kitchens (+ 11.5%) are growing by double figures have largely exceeded the pre-Covid levels of the first quarter of 2019 (+9.5% and +14.3% respectively). Excellent results also for machine tools and wood in Pesaro (+13.6% the trend change and +4.7% compared to the first quarter of 2019), musical instruments in Castelfidardo (+12.2%, +19, 3% compared to 2019).

The Fabriano paper factory also did well (+5.7%), which however is still below the pre-Covid levels of 2019 (-6.2%). Exports of the districts of the Fashion System are in great difficulty (-9.4%), all down compared to the first three months of 2020:

- Footwear from Fermo (-8.2%);
- Marche clothing (-4.9%);
- Tolentino leather goods (-24.2%);
- Montefeltro jeans valley (-0.6%).

The export trend on mature markets was good (+4.8%), thanks to the driving force of France and the United States. The increase in sales on new markets was more slight (+0.9%), where the excellent results obtained in China, Saudi Arabia and the United Arab Emirates were almost completely offset by the reduction in Lithuania, South Korea and Romania. In the coming months, district exports are expected to continue their recovery path and, very likely, several districts will already be able to complete the recovery of what was lost on foreign markets during the pandemic crisis by the end of 2021. District companies will be able to seize the growth opportunities present on international markets, where trade is rapidly accelerating.

In 2021, the largest organic district in Europe was born in the region, which includes 2100 companies for a total of 71 thousand cultivated hectares and 100 million in turnover.

The purpose of this district is to promote and support Marche's organic agriculture and its products with the help of Coldiretti, Confagricoltura, Confcooperative, Copagri, Legacoop, Uecoop, Unci and the Marche Chamber of Commerce, etc.
Today, the Marche region is the first in terms of number of cultivated hectares and, as such, aims to present itself as a single entity, to have a greater weight on the Italian and international market at a promotional and commercial level.
The goal is also to become a territorial brand that identifies organic products par excellence, through territorial marketing and promotion that enhances the product.
Moreover, even for the Marche region, incentives for Research and Development are increasingly necessary today. In fact, in this sector investments see Italy in one of the lowest positions in the European ranking but also in that in which there are all the most industrialized countries. From the point of view of local development policies and governance, the implementation of tax concessions for innovation and targeted digitization policies are crucial tools. As already mentioned in the first chapter, for investments in research and development (R&D), technological innovation and other innovative activities (design and aesthetic conception) carried out from 2020 to 2022 (even if relating to projects started in previous years), it is recognized a tax credit.
The beneficiaries are companies resident in Italy, including permanent establishments of non-resident entities, regardless of the legal form, economic sector to which they belong, the size and tax regime for determining the

company's income, which make investments in R&D activities, technological innovation and design and aesthetic ideation. The tax credit is equal to 20% of the eligible expenses, up to a maximum limit of € 4 million[18].

To use it, companies must prepare and keep a technical report illustrating the purposes, contents and results of the activities carried out in each tax period in relation to the projects / sub-projects in progress. The technical report must be prepared by the company manager of the activities or by the manager of the single project / subproject and countersigned by the legal representative of the company.

The statutory auditor must certify the actual incurring of expenses and correspondence to the accounting documentation, even for companies not required to carry out the statutory audit. Only for the latter, the costs for certification are relevant for credit purposes for an amount not exceeding € 5,000[19].

The Financial Administration verifies the due tax credit and the correct application of the discipline, based on the certification, the technical report, as well as on the basis of the additional documentation provided by the company.

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[18] For the production facilities of some regions, including the Marche, the tax credit is equal to:

- for large companies with at least 250 people and with a turnover of at least € 50 million or a balance sheet total of at least € 43 million, 25%;
- for medium-sized enterprises with at least 50 people and with a turnover of at least € 10 million, 35%;
- for small businesses with fewer than 50 people and with a turnover or balance sheet total not exceeding € 10 million, 45%.

[19] For investments made in 2021/2022, businesses, by the date of submission of the tax return referring to each tax period in which the investments are made, must send the Mise via PEC a communication in electronic format, digitally signed by the lawyer. representative of the company, with the relevant information relating to the investment.

If the financial administration ascertains the undue use (even partial) of the tax credit, it will recover the relative amount, with interest and penalties.

In addition, with the aim of encouraging the recovery of businesses, the Italian government, in addition to the aforementioned tax credits, has provided various concessions for start-ups. In fact, the corporations that possess particular requirements and that carry out innovative activities benefit, for a period of time from their establishment, of a facilitated tax regime that also affects the workers employed by the company and the investors who bring new capital into it.

It must be a capital company, spa, srl, sapa, cooperative resident in Italy or in a member state of the EU or EEA (provided it has a production site or a branch in Italy. The corporate purpose must consist mainly in the development, production and marketing of innovative products and services with a high technological content (the two requirements of innovativeness and high technological value must both be satisfied, as they are not alternative but cumulative)[20]. If, during the life of the start-up, the initially satisfied requirement is not satisfied, the company does not lose the start-up qualification if the presence of at least one of the other two requirements is continuously verified. The modification can take place without the need to leave and re-enter the special section of the Business Register.

[20] Specifically, in carrying out the activity, the start-up must satisfy at least one of the following three additional requirements:

- incur significant research and development expenses;
- employ highly qualified personnel;
- possess the ownership of licenses, patents or trademarks in innovative sectors.

The start-up must employ, for any reason, employees or collaborators, who must alternatively possess a research doctorate or carry out research activities, certified for at least three years and a master's degree.

The staff employed of the first type must be at least equal to 1/3 of the total workforce employed in the company. That of the second type must be equal to 2/3 of the total workforce. Another issue related to industrial districts is digitization. In particular, the pandemic has highlighted that the issue of digitization is closely connected with the needs of social justice (Bruni, 2020).

This means that digital technologies affect every area of daily life and social and work relationships (Carsten Stahl, 2011; Hofmann, 2013).

While in the pre-pandemic phase this evidence was far away, as digitization resembled those long-term projects whose horizon faded from the concrete of politics, in the pandemic phase that indefinite future became immediately present.

Italy is digitizing many industrial sectors, but its investments in Industry 4.0 are lower than both the French and German ones. Furthermore, the organizational models and the Italian institutional planning appear slacker due to a territorial unraveling of development governance. In Italy, the digitalization of production processes meets private and public investment in research; excessive presence of SMEs below the threshold of technological innovation; insufficient contribution of large companies to the innovation of production processes; inadequate institutional coordination of public investment strategies; low propensity of the production structure to absorb highly scientifically qualified work; brain drain in countries that are more innovative and rewarding the contribution of research activities. The realignment of these delays is necessary to accompany the social, economic and administrative digitization of the country, all the more in function of the territorial differences that characterize it. The relationship between SMEs and technology raises several critical issues: the implementation of new technologies in small and medium-sized companies in fact needs to be adequately "governed" and negotiated locally. In this sense, it is important to create a culture of innovation that also passes through networks of local actors (leading companies, research centers, local authorities, trade associations, etc.).

In addition, industry 4.0 pushes to find some technological solutions aimed at supporting industrial automation processes, optimizing production processes and promoting collaboration between companies through integrated logistics management. All this is certainly changing the professional profiles of workers, with a reduction of more traditional manual activities; we are therefore witnessing a transformation of work (intelligent human / machine interfaces), a transfer of work and a search for high levels of flexibility. In fact, on the one hand, the adoption of machines driven by computerized systems will require workers with certain professional knowledge and adequately trained and, on the other hand, there is the risk of a reduction of those activities that require the performance of repetitive work.

2.3 THE MOST DIFFICULT YEARS OF THE MARCHE DISTRICTS

Although the Marche has always been considered among the Italian regions with the greatest diffusion of micro and small enterprises, for manufacturing and family production, the enterprises have suffered a profound crisis. SMEs in the Marches have a clear process of consolidation from the point of view of organizational structures and from that relating to the number of employees.

In the Marche, half of employment is concentrated in micro-enterprises which play a decidedly important role, as in the rest of Italy (Goffi, 2015).

It should be remembered that in the Marche region there is a progressive emergence over time of an aggregate of medium-sized enterprises (Balloni and Iacobucci, 1997), corresponding to a progressive "hierarchization" of the functional relations of the districts. Medium-large companies, even if they are involved in a restructuring process, count on international markets and on more effective managerial functions than small companies. Due to the inadequate growth of competitiveness and the stagnation of domestic consumption, artisan businesses have not been able to seize opportunities on foreign markets, due to the lack of marketing and communication skills, scarce financial resources, organizational/management problems, strong competition, demand instability (Pencarelli, 2010).

Production has affected the way the crisis spreads: the close chain of relationships has in fact transmitted the recessionary impulses from the major exporting companies to smaller companies, their subcontractors, with great speed (Iuzzolino and Micucci, 2011).

The exporting companies have managed to reorganize, unlike the small ones that do not have effective managerial functions, high commercial skills and advanced support services. Especially for these reasons, the crisis of recent years has particularly affected small businesses (Pompei and Venturini, 2011).

