

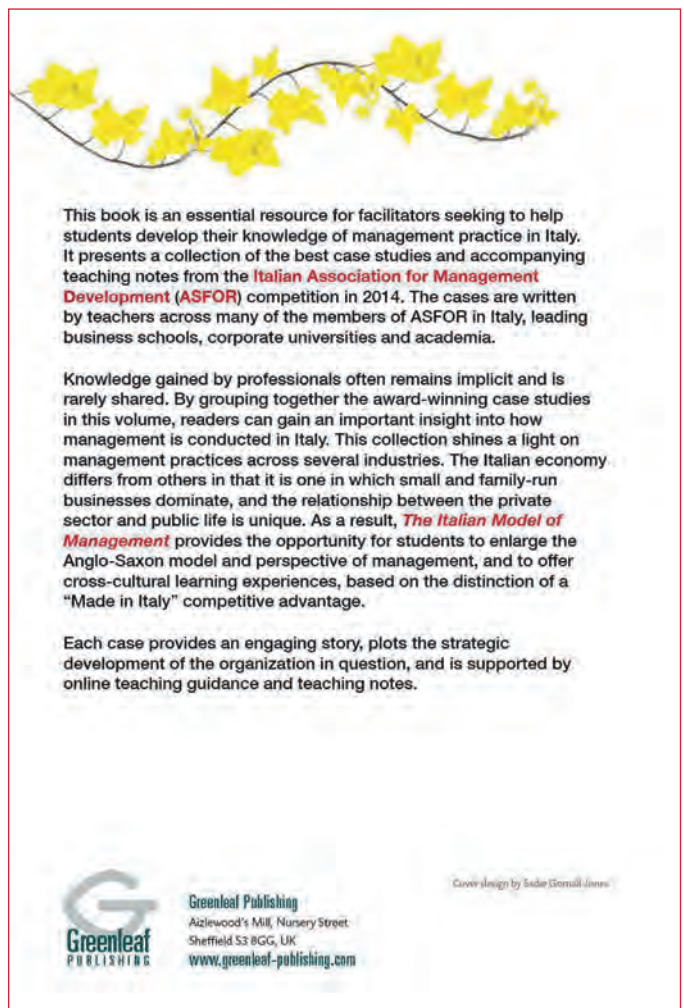
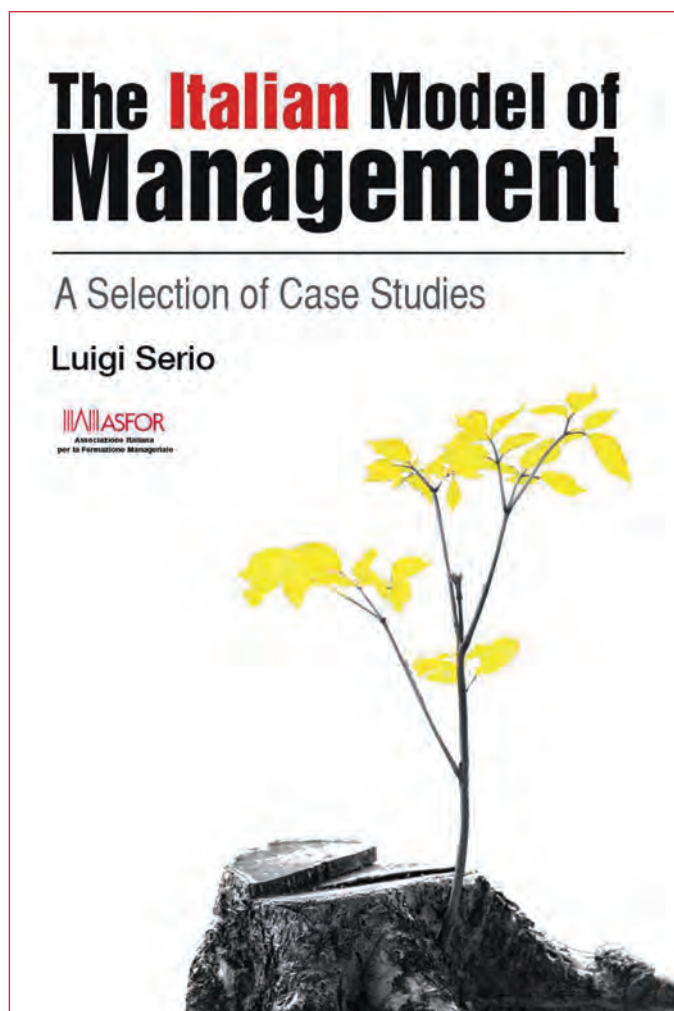
I^A EDIZIONE ASFOR – GSE RESEARCH/GREENLEAF PUBLISHING ANNUAL CASE WRITING COMPETITION

Mauro Meda,

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L'“ASFOR Annual Case Writing Competition” è un concorso che dal 2012 ASFOR ha lanciato per la selezione di nuovi casi aziendali (in lingua inglese) focalizzati su temi di cultura manageriale, di management nelle grandi imprese e nelle PMI, nelle amministrazioni pubbliche e nel terzo settore, casi elaborati con particolare riferimento al contesto economico italiano. Obiettivi dell'iniziativa – che è stata realizzata nel 2016 da ASFOR in partnership con l'editore GSE Research/Greenleaf Publishing – sono:

- la valorizzazione e la promozione dei “casi aziendali” che sono uno strumento didattico fondamentale per gli studi di management, oltre alla diffusione degli standard di qualità utilizzati a livello internazionale;
- la diffusione in ambito internazionale di “casi” scritti da autori italiani che evidenzino le peculiarità del nostro Sistema economico-produttivo. Al riguardo si ricorda la recente pubblicazione *“Italian Model of Management: a selection of case studies”* a cura di Luigi Serio, responsabile ASFOR Annual Case Writing Competition, edito da Greenleaf Publishing.



Il “caso aziendale” – che fa riferimento al modello sviluppato ad Harvard – viene internazionalmente riconosciuto come una metodologia didattica efficace per rafforzare competenze e sviluppare capacità dei manager, attivatore di risposte concrete alle sfide portate nei mercati dall'economia globalizzata.

I casi concorrenti, redatti in lingua inglese, sono stati valutati da una Commissione di Esperti che ne ha analizzato: l'originalità del “caso”, la sua struttura didattica, le *teaching note*.

Di seguito sono riportati gli abstract dei vincitori, che sono stati ritenuti dalla Commissione di valutazione particolarmente significativi in funzione della originalità e della focalizzazione sullo sviluppo del business, del management e della cultura manageriale in Italia.

Abstract dei primi casi classificati

I° classificato:

Positioning: the strategy of Italy Independent in the eyewear market¹ di Chiara Solerio, Anna Uslenghi, Laura Colm, Università Bocconi

Italia Independent (I-I) è un gruppo attivo nel mercato dell'*eyewear*, dei prodotti *lifestyle* e della comunicazione. Il core business è la produzione e distribuzione di occhiali da sole e montature da vista. L'ingresso di I-I nel mercato di massa avviene tra il 2008 e il 2010; il caso intende mostrare l'applicazione dei fondamentali modelli di segmentazione del mercato e di analisi del posizionamento competitivo di una marca, con riferimento appunto al brand I-I e alla sua strategia di ingresso nel mercato dell'occhialeria risalente al 2010.

Il contesto indagato è quello dell'*eyewear*. Nel 2010, anno cui risale la scelta strategica dell'azienda, il mercato mostra evidenti segnali di crisi, con tutti gli indicatori (vendite, import, export, numero di aziende e di occupati) in drastico calo. Sul fronte della produzione, pochi grandi colossi italiani, sempre più affermati sui mercati internazionali, determinano le regole del gioco. La competizione si è progressivamente inasprita e ha fatto emergere nuovi fattori critici di successo, fra cui la capacità di internazionalizzazione (commerciale e produttiva), il presidio della qualità e dello stile (Made in), lo sviluppo di proposizioni di valore “*cheap and chic*” (coerenti con i trend del fast fashion). Sul fronte *consumer*, nonostante si siano affermati nel mercato comportamenti di acquisto pseudo-compulsivi che riguardano occhiali di scarso valore venduti in farmacia, nelle edicole, nelle tabaccherie, nella GDO, gli occhiali (da sole e da vista) sono rimasti una categoria ad alto coinvolgimento. Ciò si verifica sia per il valore emotivo e simbolico del prodotto, sia per il rischio percepito dal consumatore, che tende a essere elevato sotto ogni punto di vista: fisico (perché un paio di occhiali costruiti con materiali scadenti può costituire una minaccia per la salute degli occhi), funzionale (perché un paio di occhiali non conforme può avere una performance inadeguata), economico (perché montatura e lenti hanno un costo rilevante) e psico-sociale (perché una scelta sbagliata può avere un impatto sull'autostima).