The crisis interrupted the growth in the number of artisan enterprises recorded by the Marche up to 2008. The crisis that has hit the Marche region concerns its traditional specialization sectors: footwear, household appliances, furniture and leather goods. In particular, the Marches were hit by the 2009 and 2014-2015 crises which affected the Russian market and therefore affected the region's exports. Especially the crisis related to oil has contributed to disrupt Russia, which was the fourth outlet market for trade flows in the region in 2008. Due to the crisis in the Russian market, the Footwear sector in Fermo had negative consequences. In 2016, due to the earthquake that hit central Italy including the Marche region, the crisis worsened. Notably, in 2019, the region's GDP reports a decline of 7% compared to 2007, heavier than the decline shown by the national GDP (-4%) (District Monitor, Intesa San Paolo, 2021).

Between 2007 and 2019, there was a decline in exports of more than 222 million euros due to the collapse in exports of household appliances and exports of furniture and footwear. The only sector to counter the crisis is the Chemicals, the Electrical Engineering and the Pharmaceuticals. It is evident that the tourism sector between 2012 and 2016 had a positive trend; in 2016, the earthquake unfortunately interrupted this trend until 2018. In 2019, on the other hand, there was a 7.7% growth in tourist presences compared to the previous year. But despite this, the presences of tourists in the Marche are 9% lower than in 2008.

In 2019, in the Marche region, there was the presence of 10.4 million tourists, with an average stay of 4.3 days, higher than the Italian average which stood at 3.4 days. Although we must not forget that even before the crisis, the expansion of the districts seemed to have stalled and the profitability in the districts was lower than elsewhere, while productivity was decreasing; the impact of the crisis was also more intense in comparison with non-district companies (Iuzzolino and Micucci, 2011).

The Marche is the region in which the weight of manufacturing on total employment in Italy is greater. The comparison with Veneto, Emilia Romagna and Tuscany, regions with a production structure similar to that of the Marche region, shows how, despite the crisis, manufacturing still plays a very important role in the Marche. For several years in the Marche its manufacturing connotation remains unchanged. In fact, compared to other Italian regions, the number of employed in services and industry has not changed. In 2020, due to the pandemic, the districts of the Marche recorded a drop in exports of 18.6% (District Monitor, Intesa San Paolo, 2021).

In 2020, the districts of the Marche achieved 3,382 million euros in exports, totaling a decrease of 18.6% compared to the previous year. In 2020, none of the Marche districts recorded a positive evolution of exports in 2020. Although down in 2020, three districts mitigate losses or move into positive territory in the fourth quarter of 2020: Machine tools and wood for Pesaro (-11.2%, but +2.5% in the fourth quarter of 2020); Fabriano paper factory (-13.2%, +1.5% in the last quarter of the year); Musical instruments from Castelfidardo (-7.6%, -0.6% in the fourth quarter).

Exports of the districts of the Fashion System are in great difficulty (-26.3%), penalized on the supply side by supply problems and the suspension of activities and on the demand side by the reduction in household income, the blocking of movements and the lack of consumption by tourists, especially foreigners. Significant retreat in the footwear district of Fermo (-25.6%), followed by Clothing (-22.4%), Pelletteria di Tolentino (-33.6%) and Jeans valley del Montefeltro (-25.9%).

The most important drops in exports concerned the main export markets in the Marche district: Switzerland, the United States, the United Kingdom, France, Spain, Russia, Germany, Hong Kong and China. However, the trend reversal of the two main outlet markets of the regional district complex, Germany and France, should be highlighted, where in the last three months of 2020 exports returned to growth, mainly thanks to the Fabriano range hoods and appliances.

As seen in the previous paragraph, 2021 fortunately begins with positive data for the export of the Marche districts, which marks a +3.3% and 5 out of 9 districts are already growing, four of which are over export levels in the first months of 2019. For the relaunch, the region requires investments in innovation and digitalization, environmental sustainability and internationalization:

- investments in digitalisation are important to increase the attractiveness of the region but also to allow an enhancement of the offer of companies in global markets;
- investments in the environmental transition are useful for accelerating growth and making it more sustainable;
- a greater commercial rooting passes through the opening of commercial branches abroad.

To achieve these objectives, the Marche region must aim for active policies capable of involving interested parties: from institutions to entrepreneurs and representative associations (District Monitor, Intesa San Paolo, 2021).

It is possible to give voice to real start-ups capable of owning the ownership, license or filing of a patent, trademark, model, copyright relating to an industrial or biotechnological invention. Perhaps in those start-ups having as their main purpose the development, production and marketing of innovative products and services with a high technological content. In fact, as mentioned in the previous chapter, the agglomeration of enterprises is a relevant phenomenon for economic and industrial development. Industry 4.0 is a phenomenon linked to technological avant-garde and innovation linked to current advances in technological information (Fitzgerald, 2014).

CHAPTER THREE

THE DECLINE OF THE MARCHE DISTRICTS

3.1 WHY THE DECLINE?

This chapter analyzes the main causes that led to the crisis in the Marche industrial districts and the recent initiatives promoted by the region to favor their recovery. In detail, among the causes that led to the decline there is the lack of cooperation between the various districts, the low investments in product and process innovation, the inability to control the outlet markets, the lack of attention to changes in demand, the competition from some Asian and Eastern European productions, the limited skills in financial management, the lack of specialized professionalism, the limited support from local authorities. However, some districts have been able to regain certain levels of competitiveness thanks to the joint effort in the application of product and process innovations, cooperation with other companies, planned relocation, collaboration with social partners, autonomy of sub-supplier companies, marketing strategies and personnel training, synergies with universities and research centers, in the presence of various leading companies that coordinate different supply chains (Ricciardi, 2013).

The industrial vocation of the Marche region is recent, in fact it is only from the second half of the twentieth century that it has passed from a purely rural culture to a manufacturing and industrial one (Chiapparino, 2008).

Thanks to endogenous factors of the territory, in the years following the Second World War, a network of elements characterizing the industrial districts was created, such as: the extended family, income from various work activities, growing experiences in the manufacturing sector and last but not least the cultural factors. The territory, made up of small and widespread urban realities, has undoubtedly favored the development of artisan and manufacturing traditions that have given life to a district production network with different specializations.

After the long period of crisis in the fashion sector in 2000 and the national recession that began in 2008, we finally arrive today at a diversification of production still anchored to the traditionally understood shape of the district. It can be deduced that what is defined as the district effect clearly persists (Blim, 2015).

The organization of enterprises in a district form covers the entire regional territory in a capillary way. However, various difficulties in having univocal data for the cataloging of industrial districts must be considered, depending on the survey criterion used, a discretion that does not allow easy comparison. In the territory there are various elements that revolve around the local production system and act as a link with public and private entities, a network that has been created thanks to the possibility of using public funds.

The different elements are linked together by a circuit of territorial relations that see intrinsically linked: the Region; regional, national and community funds; research, quality and innovation projects, internationalization; the local production system; SMEs, other private and public entities; il Coico (Comitato di

Indirizzo e di Coordinamento), Steering and coordination committees (Cresta, 2008).

This virtuous circuit allows the development of projects and initiatives from which the districts benefit in terms of research and development, innovation and quality, thanks also to the collaboration with the University and the research centers of the territory. Approximately at the end of the 90s and the beginning of 2000 there were several relocation strategies took place with the aim of reducing production costs with negative effects on local employment (Paradisi, 2004).

The workers were linked to the district as in a sort of symbiosis between production and private life (Becattini, 1989).

Around that time, several young people started looking for other opportunities outside the districts (Blim and Goffi, 2014).

The traditional view of industrial districts on the one hand has overestimated geographic proximity in the transfer of knowledge between firms and, on the other hand, underestimated the importance of knowledge creation within the firm (Boschma, 2005).

In the Marche region, the concept of development without fractures has continued for years (Fuà and Zacchia, 1983).

This concept has described the Marche economic model very well but slowly the conditions have changed, so it could be misleading to speak of development without fractures; perhaps it is better to speak of fractures without development. Often the dynamic and competent local systems have been kept on the sidelines of

public policies, due to a prevalence of a district approach of a mechanical type (Favaretto, 2000).
The indicators show in the Marche a truly consistent weight of craftsmanship: much higher than in other Italian regions. The consolidation processes of the Marche business fabric are evident from the point of view of organizational structures (such as the increase of companies) and from the point of view of the expansion of the number of employees, despite the fact that the small business continues to play a marked role. In other words, half of employment in the Marche is concentrated in micro-enterprises. Although in a profound restructuring process due to the difficult economic situation that has affected the internal market, medium-large companies have been able to count on more effective managerial functions than small companies but also on greater openness to international markets.

Due to an inadequate growth in competitiveness and the stagnation of internal consumption, the companies of the Marche region have not been able to seize the opportunities on the international markets. This is also due to the various limitations present in small businesses, such as: lack of organizational-technological knowledge supported to modify the economic behavior of small entrepreneurs (Carboni, 2005), organizational/managerial problems, lack of specialized marketing and communication skills, unskilled and unskilled labor market, fragility of the sales network, scarce financial resources, strong competition, legislative context and instability of demand (Pencarelli 2010).

In periods of crisis, important choices (for example investments, innovations) that could lead to opening up new market spaces are postponed and subject to the restoration of the previous economic conditions (Cucculelli, 2004).

In the industrial districts, the productive organization has done nothing but reflect on the ways in which the crisis is spread. In fact, the chain of relationships quickly transmitted the recessionary impulses from the major exporting companies to smaller companies (Iuzzolino and Micucci, 2011).

With the difference that the major exporting companies have been able to reorganize themselves, compared to small companies that do not have managerial functions or commercial skills. For these reasons, the crisis has particularly affected small businesses for several years (Unioncamere Marche, 2015; Pompei and Venturini, 2011; Goffi and Dini, 2013; Trend Marche, 2014).

In fact, the region constitutes a particularly representative area for investigating what the effects caused by the crisis have been on the fabric of small and very small businesses.

Technological innovation, the emergence of new competitors and the increase in competition in the global market have created profound difficulties for companies in the Marche region and beyond.

In this context, micro enterprises experienced the crisis dramatically: they decreased in number and lost employment and profitability (Presbitero and Venturini, 2013).

These companies have tried to go international and find a remedy for the fall in local domestic demand. It must be said that foreign turnover has also been decreasing (Dini, 2013), generating a competitiveness crisis that contributes to further aggravating the fall in domestic demand.

In this regard, it should be noted that if the products of micro enterprises are not competitive abroad, it is likely that they are not even competitive in the area in which they are made (Dini, 2013).

It should be remembered that the Marche have been characterized by a model of widespread industrialization, which took place through the growth of systems of small businesses that made use of labor from agriculture, with a particular balance between economy, institutions and society (Paci, 1980; Fuà, 1983).

This model of widespread industrialization has helped to transform the Marche from an agricultural reality to a manufacturing one, which has experienced strong economic development, with sectors and companies of excellence both nationally and internationally. As we have seen, the region recorded: slow economic development in the 1950s, accelerated recovery from the mid-1960s to the mid-1980s and then slowed down in subsequent periods (Canullo and Fabietti, 2001).

The economic success of the Marche stemmed basically from having transformed regional specialties of the pre-industrial era, such as the manufacture of shoes and furniture into industrial export goods. Minimal capitalization and low labor costs, along with expanding national and international markets for low-priced and medium-quality goods have fostered this new prosperity (Blim, 2000).

Over the years the SMEs of the Marche have evolved and structured, we have witnessed consolidation processes from the point of view:

- of the organizational structures: with the increase of the enterprises constituted in partnership, in particular of capital;
- the expansion of the number of employees: macroeconomic indicators have shown an excellent economy and a dynamic labor market in the Marche region (Alessandrini, 2004; Diamanti, 2004).

At the beginning of the 2000s there was a turnaround for the local economic system, with entire sectors in crisis, the closure of numerous businesses and an increasingly frequent use of social safety nets (Marche Region Labor Market Observatory, 2007).

An example of this is the erosion of the competitive advantages in the production of consumer goods of the more traditional part of Made in Italy, due to the low cost competition of goods from Asian countries (Dini and Goffi, 2008; Osservatorio Mercato del ARMAL work, 2005).

Industrial districts are born when workers and entrepreneurs meet to discuss mistakes and perspectives: these processes today, due to enormous technological changes and different competitive conditions, no longer work (Calza Bini, 2004).

It is to this phase of uncertainty and profound transformation of the regional production system that the effects of the serious crisis are added, which since 2009 has had significant consequences in all economic sectors in the Marche region (Marche Region Labor Market Observatory, 2012).

This concomitance has exacerbated the difficulties of artisan businesses also due to some endemic limits to the nature of the small business that do not allow it to reorganize itself in depth as it happens for medium and large businesses (Centro Studi Sistema CAN Marche, 2012).

These limits can be of internal origin (e.g. limits connected to the fragility of the sales network, organizational / managerial problems, scarce financial resources, lack of marketing and communication skills) and of external and environmental origin (instability of demand, high competition, market of low-skilled and skilled labor, legislative context, etc.) (Pencarelli and others, 2010).

Furthermore, in the local fabric of small businesses, the organizational-technological knowledge capable of inducing changes in the economic behavior of small entrepreneurs would seem to be lacking (Carboni, 2005).

3.2 ANALYSIS AND SOLUTIONS OF THE CAUSES THAT LED TO THE DECLINE

As mentioned, among the main causes that led to the crisis in the Marche industrial districts is the lack of cooperation between the various districts, the low investments in product and process innovation, the inability to control the outlet markets, the poor attention to changes in demand, competition from some Asian and Eastern European productions, limited financial management skills, lack of specialized professionals, scarce support from local authorities. The Marche region, to encourage the recovery of industrial districts, has implemented various measures of territorial governance, such as the stipulation of program agreements aimed at relaunching entrepreneurial activities, supporting investment programs, safeguarding employment levels in the territory. of the municipalities of the Marches recognized as areas of industrial crisis. The organizational model of industrial districts has an evolutionary process consisting of the following phases:

- the specialization of production;
- the strengthening of relations between companies;
- maturity.

In recent years we are witnessing the development of the third phase as the district is not yet able to provide satisfactory answers, not having the knowledge and skills necessary to the new competitive process, such as the low level of planning of cooperation between companies, technology delays, the impossibility of activating an effective control on the quality and services provided to customers, the weakness of marketing policies and functions, the lack of attention to financial management. To the causes that led to the decline are added the so-called conjunctural phenomena, such as the difficulties related to the generational turnover of entrepreneurs and workers, the competition of Asian and Eastern European productions, the lack of specialized professionals, the immobility of local authorities that govern the districts, relocation to areas where the socio-environmental context cannot be benefited.

Unfortunately, the small size of the district companies is unable to face the risk related to the uncertainty associated with the long delay in the recovery of financial outlays and the financial needs of investments.

Currently, several districts are facing the crisis while others are adopting revitalization strategies that lead to their further development. Several sociologists and economists attribute the stagnation of Italian development to the decline of its economic system (Nardozzi, 2004; Carboni, 2005), *"highlighting some critical* issues:

- *undercapitalization of Italian companies vis-à-vis their main international competitors;*
- *limited propensity of large companies to compete on open markets;*
- *dimensional fragmentation of the widespread model of SMEs".*

Surely the main cause of the lack of alignment of the Italian system with the new economy, financial and global, is given by these three factors.

In the Marche region, the worsening of the economic situation has mainly affected small businesses in typically district productions (such as, for example, textiles, food, clothing, mechanics, footwear, mechanics, furniture). In spite of everything, within the Made in Italy productions the medium-large sized companies have distinguished themselves. This determines the decline of the traditional concept of industrial district generated by a loosening of local relations and resources.

In fact, local development systems are configured as post-districts, ie models that guide territorial development, and no longer correspond to factories-territory based on a widespread supply chain of SMEs (Carboni, 1996).

Among the problems of the Marche production system there is also the delay and visions appropriate to the times: the potential of a territorial system depends more than on the technological equipment, on the existence of professional communities capable of enabling it in a strategic sense, as a source of value (Carboni, 2005).

It is the risk that the development of skills will stop, the vital process that is needed to relaunch these activities (Calza Bini, 2004).

Another constraint for the Marche economy is the lack of infrastructure: the urban layout of the Marche, in the seventies, appeared as a rather thin network with referring to the demographic consistency, but rather dense due to a multiplicity succession of medium and small cities that follow one another in the coastal strip up to the area Apennine foothills. This dense network did not benefit from adequate infrastructure a support. The districts require the presence of professional communities aimed at knowledge and increasing the innovation of the local system. A competitive response capable of relaunching local development models is to create a mix of innovation and knowledge.

In fact, the global competitiveness of a territory and its ability to build innovation, technology and knowledge are directly proportional. Some analyses of Italian districts highlight a technical-organizational transformation of the districts (Orazi, 2008; Carboni, 2009; Trigilia, 2005).

These, even if inhabited by a multiplicity of productive fabrics, increasingly present themselves as unique regional models of development oriented towards global markets and productive/organizational strategies. These transformations also affect the organization of space and the urban conformation of these areas.

At this point it is necessary to distinguish the regulatory and institutional plan from that of economic and productive innovation. As for the first, effective and widespread governance must be created, capable of motivating the whole range of economic and social actors. As for the second, the challenge is to develop the industrialization of knowledge, capable of engaging the protagonists of production, ie the Region, local authorities, universities and research centers. From a European point of view, the so-called SIRs[21] are becoming increasingly popular, ie Regional innovative systems generated by the nature of innovation from the concentration of territorial activities. The functioning of the Sir depends on:

- from the dissemination of knowledge;
- from the cistus territory as a complex type system;
- from the business cluster.

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[21] SIR is a territorial-institutional system that includes clusters of companies involved in a systematic interactive learning process (Cooke, Uranga and Etxebarria, 1997).

Basically, the SIRs need to support clusters of businesses and structures capable of implementing territorial governance strategies (Miceli, 2010).

When we talk about SIR we therefore refer on the one hand to the production structure and on the other to an institutional infrastructure. For the solutions of the causes that led to the decline and therefore for the relaunch of the district production systems, it is necessary to combine industrial policies with innovative practices and organizational forms of territorial development of the districts. Universities, public and private research centers and professional communities play a fundamental role in the innovation of local productive fabrics.

"To this end, the structuring of Competence Networks, or infrastructures for the generation of learning and knowledge, comparable to governance structures that favor specific cognitive and institutional spillovers appears of interest" (Carboni, 2009).