Protagonista del caso è l'azienda Italia Independent. Brand di occhialeria e prodotti *lifestyle*, nasce con l'obiettivo di coniugare tradizione ed innovazione, design e funzionalità. La vocazione dell'azienda è quella di rilanciare, aggiornandolo, il Made in Italy, dando vita ad un cosiddetto Made in Italy 2.0, al passo coi tempi e competitivo. La strategia è quella di affidarsi al passato, integrandolo con le innovazioni tecnologiche, le nuove formule distributive, ed i più moderni tipi di collaborazione che il presente può offrire al futuro. Ne deriva una gamma di prodotti sin da subito ampia e variegata, che combina – con creatività – soluzioni già esistenti riproponendole in forme (I-Velvet, I-Thermic) o contesti (I-Mirror, I-Teen) differenti. Ogni nuovo modello introdotto abbraccia la filosofia dell'indipendenza (claim aziendale: “*Essere indipendenti è scrivere ogni giorno la propria storia*”), fondandosi su un mix di ispirazione, innovazione tecnologica e rivisitazione dei modelli classici.

La sfida che Italia Independent si trova ad affrontare è quella di rifocalizzare la sua strategia di mercato a seguito delle criticità riscontrate nella prima fase di lancio del brand (2007), concentrandosi sul business dell'occhialeria e marginalizzando le restanti categorie di offerta (concessione in licenza e ridimensionamento produttivo). Gli studenti sono quindi chiamati ad elaborare una strategia di segmentazione, targeting e posizionamento adeguata, poste le informazioni rilevanti derivanti dalla lettura del caso ed eventuali integrazioni con altre provenienti da fonti ricercate in modo autonomo.

Il caso è suddiviso in tre parti. La prima intende analizzare da un lato mercato ed ambiente competitivo, individuandone opportunità e minacce; e dall'altro azienda e caratteristiche rilevanti, intercettandone punti di forza e di debolezza. Più in dettaglio, l'analisi di mercato serve a meglio qualificare il contesto competitivo, al fine di individuare struttura, caratteristiche funzionali, attori rilevanti e trend emergenti. Al contempo, l'analisi delle competenze distintive dell'azienda ha l'obiettivo di evidenziare le potenziali fonti di vantaggio competitivo da valorizzare, così come gli aspetti che potrebbero limitare la performance dell'azienda e che la strategia di marketing dovrebbe minimizzare o neutralizzare. La seconda parte del caso intende individuare una corretta modalità di segmentazione del mercato, indi qualificare quali competenze distintive sono necessarie all'impresa al fine di

¹ Il caso è entrato a far parte della collection ECCH.

servire efficacemente la sua clientela target. La sezione ha origine da un'analisi dei benefici ricercati dai consumatori; quindi prosegue con l'individuazione dei segmenti, dunque la rappresentazione degli stessi all'interno della mappa delle preferenze. L'individuazione delle competenze necessarie per servire i vari segmenti consente invece di ipotizzare il posizionamento dei diversi tipi di produttori, quindi favorisce la costruzione della mappa di posizionamento. La terza ed ultima sezione del caso ha l'obiettivo di individuare quale sia il target ideale per I-I e quale strategia di posizionamento l'azienda possa settare. Più in dettaglio, il caso prevede un'analisi trasversale degli insights derivanti dalle sezioni uno e due del caso; quindi una decisione strategica sostenuta dall'individuazione dei relativi vantaggi competitivi.