The Competence Networks require a start-up phase, with significant technological investments, financial and cognitive costs, in order to increase the quality of the scientific base capable of improving communication between research and businesses. In this regard, forms of intelligent governance must be developed that are capable of responding to the challenges of global markets. In these markets, the attractiveness of additional investments is totally linked to the institutional capacity to reduce transaction costs. Another fundamental point is the resumption of the internationalization of companies: recently China, from its manufacturing sector, has achieved greater advantages by increasing its contribution in the value

production chain. Certainly, these developments are a great opportunity for Italian companies as they offer complementary services.
To do this it is necessary to increase the size of the companies but also the entrepreneurial factor. From a social point of view, the complexity of the development of the territory is linked to demographic factors, such as the aging of the population or immigration, as they only outline scenarios in which the quality of life will be increasingly determined by an institutional contribution in terms of policies capable of promoting social inclusion and cohesion.
Some examples of territorial agreements and territorial governance aimed at creating virtuous circles from a socio-economic point of view are analyzed below.
The first example is the document signed on 20 March 2018 by the Ministry of Economic Development, the Marche Region and the National Agency for the Attraction of Investments and Business Development (Invitalia SpA) aimed at relaunching entrepreneurial activities; support investment programs; safeguard employment levels in the territory of the municipalities of the Marche Region recognized as areas of industrial crisis. In detail, the areas concerned concern the territories of the local labor systems of: Ancona, Cagli, Fano, Fermo, Montegiorgio, Montegranaro, Pergola, Pesaro, Sant'Elpidio, Recanati, Sassocorvaro, Urbania and Urbino.
In summary, this measure promotes the realization of one or more entrepreneurial initiatives in the territory of the Municipalities aimed at strengthening the local productive fabric and attracting new investments. The access procedure envisaged a call for tenders to determine the starting ranking for the preliminary phase,

through the use of objective parameters that allow for a univocal application such as employment growth, priority economic sectors.

In particular, the Agreement in question provided for the extension of the ATECO codes admitted to the Ateco trade and construction codes, in compliance with the limits imposed by EU and national legislation, in particular regarding the restrictions on the use of investment assets; the finalization of the employment program also to the maintenance of the number of employees (not obligatory to increase the number of employees); the specific definition of the pool of workers to be relocated; diversification of the percentage mix of subsidies with the following methods: subsidized loan between 30% and 50% of eligible investments.

The percentage of the subsidized loan requested is indicated by the beneficiary when submitting the application. The maximum amount of the contribution to the plant account and any direct contribution to the expenditure is determined, in relation to the amount of the subsidized loan, within the limits of the maximum aid intensities provided for by the GBER Regulation, it being understood that the sum of the subsidized loan, the contribution to the plant account, any direct contribution to the expenditure and any participation in the share capital cannot exceed 75% of the eligible investments. Finally, the Agreement provided for the application of the *de minimis* Regulation for productive investment programs.

When we talk about *de minimis* aid, reference is made to the fact that the EU system of state aid to companies provides for certain limits, which are derogated from for aid of lesser importance (so-called de minimis, of a small amount), as considered not capable of distorting free competition within the common market and exempted from the obligation of prior notification to the Community Authorities, envisaged by the provisions of the Treaty establishing the EC. Therefore, a specific rule has been established (the so-called de minimis rule) for which the limits do not apply if the overall benefit does not exceed, within 3 years, a predefined threshold of € 200,000 (€ 100,000 for the sector road transport), below which the aid is exempted from the aforementioned obligation.

To verify whether the threshold is exceeded, each time a company receives de minimis aid, it must recalculate the amount of aid granted in the previous three years, taking into account any aid (state or regional) granted as de minimis minimis. If the thresholds are exceeded, the ordinary obligation of prior communication for the entire amount of the aid returns. To establish the moment of granting the de minimis aid, for the purposes of calculating the ceiling and in relation to the three-year period to be considered, it is necessary to refer to the date on which the beneficiary company is granted the right to receive the aid, which must be identified with the provision for the assumption of the legally binding commitment (generally the concession deed). The de minimis rule does not apply to:

- aid for which it is not possible to calculate the gross grant equivalent without the need to carry out a risk assessment (so-called non-transparent) (art. 4 EU Reg. 1407/2013);
- enterprises operating in the fishing and aquaculture sectors (EU Reg. 717/2014), in the primary production of agricultural products (to which a

different regulation, EU Reg. 1408/2013 applies), in the processing and marketing of agricultural products (only in particular cases);

- export-related activities;
- aid conditional on the preferential use of domestic products over those imported.

The second example is the last Program Agreement signed on 22 July 2020.

In particular, the Leather-Footwear District of Fermano-Maceratese was recognized as a complex industrial crisis area due to the problems linked to the crisis that hit the sector. The Crisis Area includes 42 Municipalities[22] (DM 12 December 2018) falling within the local labor systems of Civitanova Marche, Fermo, Montegiorgio, Montegranaro, Porto Sant'Elpidio and the Municipalities of Corridonia and Tolentino. With the Program Agreement of 22 July 2020, the Ministry of Economic Development, the National Agency for Active Labor Policies, the Ministry of Infrastructure and Transport, the Marche Region, the Province of Fermo, the Province of Macerata and Invitalia are committed to implementing the Industrial Reconversion and Redevelopment Project (PRRI) of the area. The Project, developed and coordinated by Invitalia, has the purpose to:

[22] In particular, the crisis area includes 42 Municipalities broken down as follows:
SLL Civitanova Marche: Civitanova Marche, Montecosaro, Morrovalle, Potenza Picena;
SLL Fermo: Altidona, Campofilone, Carassai, Fermo, Lapedona, Monte Urano, Monte Vidon Combatte, Monterubbiano, Moresco, Pedaso, Petritoli, Porto San Giorgio;
SLL Montegiorgio: Belmonte Piceno, Falerone, Francavilla d'Ete, Grottazzolina, Magliano di Tenna, Massa Fermana, Monsampietro Morico, Montappone, Monte Giberto, Monte San Martino, Monte San Pietrangeli, Monte Vidon Corrado, Montegiorgio, Monteleone di Fermo, Montottone, Penna San Giovanni, Ponzano di Fermo, Rapagnano, Servigliano, Torre San Patrizio;
SLL Montegranaro: Monte San Giusto, Montegranaro; SLL Porto Sant'Elpidio: Porto Sant'Elpidio, Sant'Elpidio a Mare; Municipalities: Corridonia and Tolentino.

- promote the relaunch of the manufacturing sector, with particular reference to the footwear sector, through the consolidation of existing companies, production diversification, the promotion of new investments, the aggregation of companies and support for production chains;
- develop the tourism sector;
- support the agri-food sector;
- foster an ecosystem of innovation for digital manufacturing and new craftsmanship;
- strengthen the provincial road network and consolidate and expand specific connecting arteries;
- encourage the re-employment of workers belonging to a specific reference basin.

The aim is therefore to strengthen the existing productive fabric, attract new investments, support the re-employment of workers expelled from the labor market and identify a localization offer made up of national incentives; regional incentives (incentives for productive investments, innovation and research); active labor policies (employment support and training courses); industrial areas immediately usable by investors; infrastructure; networking with the credit system; information services. The Agreement favors entrepreneurial initiatives that are capable of determining a significant return in terms of market prospects and the re-employment of workers affected by the crisis. The intervention of the Marche Region is aimed at production expansion/diversification programs, digital transformation projects of production processes and innovation of micro and

SMEs operating in the manufacturing sectors, production services, hospitality and agri-food activities; projects for innovation and aggregation of cultural and creative, manufacturing, service, tourism and agri-food SMEs in supply chains; projects for the development of technological research platforms, resulting from the collaboration between companies, universities and research and technology transfer centers; to self-employment paths in favor of the unemployed; incentives for companies hiring the unemployed on a fixed or permanent basis; continuous training courses aimed at professional retraining; to training courses for the unemployed and/or unemployed; to provide work grants and research and training grants.

A further example of governance of the territory functional to overcome the crisis in the Marche districts is the measure presented with the press release of last March 18 gave the opportunity to companies to submit, from March 26, 2021, an application for the financing of digital transformation projects of production processes, with a view to the 4.0 Business Plan and the acquisition of specialized product, process, organizational and commercial innovation services. The support for the projects is intended for micro, small and medium-sized enterprises, with operational headquarters in one of the municipalities of the crisis area, belonging to the manufacturing sector, construction and some production services, tourism, with priority for the supply chain leather-footwear and for hospitality businesses. The facility consists of a non-repayable grant equal to 40% of the approved expenditure eligible for funding under the Temporary Framework adopted by the

European Commission for state aid to support the economy in the current Covid-19 emergency.

With another press release dated 10 June 2021, the Marche Region signed an agreement for the internationalization of businesses in order to recover lost ground, in one of the most difficult moments of recent decades for the development of trade and investments between Countries and the different macro economic areas. One of the ways to go, identified by the Marche, passes through a close collaboration with the ICE Agency, to ensure greater coordination between the interventions planned by the Region and the Made in Italy promotion activities managed by the Agency. The goal is to encourage the entry and strengthen the presence of the Marche production system of excellence on world markets. In the presence of the president Francesco Acquaroli, the vice president of the Region Mirco Carloni and (remotely) the general manager of Ice-Agency for the promotion abroad and the internationalization of Italian companies Roberto Luongo signed a three-year framework agreement for collaboration. The Marche the president recalled, are a small region with a great manufacturing history. We have always produced excellence, but, unfortunately, due to lack of infrastructures, we have always been penalized in the ability to assert ourselves on foreign markets. Today with the changing world, from globalization to digital, it becomes essential for us to systematize the energies and experiences we have gained to guarantee a future for our entrepreneurial system and to pass on the great skills we have acquired to the new generations.

The Marche contributes 2.5% to Italian exports, but can greatly improve their share thanks to the presence of production districts such as agri-food, footwear, furniture and the home system, mechanics and pharmaceuticals, sectors of importance essential for the region's exports. This Agreement is very concrete and aims to use all the activities and services, including digital ones, some of which recently made free, that the ICE has put in place in this period, despite the pandemic, to facilitate the presence of Italian companies on the foreign markets. The Framework Agreement aims to ensure greater coordination between the internationalization interventions of small and medium-sized enterprises (SMEs) planned by the Marche Region and the Made in Italy promotion activities managed by the ICE Agency. The agreement provides for the implementation of actions, activities, programs and projects to promote and attract investments. Specific projects and operational agreements will be coordinated between the two bodies which include incoming initiatives (missions in the Marche region by foreign operators), development of managerial and digital skills, educational tours, participation in trade fairs, presence of Marche-based companies on the Ice platform "Fiera Smart 365 "(for the management of digital fairs and virtual B2Bs), research and support for foreign investments in the Marche region, promotion and internationalization of innovative Marche start-ups.

The 2021-2023 Framework Agreement with the ICE Agency, to be implemented with specific agreements, represents one of the five actions envisaged by the Marche Region as part of the 2021 Internationalization Plan. The other interventions outlined concern participation in the main trade fairs in Italy and abroad, at Expo Dubai 2020, the activation of credit and financial instruments to support internationalization, analysis of the economic impact of the investments made. The importance of the agreement lies in the collaboration, technical and logistical assistance and, more generally, in the implementation of synergistic actions that embrace countless fields related to internationalization policies.

Last but not least, the possibility of having as a support base a network of 80 ICE offices around the world, through which the Region will be able to carry out countless activities. This is a close cooperation agreement, never stipulated before, between the Marche Region and the ICE which also implies an indirect collaboration with the Ministry of Foreign Affairs and Cooperation. With another Press Release dated 17 June 2021, the Marche Region announced that in order to encourage the regrowth and recovery of businesses in the area, various events dedicated to Start Up are organized in order to provide innovative answers to the new needs of the market. The Marche needs such an important boost to grow a new generation of protagonists for a new regional economy focused on innovation, knowledge and creativity.

The start-up is the real accelerator of the competitiveness of an industrial system that we want to grow in the Marche region. The Marche Region organizes various events to explain to recipients how to participate in the call, what it provides, what are the resources and when to participate. The goal is therefore to encourage the the Marche industrial districts to get back on track. For example, in the press release in question, dedicated to start-ups, the Region explains that, at the time of submitting the application.

In particular, companies must:

- possess the dimensional requirements of a micro or small enterprise;
- have been duly registered in the business register at the territorially competent Chamber of Commerce for no more than five years;
- have operational units on the regional territory at the time of payment of the contribution.

Furthermore, the Region specifies that a total amount of € 1,000,000 has been allocated for the implementation of the call, which can be integrated with additional resources in order to increase the effectiveness of the financial intervention and that the facilitation, in the case in question, it is granted in the form of a non-repayable grant to the extent of 60% of the expenditure allowed for the realization of the project. As we have seen, to combat the lack of cooperation between the various districts, the low investments in product and process innovation, the inability to control outlet markets, the lack of attention to changes in demand, the competition of some Asian productions and he Eastern Europe, the Marche region is organizing various events involving various companies, with the aim of quickly returning to shine.

3.3 RELATIONS WITH THE OTHER ITALIAN DISTRICTS

As seen in the previous paragraphs, among the causes that led to the decline of the Marche districts and, in general, of the Italian districts, there is the poor cooperation, the low investments in product and process innovation, the inability to control the outlet, lack of attention to changes in demand, competition from Asian and Eastern European productions, the lack of specialized professionals.

Around 2010, the Italian industrial districts took a breather after the negative economic situation that had affected the demand for Made in Italy products. In fact, in 2009, the collapse of international trade penalized district trade, even if the share of exports compared to the Italian total did not substantially change its trend, already in a very slight decline in the pre-crisis period. Otherwise, the foreign sales of the companies belonging to the district core business sectors did not lose positions. Beyond the crisis, however, it is difficult to see a real recovery, a substantial change and a driving force that brings the production system back to the positions prior to 2008. Although the most acute phase of the recession is now behind us, today the signs of a robust recovery can be seen but are not yet definitively systemic. In particular, the increasingly evident intersections between the organizational modality of the district and other formulas of network aggregation between companies, the rooting of each district in the territory and in the local community of reference, the capacity of resilience of the district model, understood as a natural network and complex of production and collaboration between companies, the projection on foreign markets.

Over the years *"the competitive capacities of the production districts seem to have largely faded, linked exclusively to the" proximity "territory as a generator of external economies, of agglomeration, such as to favor the productive and innovative efficiency of companies"* (Osservatorio dei distretti italiani, 2011).

The changes that have taken place in the main reference markets and the competition from emerging manufacturing economies seem to have further reshuffled the cards, such that the traditional organizational model of the district seems to lose the primacy gained and maintained throughout the 1980s and 1990s in the manufacturing landscape. Rather than a loss of competitiveness, however, it is necessary to speak of complex phenomena, not yet clearly definable in their essence. What is not yet possible to state is that the beginning of a widespread recovery is evident. In fact, if a large part of Made in Italy, especially the food sector, shows a propulsive thrust, the mechanics still reveal signs of fatigue.

Furthermore, if the districts of the Center and the North show signs of dynamism, the South still reveals many contradictions with accentuated difficulties in terms of employment. The focus on product quality and its marked characterization is no longer the only strategy widely spread among the district companies, as they are now competitive assets already acquired before the crisis phase of international demand. Today, Italy, unlike other states, is distinguished by the high number of active companies. In fact, Italian SMEs are the expression of an industrial development that highlights the capacity of the economic, institutional and social forces of a given territory.

The Italian industrial districts are homogeneous local production systems characterized by small and medium-sized industrial enterprises and highly specialized production, whose main districts are:

- fashion (Perugia cashmere district, Como silk factory, Montebelluna sportsystem district, Vicenza, Arezzo and Valenza Po goldsmith districts, Valdarno district and Solofra tanning district);
- mechanics (Turin automobile district, Emilia Romagna Motor Valley, Lombardy rubber district, Piedmontese taps district);
- agri-food (wine-growing districts of Piedmont and Veneto, Prosciutto di Parma and San Daniele district in Friuli, agri-food district of Nocera and Gragnano in Campania and that of Fara San Martino in Abruzzo);
- furnishings (district of Sardinian cork, that of Murano glass, of Civita Castellana ceramics).

As regards small and medium-sized enterprises in the Marche region, it should be noted that:

- they are active in demand segments where the local component has a certain importance;
- on the side of raw materials and semi-finished products, they depend on medium-large suppliers;
- they reduce production capacity in the least expensive way;
- they also tend to save in terms of expenses for handling goods (through new vehicles or modes of transport).

However, the fact that these companies are largely characterized by very small dimensions, unites these sectors for some no less important aspects: the reduced ability to organize a presence on the market that crosses local borders; low contractual strength towards suppliers; the reduced amount of financial resources and the inadequate ability to collect and process information (financial, technological, market) further increase uncertainty and do not allow investments to be made (Goffi, 2015).

SMEs in the Marche have a clear process of consolidation from the point of view of organizational structures and from the point of view of the number of employees. In the Marche half of employment is concentrated in micro-enterprises which play a decidedly important role, as in the rest of Italy (Goffi, 2015).

The Marche is the region in which the weight of manufacturing on total employment in Italy is greatest. This region has a multitude of industrial districts such as:

- furniture districts;
- districts of musical instruments;
- districts of the hat;
- agro-industrial districts;
- multisectoral districts;
- footwear districts;
- appliance districts.

The comparison with Veneto, Emilia Romagna and Tuscany, regions with a production structure similar to that of the Marche region, shows how, despite the crisis, manufacturing still plays a very important role in the Marche. Compared to other Italian regions, in fact, the number of employed in services and industry has not changed. Due to the pandemic, the industrial districts of the Marche region (District Observatory, Intesa San Paolo, 2021):

- they recorded a drop in exports of 18.6%;
- have reached 3,382 million euros in exports, for a decrease of 18.6% compared to the previous year.

Today the Marche region is the first in terms of number of cultivated hectares and, as such, aims to present itself as a single entity, to have a greater weight on the Italian and international market at a promotional and commercial level (District Observatory, Intesa San Paolo, 2021). The goal is also to become a territorial brand that identifies organic products par excellence, through territorial marketing and promotion that enhance the product. Moreover, even for the Marche region, incentives for Research and Development are increasingly necessary today. In this sector, in fact, investments see Italy in one of the lowest positions in the European ranking but also in that in which all the most industrialized countries are present. In fact, after the crisis suffered by the pandemic, for the relaunch of the industrial districts of the Marche region, the region requires investments in innovation and digitalization, environmental sustainability and internationalization. Notably, investments in digitization are crucial to increase the attractiveness of the territory but also to allow an enhancement of the offer of companies on global markets.