Questo caso è pensato per dare agli studenti la possibilità di confrontarsi con le complessità che si incontrano nel disegnare una strategia di segmentazione e targeting, quindi nell'implementare una decisione di posizionamento sul mercato. Il disegno di studio è arricchito dalla complessa congiuntura di mercato, sia fronte offerta, sia fronte domanda. Attraverso la lettura e discussione del caso, è possibile comprendere la difficoltà che il management ha dovuto affrontare considerata la varietà e la differente rilevanza degli elementi con i quali è stato costretto a confrontarsi. Il case study intercetta infatti plurime dimensioni, legate al consumatore, al sistema di domanda e offerta, alle specificità aziendali: solo dopo un'adeguata interpretazione ed un corretto match delle stesse è possibile risolvere il quadro, disegnando la strategia migliore.

Il caso si presenta per essere discusso in un contesto universitario, in corsi triennali o di Specialistica. Presuppone una pregressa conoscenza dei fondamenti di marketing. È costruito in maniera modulare, al fine di garantire al docente un utilizzo adeguato, coerentemente con i tempi disponibili e gli obiettivi didattici.

2° classificato ex aequo:

Ingredient branding & supply chain transparency in the jeanswear industry: the Isko™ case di Iolanda D'Amato, Francesca Romana Rinaldi, SDA Bocconi

Abstract

ISKO is the global leading player in premium denim. The company has the main goal of better managing and orchestrating its denim supply chain, to become more visible on the final market at B2B2C level and to become “the key ingredient” in this segment. In the same industry, other players share the same ambitions such as Archroma and Candiani. On the other hand, several brands such as Patagonia, Guess, Haikure, Levi's, Diesel and Nudie Jeans are looking to ingredient branding projects as differentiation opportunities. The case study helps facilitating the classroom discussion on the following topics: supply chain complexity, orchestration, sustainability, ingredient branding projects, innovation and supply chain transparency in the denim and jeanswear industry. Students will also engage in role-playing during which they will play the role of different companies and will have to decide which ingredient branding projects should be implemented for the following year. They will learn the main implications to be considered in the different supplier/customer perspectives, the main complexities and trade-offs to be managed in those projects. The recommended target audiences for this case are students of “Business Strategy”, “Strategic Marketing”, “Operations Management” or “Supply chain Management” courses of Master of Science in Management, MBA and executive education programs. In addition to this, the case can be discussed in courses specifically related to Fashion & Luxury industries.

What follows is an extract of the original “Ingredient Branding & Supply Chain Transparency in the Jeanswear Industry: the ISKO™ case”, focusing in particular on ISKO™ company profile, supply chain and its ingredient branding and sustainability projects. The complete case provides the same information for all the companies presented: Archroma, WashItalia, Candiani, Patagonia, Guess, Haikure, Levi's, Diesel and Nudie Jeans.

Introduction

The financial year is closing and the management of the companies involved in denim and jeanswear supply chain are reflecting on their annual results, they wonder if they made the right choices in terms of collaborations and ingredient branding projects. ISKO Global Marketing Director is at the window thinking about what to do next year to better manage and orchestrate the denim supply chain, to make its brands more visible on the final market and to become “the key ingredient” in the premium denim industry. Archroma marketing director shares the same ambition. On the other hand, Diesel, Guess, Haikure, Patagonia, Levi's and Nudie Jeans management teams are looking for successful differentiation strategies and wondering if collaborating with some of their suppliers on ingredient branding projects can support them in delivering new messages related to innovation and sustainability to their final customers.

The denim and jeanswear industry

Brief overview of current industry trends

In the last ten years, the jeanswear market experienced a drop in consumption for medium-priced jeans and an increase for the premium segment (in this segment price elasticity has decreased), while the low-priced segment has witnessed an amazing

growth (in this segment price elasticity has increased). The consequence is that the minimum price has reduced, the average price has increased and from the previous pyramid-like structure, the market now resembles an hourglass and companies need to strongly differentiate themselves in order to compete in the industry.

The increasing relevance of ingredient branding is coherent with this “premiumization” trend: communicating the presence of a quality ingredient that will be mentioned on the garment on display in the store, reassures and satisfies the consumers, providing an interesting way of getting out of that tired old look of a self-repeating shopping experience. The brand and the quality ingredient brand can together generate new energy, making the shopping experience more interactive and granting a high level of participation to the consumers.

Another differentiation strategy for the brands is the sustainability strategy: this could be the result of a proactive approach or a way of getting back the reputation eventually mined by scandals. Sustainability projects include those related towards the environment such the use of natural organic fibres and recycled or renewable synthetic resources, reduction, re-use and recycling of the resources (raw materials, energy and water) necessary in all stages of the product's life-cycle, from production to consumption, reduction of chemical substances and the use of vegetable dyeing, vintage, second-hand and upcycling.