CHAPTER FOUR

ANALYSIS: SOLUTIONS AND PROPOSALS

4.1 CONJUNCTURAL ANALYSIS

This chapter shows the trend for the first half and second half of 2021, analyzing the situation of the Marche industrial districts and making a relationship between the Marche districts and the other Italian districts and between the Marche districts and those abroad. In addition, the solutions and main proposals are analyzed to encourage the recovery of the industrial districts of the Marche region. For the Marche region, 2021 begins with positive data for exports, which is + 3.3%. 5 out of 9 districts started the year with growth, four of which are already above the export levels of the first months of 2019. As for the individual districts, the Home System stands out, where both the district of extractor hoods and household appliances stand out in double figures. Fabriano (29.5%) and Pesaro's Cucine (+ 11.5%), both districts have largely exceeded the pre-Covid levels of the first quarter of 2019 (respectively + 9.5% and + 14.3%). Excellent results also for machine tools and wood in Pesaro (+ 13.6% the trend change and + 4.7% compared to the first quarter of 2019), musical instruments in Castelfidardo (+ 12.2%, +19, 3% compared to 2019). The Fabriano paper factory also did well (+ 5.7%), which however is still below the pre-Covid levels of 2019 (-6.2%).

Exports of the districts of the Fashion System are in great difficulty (-9.4%), all down compared to the first three months of 2020: Footwear di Fermo (-8.2%),

Marche clothing (-4.9%), Tolentino leather goods (-24.2%) and Montefeltro jeans valley (-0.6%). All very far from the levels of the beginning of 2019.
The export trend on mature markets was good (+ 4.8%), thanks to the driving force of France and the United States. The increase in sales on new markets was more slight (+ 0.9%), where the excellent results obtained in China, Saudi Arabia and the United Arab Emirates were almost completely offset by the reduction in Lithuania, South Korea and Romania. The recovery in exports, which for some districts of the Marches comes after several quarters of decline, confirms the recovery trend of economic indicators. At this stage, there is no sector that is not involved in the digitization and green transition process and in the first six months of the year 350 million of new medium-long term credit was disbursed to companies in the Marche region. The trend in mature markets was good, thanks to the driving force of France and the United States. The new markets are growing strongly, supported by the excellent results obtained in China, Poland and Russia.
Therefore, in the first half of 2021 the export of industrial districts recorded a jump of 27.6% at current prices compared to the same months of 2020, heavily penalized by the spring lockdown due to the Covid-19 pandemic (Intesa San Paolo district monitor 2021).
The comparison with 2019 shows an increase of 0.7% (equal to 474 million euros) and the achievement of new record levels of 64.6 billion euros.

The recovery is widespread in all territories: out of a total of 158 monitored districts, 101 in the second quarter are above the levels of 2019.

Among the most dynamic district sectors are:

- household appliances: + 29% the change compared to the first six months of 2019;
- metallurgy: + 22.2%, also driven by the increase in production prices;
- agro-food: + 14.9%;
- construction and the home system, led by the districts specialized in Furniture (+ 8.2%) and Building Products and Materials (+ 6.7%), which beat German competition (+ 6.3% and - 0.8%).

Also in comparison with the first six months of 2019, exports of Other intermediate products (+ 4.5%) and Metal products (+ 2.1%) closed with a slight increase, while Mechanics recorded a slight decline (-1.6%) and in any case lower than the German competitors (-3%) (Monitor of Intesa San Paolo 2021 districts).

Signs of recovery also emerge for the fashion system which shows a rebound compared to 2020 (especially for consumer goods, up by + 38.4%), but is still lagging behind 2019 in the intermediate sector (- 29, 3%).

In Italy, the acceleration of district exports of the North-East stands out (+ 4.2% the change compared to the first half of 2019), where Friuli-Venezia Giulia was highlighted for dynamics (+ 15.6%) and the 'Emilia-Romagna and Veneto due to the increase in export values (+443.7 million and +324.9 million respectively). Abroad, on the other hand, Germany, China, the United States and Ireland are the markets in which the export of the districts recorded the greatest growth in value.

In the second quarter of 2021, the export of industrial districts recorded a jump of 55.6% at current prices compared to the same months of 2020, heavily penalized by the spring lockdown. At the half-yearly level, progress was equal to 27.6%. The comparison with 2019 shows an increase of 0.7% (equal to 474 million euros) and the achievement of new record levels of 64.6 billion euros.

The recovery is widespread in all territories: out of a total of 158 monitored districts, in the second quarter 145 recorded an increase compared to the same period of 2020 and, above all, 101 are above the levels of 2019.

Among the most dynamic district sectors are:

- household appliances: + 29% the change compared to the first six months of 2019;
- metallurgy: + 22.2%, also driven by the increase in production prices;
- agro-food: + 14.9%.

  Among the top five districts for growth in export value between the first six months of 2019 and the same period of 2021, three are specialized in these sectors: the Metals of Brescia (+438 million euros which is equivalent to +21.2 %) and Home Appliances from Inox (+236.5 million and + 34.4%) lead the ranking, while Alimentare di Parma is in fifth place (+148.7 million and + 34.7%);
- construction and the home system, led by the districts specialized in Furniture (+ 8.2%) and Building Products and Materials (+ 6.7%), which beat German competition (+ 6.3% and - 0.8%).

In Italy, Pordenone was highlighted in the wood and furniture sector, which in the first half of the year exceeded 600 million, with an increase of 151.7 million compared to the same period of 2019 and an increase of 33.6 %. The Sassuolo tiles were also brilliant with growth of 168.8 million euros, placing themselves in third place for the increase in value of exported values, ahead of Pordenone. Again in comparison with the first six months of 2019, exports of Other intermediate products (+ 4.5% thanks above all to the contribution of Plastics from Treviso, Verona and Padua) and Metal products (+2, 1%), while Mechanics recorded a slight decline (-1.6%) and in any case lower than its German competitors (-3%). A high variability of results was recorded in Mechanics, with some districts already beyond the pre-crisis levels (Instrumental Mechanics of Bergamo, Termomeccanica of Padua, Agricultural Machinery of Reggio Emilia and Modena, Mechatronics of Reggio Emilia, Agricultural Machinery of Padua and Vicenza) and others later (Instrumental Mechanics of Milan and Monza, Machine tools and industrial robots of Turin, Instrumental Mechanics of Vicenza, Mechatronics of the Bari area). Signs of recovery also emerge for the fashion system which shows a rebound compared to 2020 (especially for consumer goods, up by + 38.4%), but is still lagging behind 2019 especially in the intermediate sector (- 29.3%). The gap is more contained for consumer goods (-10%), where two goldsmith poles, Arezzo and Vicenza, have already emerged beyond the pre-Covid levels (+ 12.8% for both), Empoli clothing (+ 3.3%), Carpi knitwear and clothing (+ 10.5%), Verona footwear (+ 8.1%) and Montebelluna sports footwear and sports system (+ 0.7%)) (Monitor of Intesa San Paolo 2021 districts).

Abroad, Germany, China, the United States and Ireland are the markets in which the districts' exports recorded the greatest growth in value. The balance of the first half is instead strongly negative for direct flows in Switzerland (-15.1%), where the difficulties of the fashion system weigh, and in the United Kingdom (-16.8%) which is affected by the decline in Agro sales. food and above all consumer goods of the fashion system.

Several factors may have influenced the evolution of Italian products on the English market: the measures to fight the virus, the uncertainty of Brexit which had led to an accumulation of stocks in view of the end of the transition period and in the fear of the “no- deal”, non-tariff barriers (such as additional documentation required for non-EU trade).

In Italy, the acceleration of district exports of the North-East stands out (+ 4.2% the change compared to the first half of 2019), where Friuli-Venezia Giulia was highlighted for dynamics (+ 15.6%) and the 'Emilia-Romagna and Veneto due to the increase in export values (+ 443.7 million and +324.9 million respectively). In third place for contribution to the growth of flows exported from the Italian districts was Lombardy (+194.5 million euros).

In Friuli-Venezia Giulia, as we have seen, the performance of Pordenone Wood and Furniture was brilliant, thanks to the furniture sector, which doubled sales in the United States, and the panels and doors that quadrupled the number of doors in Germany. levels compared to pre-Covid. On the other hand, Manzano's chairs and tables are still slightly behind their pre-Covid levels and have been most affected by the slowdown in demand from the United Kingdom and contract orders for hospitality and catering.

The balance for the other districts of the Region was also positive: Friuli wines and spirits (+ 4.9%) thanks also to the recovery in Germany, managed to offset the halving of flows suffered in the United Kingdom; Prosciutto di San Daniele (+ 14.7%) and Caffè di Trieste (+ 0.9%) recorded sales increases, especially in more distant markets. In Veneto 20 out of 27 districts are already beyond the pre-Covid levels. The electrical appliances of Treviso, the Plastics of Treviso, Vicenza, Padua stand out for their performance, responding to the demand of several rapidly growing sectors such as packaging and packaging, construction and furniture, the Vicenza Goldsmith's shop which is recovering momentum from the market of historical tradition of the United States, the Termomeccanica of Padua which has seen a triple sales to Russia and the Carni di Verona driven by Germany, France and Poland. The Veneto home system districts are experiencing a positive moment on foreign markets and have all recovered the levels of 2019: marble and granite from Valpolicella stand out for their dynamism and for the importance of export levels, wood and furniture from Treviso. Among the Metalworking districts, the Agricultural Machinery of Padua and Vicenza and the Termomeccanica Scaligera return to pre-Covid levels, while the Mechanical Engineering of Vicenza is still lagging behind on the primary markets of Germany and the United States (Monitor of the Intesa San Paolo 2021 districts).

The recovery appears even more evident for the districts that belong to the sectors that have been least penalized by the pandemic such as the Bicycles of Padua and Vicenza, the Veronese Graphic, the Veronese Sweets and Pasta, the Veronese Wines and Prosecco. In the fashion system, the Veronese footwear and the sports footwear and sports system of Montebelluna give positive signs of a return to pre-pandemic levels, while the Tanning of Arzignano, the Eyewear of Belluno, penalized in the part of the sunglasses, are still lagging behind. and above all the footwear of the Brenta, the textile and clothing of Treviso, the textile and clothing of Schio-Thiene and Valdagno. In Emilia-Romagna, the Mechanics districts stood out (+ 1.6% compared to the first half of 2019), and above all those of the Agro-food sector (+ 16.8%) and the Home System.

In particular, the evolution of upholstered furniture in Forlì stands out (+ 55.7%), by far the best wood-furniture district in Italy, thanks to the driving force of the French and Chinese markets, and the dynamics of Sassuolo tiles. Also in the fashion system there was a growth in the overall export of the districts (+ 28.4%), but not enough to recover the levels of 2019 (-16.4%). In Lombardy, 10 out of 23 districts have reported above the pre-Covid levels.

In particular, some districts of the metalworking chain stood out, such as:

- the Metalli di Brescia, pushed, as we have seen, also by the increases in producer prices;
- the instrumental mechanics of Bergamo;
- the metalworker of the lower Mantua area;
- the rubber and plastics districts, which have recovered to pre-pandemic levels: these are the rubber from Sebino Bergamasco and the rubber and plastic items from Varese.

The performance of the home system was positive, benefiting from the growing attention to the domestic environment induced by the pandemic. All the districts are located on levels higher than the pre-pandemic period: the Wood and

Furniture of Brianza, the Taps, valves and cookware of Lumezzane and the Wood of Casalasco-Viadanese.

The agro-food supply chain also did well overall thanks to the towing of the dairy districts of south-eastern Lombardy and the Meat and cured meats of Cremona and Mantua. On the other hand, the districts of the fashion system of the Region are still lagging behind (Textile and Clothing of Val Seriana, Clothing-Textile of Gallarate, Silk-Textile of Como, Hosiery of Castel Goffredo and Footwear of Vigevano). In the districts of the South (+ 0.5% compared to the first six months of 2019) there is a great variability of results: Campania, Sicily and Sardinia are beyond the pre-COVID levels, while Basilicata has not yet fully recovered, Abruzzo and Puglia. The regions of the Center are still lagging behind, penalized by a strong specialization in the fashion system.

In Tuscany, the export of the districts is however approaching pre-crisis levels: in the first half of 2021 it exceeded 10 billion euros with a gap compared to 2019 which fell to -2.1%. The Agro-food and Means of Transport sectors show export values that are much higher than the corresponding period in 2019 with leaps of + 20.8% and + 38.7% respectively (Monitor of Intesa San Paolo 2021 districts).

In the agro-food sector, the Florovivaismo of Pistoia and the wines of the Florentine and Sienese hills stood out, while in the means of transport both the Nautica of Viareggio and the Camperistica of the Val d'Elsa shone.

The supply chains of the fashion system (where, however, as we have seen, the Arezzo Goldsmith's and Empoli's Clothing are in contrast), the home system,

mechanics and the papermaking district have not yet filled the gap generated by the pandemic. di Lucca which, however, had had a positive trend in 2020.
In the Marche the delay compared to the pre-crisis levels was equal to -8.1%, due to the difficulties of the districts of the fashion system, only partially recovering in the first half of the year. Among these, the main district of the Region stands out, the Footwear of Fermo which shows a decrease of 155 million euros compared to the first six months of 2019 (Monitor of the Intesa San Paolo 2021 districts).
On the other hand, the performance of the districts appears better which, together with the machine tools and wood of Pesaro and the musical instruments of Castelfidardo, are already beyond the pre-Covid levels. In the second half of 2021, district exports should have maintained a good pace of growth on foreign markets, thanks to the presence of favorable international demand conditions. 2021 closes with new record levels. In this context, increases in commodity prices and interruptions in supplies will represent two points of attention, which could slow down the momentum of world demand. However, in the medium term the possible and connected revision of global value chains in favor of the reallocation of the supply chains on a continental basis could also benefit the Italian district producers.

4.2 WHAT ARE THE SOLUTIONS?

The assessments on the impossibility of re-establishing the well-being that, in the past, characterized industrial districts are realistic as they consider the trends of competition and demand as difficult conditions. In recent years, the dynamics of demand and competition show unpredictable and fast evolutions, in such a way as to think that improvements can materialize, even if in ways that cannot be easily understood.

In the Marche region on the one hand we are witnessing a degraded production system with the disappearance of the conditions for which life choices can also produce real prospects of economic improvements, on the other hand there are some elements that have never deteriorated, such as for example, tourist attractiveness, social cohesion, cultural tension and ecological balance. Therefore, the working and entrepreneurial nature of the Marche has lost ground but the cultural and social one has not been impoverished. The affirmation that *"the new economy, one that reflects the energies and abilities of a new generation, has not yet been born, although it is realistic and draws too much confirmation from the available statistics, could soon prove to be superseded when it was possible to understand who the new entrepreneurs who alternate just as many with those who go out of business, in which sectors and in which combinations of sectors they have decided to try their hand, because so few join the trade associations of micro and small enterprises, which guidelines are able to draw from the great habit that not only the youngest of them have with information technologies and advanced knowledge tools"* (Dini, 2015).

Among these instruments there are also the economic and financial ones that should prevent new entrepreneurs from being exposed to the risks and inconveniences associated with investment decisions that are too marked in the orientation towards the growth of production quantities. *"As happened in the*

recent past, when in the districts of the region (and not only in the Marche) the acquisition of new (often to be understood: of further) plants and machinery took place systematically, stimulated not only by the fortunes of the districts but also by the policies to support innovation through the diffusion of the machinery that presumably incorporated them" (Dini, 2015).
The crisis has found many micro-enterprises equipped with machinery suitable for producing quantities that will never be required again; and the impossibility of decommissioning such machinery due to the cost necessary for the dismantling and the collapse of their value. So the same companies have continued to declare for years, to the interviewers of the economic analyzes, that their production capacity is largely underutilized, under the illusion that it is still usable in the future and perpetuating their condition of organizationally and culturally outdated entrepreneurial realities, which survive by eroding capital. family members accumulated previously (Dini, 2015).
The new entrepreneurial connotation of the Marche region, which is shaped by strong schooling and the decisive orientation to new information technologies, which will no longer fall into those traps and will be able to seize new market opportunities, is probably already forming and gaining strength, but still leaves observers uncertain about its size and robustness.
In fact, as seen in the previous paragraph, in 2021 the exports of the districts of the Fashion System are still in great difficulty, all down compared to the first three months of 2020, and the exports of the districts of the Fashion System: Footwear of Fermo, Clothing of the Marche region, Tolentino leather goods and Montefeltro Jeans valley.
Although 2021 actually starts with some positive data such as:

- the Home System, where both the Fabriano range of extractor hoods and household appliances and the Pesaro kitchens are growing by double figures, both districts have largely exceeded the pre-Covid levels of the first quarter of 2019;

- the machine tools and wood of Pesaro, the musical instruments of Castelfidardo;
- the Fabriano paper shop, which however is still below the pre-Covid levels of 2019.

As for the solutions to the causes that led to the decline and therefore to the relaunch of the Marche district production systems, some actions are necessary, such as:

- combining industrial policies with innovative practices and organizational forms of territorial development of the districts. Universities, public and private research centers and professional communities play a fundamental role in the innovation of local productive fabrics;
- safeguard employment levels in the territory of the Marche municipalities recognized as areas of industrial crisis;
- develop forms of intelligent governance, capable of responding to the challenges of global markets. In these markets, the attractiveness of additional investments is totally linked to the institutional capacity to reduce transaction costs;
- resume the internationalization of companies: to do this it is necessary to increase the size of companies but also the entrepreneurial factor.

From a social point of view, the complexity of the development of the territory is linked to demographic factors, such as the aging of the population or immigration, as they limit themselves to outlining scenarios in which the quality of life will be increasingly determined by an institutional contribution in terms of policies capable of promoting social inclusion and cohesion.

4.3 WHAT COULD BE DONE?

Industrial districts have faced several crises over the years. Empirical evidence (Humphrey, 1995; Nadvi and Schmitz, 1999; Rabellotti, 1997) shows that small district businesses in developed countries but also in developing countries are able to overcome some of the main limitations usually found to face (Dini, 2015).

It must be said that the crisis that the industrial districts went through was not a crisis like all the others, not only for its long duration, but for a whole series of changes of historical proportions that have occurred in recent decades, including technological ones (Dini, 2015).

In the previous chapters, the impacts of the crisis on the local socio-economic fabric that have contributed to the decline of a consolidated production model have been analyzed; the importance of craftsmanship within the Marche production structure; the dynamics of recent years in the four main sectors of artisan manufacturing, which correspond to the districts in which the vast majority of businesses and manufacturing employment are concentrated: mechanics, footwear, mobile wood and textile clothing; the development of the industrial districts of the Marche region by examining the years that favored the growth of small and micro enterprises increasingly specialized in the individual production phases and the various sectors of greater importance in the region; the difficulties of the industrial districts of the Marche analyze the causes that led to the crisis of the districts.

At this point one wonders what the industrial districts of the Marche could do to be able to change their production system?