The above mentioned differentiation strategies such as ingredient branding and sustainability need specific choices in terms of supply chain management which should be consistent with the strategic goals. As the nature of many business relations is changing from companies manufacturing goods within wholly owned facilities in national operations to companies engaging in supply chains and supplier-based manufacturing across national borders, the concept of CSR (Corporate Social Responsibility) and sustainability is likewise transforming. CSR is no longer the individual company's domain: increasingly, it encompasses the entire supply chain.

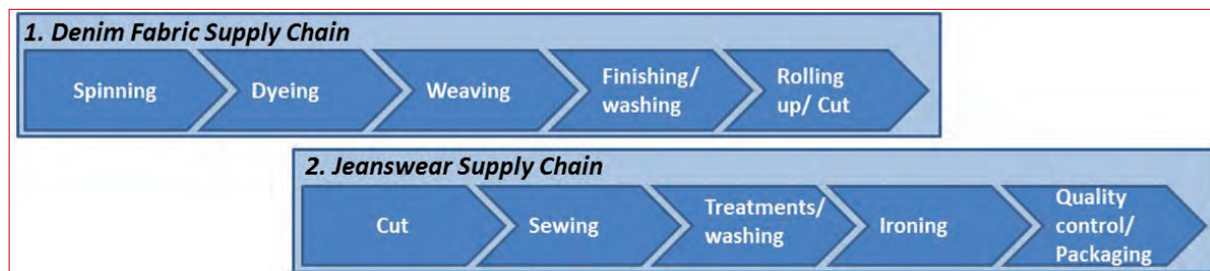
The Denim and Jeanswear Supply Chain

The denim and jeanswear supply chains include all those activities needed to transform the raw materials (cotton and the other fibers used) into the final garments and can be split in two supply chains:

- the first one refers to the processes and activities involved in the creation of denim fabrics
- the second one refers to the processes and activities needed to create the final garments.

The Exhibit 1 below summarizes the main activities of the two mentioned supply chains.

Exhibit 1. – Denim & Jeanswear Supply Chain



Source: The Jeanswear Industry

ISKO^{TM1}

ISKO is the world's largest denim manufacturer with a production capacity of 250 million meters of fabric each year in a 300,000 mq factory operating in 60 international locations with a sales force of over 200 experts, supported by R&D and marketing teams that serve brands locally. The company covers more than 35% of the global premium denim market with more than \$1 billion turnover.

It all begins with meticulous attention to quality and details, making ISKO the ideal choice for premium denim. Its mission is the creation of value generated through massive differentiation and segmentation of the product portfolio. Every six months, more

¹ ISKO is a brand of SANKO TEKSTIL, the textile division of SANKO GROUP. SANKO GROUP is a multinational company active in a wide range of different business sectors: from textiles to renewable energy, construction, packaging and financial activities. Privately owned by the Konukoglu family, today, SANKO is one of the largest conglomerates in Turkey with over 15,000 employees around the world and a turnover that exceeds €2 billion. The Group has a solid and well-established presence in the textile industry, greatly to the credit of ISKO, the international leader in denim fabric production.

Exhibit 2. – ISKO iconic patented innovations

MOST ICONIC ISKO™ INNOVATIONS

ISKO POP™
DENIM WITH UNPARALLELED SOFTNESS AND LUSTROUS SATIN-LIKE FINISH.

ISKO FUTURE FACE™
THE FIRST WOVEN FABRIC TECHNOLOGY WITH A KNIT LOOK AND A NATURAL FEEL AND COTTON TOUCH.

JEGGINGS™
THE CULT ITEM THAT REVOLUTIONIZED WOMEN STYLE WITH AN ELEGANT SCULPTING AND SLIMLINE EFFECT.

ISKO RECALL™
AN EXCLUSIVE ISKO™ PATENTED FABRIC TECHNOLOGY THAT ASSURES ALMOST 100% MORE RECOVERY POWER THAN OTHER STRETCH FABRICS ON THE MARKET.

ISKO REFORM™
THE OUTSTANDING TECHNOLOGY THAT ENHANCES THE SILHOUETTE WITH SUPERIOR RECOVERY AND EXCLUSIVE HOLDING POWER.

ISKO BLUEJYM™
HINTS AT ACTIVEWEAR BUT WITH A MORE REFINED FEEL AND UNDENIABLY DENIM APPEARANCE.

ISKO XMEN'S™
THE MUST-HAVE INNOVATION IN MEN'S DENIM DESIGNED WITH INVISIBLE SUPER-POWER STRETCH TECHNOLOGY.

ISKO, ISKO POP, ISKO FUTURE FACE, JEGGINGS, ISKO RECALL, ISKO REFORM, ISKO BLUEJYM and ISKO XMEN'S ARE TRADEMARKS OF SANKO TEKSTIL.

a WORLD of QUALITY and CREATIVITY

Source: ISKO internal documents

Wash Italia and some other key partners.

In 2014, ISKO conceived and assembled *Bluemasters, Innovation in Denim*, a two hundred page large-format book which tells the story of the past and, above all, the future of denim through the innovations and the voices of those who “do” denim. “Blue-

² ISKOTECA, in San Benedetto del Tronto, is the exhaustive product “library” where all ISKO concepts – over 25,000 products – are on display. It is not by chance that ISKOTECA is placed in the Marche region in Italy: Italy is divided in industrial districts and in the center of Italy (Marche and Abruzzo regions) very close to where ISKOTECA is placed there are more than 40 “lavanderie” (laundries in Italian) that are specialized on the washing and treatments for the jeans, among them Wash Italia, Fimatex and Itaclab; CREATIVE ROOM, in Castelfranco Veneto near Treviso (Italy), is the fashion design and research center for jeanswear, sportswear and streetwear brands as well as garment makers who are looking for a partner providing new inspiration. A second hub of the CREATIVE ROOM is in Istanbul. Newly opened in 2014, the CREATIVE ROOM gives designers the latest insights into the denim world, new trends, washing and accessories. It contains an archive of samples from around the world as well as the latest news of retail points and brands.

masters” are the men and women who have brought innovation to denim: in production and manufacturing, in creativity, in re-tailing or communications, or in making jeans the most iconic, sought-after garment on the planet.

ISKO I-SKOOL is an outside-the-box project involving some of the most important schools on an international scale; it is a talent award for students of design and marketing aimed at stimulating their creative expression as they learn how to industrialize their ideas: letting their talent take shape and flourish.

In 2014, ISKO brought all of its experience and visionary capacity to the **Copenhagen Fashion Summit** to predict denim trends from monitoring and analysis. Along with ISKO, the entire sector has intensified its focus on innovative ways of thinking and using denim fabric and on infinite possible uses of sustainable materials.

Ingredient branding project

Many major brands have chosen ISKO as their partner for projects and designs.

Each of them acknowledges ISKO as the international denim specialist among them Guess, Diesel, Levi’s and Haikure.

Thanks to the investment in R&D ISKO was able to study special patented technologies with their partners, developing products such as “jeggings”, “joggins”, and “blue skin”.

In order to support its ingredient branding strategies, ISKO is interested in building partnerships and collaborations projects with the main supply chain actors: its suppliers and its customers.

For what it concerns the customer’s side: ingredient branding, for ISKO, can be focused on sustainability, on innovation or on both, its idea is to link its brand with premium brands of the jeanswear industry.

ISKO has the ambition of becoming the “key” ingredient in jeanswear industry and is always available to create new partnerships for IB projects with the leading industry players such as Diesel, Replay, Liu-Jo, Guess, Jeckerson and others. When ISKO proposes to one of its customers an “ingredient branding” project, the managers know that they will have additional activities to manage. They will have to work with the customers on different topics: define how to structure and deliver the communication plan, ensure to give consistent messages to the final customers, guarantee all the required supply chain controls, especially if the IB is focused on sustainability. ISKO knows that this is much complex but it firmly believes that the right IB project will contribute to improve its brand recognition within the industry and will drive additional sales in the future.

For what it concerns the supplier’s side: ISKO believes that it has to promote its suppliers activities towards its clients. In the last years, the company did several activities with Wash Italia in order to create culture about available and innovative washing and treatments to customize and make the final garments unique as well as with Archroma in order to promote fabrics which have been dyed with sustainable or innovative chemicals able to improve the fabrics performances and innovation.