As mentioned in the previous chapter, for the relaunch of the Marche district production systems, the region intervened with various territorial agreements, program agreements and provisions with the Ministry of Economic Development and the National Agency for the Attraction of Investments and Development of Enterprises (Invitalia SpA). The purpose is to:

- promote the realization of one or more entrepreneurial initiatives in the territory aimed at strengthening the local productive fabric and attracting new investments;
- promote the relaunch of the manufacturing sector, with particular reference to the footwear sector, through the consolidation of existing companies, production diversification, the promotion of new investments, the aggregation of companies and support for production chains;
- develop the tourism sector;
- support the agri-food sector;
- promoting an ecosystem of innovation for digital manufacturing and new crafts;
- strengthen the provincial road network and consolidate and expand specific connecting arteries;
- favor the reintegration into work of workers belonging to a specific reference basin;

- promote the internationalization of industrial districts in order to recover the lost ground to facilitate the entry and strengthen the presence of the Marche production system of excellence on world markets.

It is precisely internationalization, that is the expansion of industrial districts outside their own national market, that is lacking in the industrial districts of the Marche region.

To undertake this process, the industrial districts of the Marche should carry out three phases (Arcuri, 2018).

The first phase consists of the entry of the industrial district into the foreign market, in which the company defines the operating method by which to enter the foreign market; the second phase is the settlement, in which the company deepens the competitive strategy to be implemented in the foreign market; the third and last phase is the second expansion, in which a definitive consolidation of the competitive position is sought (operate and support companies during the internationalization process; among the main ones Arcuri, 2018).

There are several entities that are: the Agency for the promotion abroad and the internationalization of Italian enterprises, the Regions, c) Regional branches for the internationalization of enterprises (SPRINT), the Italian Society for enterprises abroad (SIMEST), the foreign trade insurance services (SACE), the financial institution for entrepreneurs of the North East (FINEST).

The legal forms by which an industrial district can "internationalize" are mainly three: the representative office, the permanent establishment or the company. It is possible to operate abroad with a stable presence or without a stable presence. In the first case, permanent presence means through a permanent establishment or branch; in the second case, reference is made to a representative office, agents or independent distributors.

The representative office:

- it is the modality that involves lower set-up costs and from which fewer statutory obligations arise; in fact, the registration of the local unit in the Chamber of Commerce of the foreign state of settlement is sufficient;
- being a subject without legal and fiscal autonomy with respect to the parent company, in the foreign State it does not give rise to tax obligations but its costs are usually fully deductible for the parent company;
- must be reported by the legal representatives of the foreign company, also through a specially designated special attorney, to the Business Register for registration in the so-called Economic and Administrative News Repertoire (REA), after requesting a tax code from the Tax Agency Enter competent according to the place where the representative office opens.

Therefore, while the representative office represents one of the possibilities of operating abroad without a stable presence on the part of the company that wants to internationalize, the permanent establishment instead constitutes a stable presence abroad.

For the internationalization of an industrial district, in addition to the representative office and the permanent establishment, one of the most complete ways of settling abroad is the possibility of setting up a subsidiary company. A foreign company, even if controlled by the Italian parent company, must have its own decision-making and management bodies. Foreign subsidiaries or associates resident or located in tax havens are subject to the discipline of the so-called controlled foreign companies (CFC), which provides for the taxation for transparency by the Italian company of the income realized by foreign subsidiaries or associates that do not demonstrate the effective performance abroad of an economic activity or alternatively that the participation does not have the effect of localizing the income in the so-called black list states.

Another method to realize the internationalization of an industrial district is the joint venture contract which concerns a collaboration between two or more companies with the aim of setting up a new company in a sector of common interest or for the joint performance of some entrepreneurial activities. The legislative interventions aimed at financing and promoting joint ventures are numerous. For example, at the national level, Law no. 100 of 24 April 1990, aimed at promoting the establishment or participation in joint ventures abroad by Italian operators in countries not belonging to the European Union and law no. 19 of January 9, 1991, the institutes, respectively, of the publicly owned companies SIMEST and FINEST which have the task of assisting and providing advice to companies on all aspects relating to internationalization. On 29 January 2016, SIMEST and the National Council of Chartered Accountants and Accounting Experts signed an agreement to allow the expansion of professional consultancy services for internationalization. As it can be seen, throughout the national territory, the bodies operating for the promotion and support of industrial districts in the internationalization process are numerous as well as the branches and desks that provide advice to those who want to "internationalize" their business in order to to recover the lost ground to facilitate entry and strengthen the presence of the production system of excellence on world markets.

Furthermore, in order to internationalize the industrial districts, the Marche region should increase the size of the companies but also the entrepreneurial factor.

The internationalization of industrial districts is the result of the adoption of a series of strategies through which a company participates in globalization, i.e. the way in which the company projects its activities, totally or partially to an international environment and generates trade, financial and knowledge flows between different countries.

The internationalization process must answer the following questions:

- why is it important to talk about the internationalization of the company?
- what are the internationalization strategies?
- what are the effects of the internationalization of the company?

The growing phenomenon of globalization, supported by the development of new technologies and the continuous processes of economic liberalization and sectoral deregulation in many countries, are generating a new economic and entrepreneurial environment, to which Italian companies are no stranger.

In this sense, the current process of globalization requires a profound reflection on the new entrepreneurial reality and its constituent elements.

The International Monetary Fund (IMF) states that globalization is the accelerated integration of the world economy through trade, production, financial flows, technological diffusion, information networks and cultural currents (IMF, 2002).

In this globalized context, one of the most relevant strategies from the point of view of business management is internationalization, that is the decision of the company to turn to markets outside its geographical location of origin.

Smith, Ricardo and Mill laid the conceptual foundations for the classical theory of international trade, in which countries tend to specialize to produce goods and services with lower production costs.

Among the relevant factors of internationalization are:

- trade liberalization.

  Its objective is to open up new markets, achieve greater business competitiveness, coordinate economic policies and benefit from economies of scale;
- innovation and technological development.

  The investment in research and development (R&D) obliges companies to be at the forefront of products and services destined for very competitive markets: R&D are among the key requirements of international success. Innovation constitutes a considerable comparative and competitive advantage for companies in global markets;
- the transfer of value chains.

  It originated from the unbundling of production processes which led to delocalization;
- the economic approach to internationalization.

It has led to a progressive regional integration of states, creating a legal security framework that allows the development of economic activity without great uncertainties.

These factors have allowed industrial districts to compete on all markets and consequently increase their strategies in the world.

Unfortunately, there are several industrial districts that prefer to avoid internationalization. In particular, as regards to the industrial districts, the lesser importance of productive internationalization compared to commercial internationalization can be interpreted in different ways (Bank of Italy, 2006):

- organizing production in a foreign country is usually much more expensive than simply selling it;
- for many small and medium-sized district businesses, the fixed costs required to invest abroad can be a difficult obstacle to overcome;
- in the absence of a movement of the entire production chain, which may prove difficult to achieve, the incentive to go abroad may be limited for a district company, typically linked to the territory of origin.

CONCLUSIONS

This contribution was aimed at providing an overview on the Italian district of the Marche focusing on its rise and decline. In this respect, the analysis has allowed to come up with various potential solutions to solve the crisis of the district. As we have seen, investments in environmental sustainability, internationalization and digitalization are required for the relaunch of industrial districts. While for the first two, the Marche region is on track as it has already implemented various development processes, digitization is still being discovered and being developed. In my opinion, investments in digitalization, which are important for increasing the attractiveness of the territory but also for allowing an enhancement of the offer of companies on global markets, encounter an insufficient contribution from large companies to the innovation of production processes, a low propensity for the structure productive to absorb highly scientifically qualified work and also the brain drain in the most innovative countries and which reward the contribution of research activities. Surely in the past (not very distant), digitization has been seen in completely negative terms or even a threat as it can modify the elements characterizing the success of the districts and territorial systems and destroy the integration and competitiveness of the district given the ease in crossing the borders of the same. An example could be given by the fact that digitization has led to the reduction in the number of employees within the various industrial districts caused by the introduction of robotics and artificial intelligences that threaten work, especially manual or routine work. Fortunately, the ideal of digitization in a completely pessimistic way can be seen as an outdated meaning as, in my opinion, we realize that the digitization of production processes would allow the introduction of the best digital technologies within industrial districts process, but above all to innovate its business offer to the market. It would therefore lead to an evolution capable of implementing the virtual business model that could facilitate the establishment of networks of virtual companies, potentially able to favor the aggregation of a very fragmented industrial system. It is therefore necessary that the industrial districts of the Marche accelerate the digital transformation and promote competitiveness through the adoption of innovative solutions. To do this, a very demanding spending plan is needed. Unfortunately, the fabric of our country consists of many micro, small or medium-sized enterprises often unable to compete in terms of innovation and internationalization with more structured and larger enterprises. One of the possible solutions to increase the competitiveness of our companies while maintaining their own dimensional structure is the business network capable of enhancing their innovative capacity and investing in technologies that they could not afford on their own due to the small size of the company, thus increasing their competitiveness without giving up their individual legal autonomy. As a matter of fact, companies might maintain it, for instance, by building networks to ensure the presence of distribution services. Finally, it should be remembered that the old industrial districts have also not resisted the profound social changes such as education, consumption, new ethics of work. In other words, industrial districts have faced deep technological and cultural challenges throughout their existence.

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