The ingredient branding projects are communicated both through B2B tools but also with B2C tools such as specific labels.

Supply Chain Management, sustainability to “responsible innovation”³

The denim production is centralized in Bursa factory, which is the largest industrial plant in Turkey, the company performs all the washing and finishing treatments on the denim fabrics internally. On the contrary, it outsources the production of the final garments used for the “ISKO collection”, which is presented to ISKO final customers in order to make them understand the different uses and potential of ISKO fabrics, and the washing/ finishing treatments on the final garments to different washing companies such as Wash Italia, Itac Lab, Martelli ecc.

ISKO prioritizes transparency and on-going relationships among their different players and stakeholders. Respect for the environment: an eco-friendly approach embraces every phase of the manufacturing chain with constant attention to ecological sustainability.

2° classificato ex aequo:

Loison Bakery. Tradition 2.0 for the excellence of a successful Italian family-run business di Angela Bova, psicologa

The case study describes the transformation and growth of Loison Bakery, a small family-run business based in Costabissara (Vicenza, Italy) which operates in baked products sector. The company has been run for three generations by the Loison family even if, since its foundation in 1938, during the years several strong changes have contributed to reshape its organization model, core business, target client and commercial approach.

Nowadays, Loison Bakery makes revenue for more than EUR 6.5 million. Half of this amount comes from foreign trade and the majority of total revenue – about 70% – from Panettone. However, the company has not even been this successful: when Dario

³ ISKO is certified by authoritative institutions who recognize their commitment to quality standards and their environmentally- friendly approach. Here are the certifications: OEKO TEX 100 Standard, Certification for the ecological requirements for textile products in direct contact with the skin; GOTS (Global Organic Textile Standards) Certification for products made with 100% organic cotton; OCS (Organic Content Standard) Certification for products made mostly with organic components; ISO 9001 – ISO 9002B Certification of manufacturing processes in terms of the finest internationally recognized quality standards.

Loison took over the family business in 1992 the competition represented by large retail chains was very strong and was endangering the existence of Loison Bakery.

The case study describes Loison's story since that year, when Dario Loison started to run the family-business by him-self introducing several innovations by re-engineering production, re-address investments on raw materials quality (to reposition his product), and designing new strategies to approach the international market through the Internet. Since the early Nineties Loison Bakery chose the Internet as key channel to spread the Company Manifesto and develop its marketing strategy based on:

- **Diversity:** The choice to diversify from competitors in order to emerge in the market, especially in the global one, may be a double-edged sword. On the one hand, a market approach based on traditional tools of marketing should benefit from diversity either in terms of product, strategy, and approach to client, on the other hand the Web and the criteria used to display pages online (based on SEO) and brows them tend to penalize diversity since they index pages using keywords chosen from among those most used by users during their researches.
- **Net-working:** At the end of the Eighties the company was in deep troubles because of the fact that Loison did not have a direct channel of market. This was the result of the fact that the company was used to produce for third parties: they did not have a sales network and a business plan. The decision to approach both retailers (in Italy and abroad) with a consistent commercial plan and end-users market with events and initiatives that would stimulate brand awareness has allowed the company to recover gradually. The Web has made it possible to promote international business partnerships at no cost and to publicize events and activities open to the general public by creating a network around the company.
- **Storytelling:** The choice to use their own family history to communicate to customers a coherent brand image committed to keeping a balanced relationship between innovation and tradition allowed to put in place a strategy to diversify earnings and establish a direct contact with market. In additions to this, the constant attention to "story-telling" allowed the company to increase brand awareness and give Loison an image of authenticity and credibility.

High standard of service, an artisan production, and most of all a pioneeristic usage of the Web have been, and still are, the Loison's added value in a word made by SMEs still focused on local market and that use Internet as any traditional marketing/selling tool.

Nowadays, the real challenge for Dario Loison is to continue to maintain his competitive advantage in a context where many SMEs are beginning to invest on the same strategies.

The case can be discussed in a general management class with a focus of the reality of Italian SMEs. Moreover, it could be a good occasion to begin to address theme such as Internet usage and Internalization in a class made by family-run business owners.