

**THE RESPONSE TO GLOBALIZATION  
OF CARPI DISTRICT  
IN THE 1990s<sup>1</sup>**

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**1. The structural characteristics of the district**

The district of Carpi comprises an area made up of five townships<sup>2</sup>, with a population of 90,000 inhabitants and employing overall 30,000 persons.

The firms involved in knitwear and clothing total just under 2,000 and this sector provides employment for 10,000 persons. The value of knitwear and clothing production was 1,950 billion lire in 1999.

The area accounts for one quarter of the knitwear and clothing in Emilia-Romagna and comprises one third of the firms active in this sector in the region. With regard to Italian production of female knitwear and clothing, Carpi accounts for about 6%.

The district is characterized by high specialization in the knitwear sector, representing 62% of the local production; and by the presence of small firms, 85% of the total firms having less than 10 employees and providing employment for half of all those working in the sector.

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<sup>1</sup> The data cited in this article are taken from the periodic reports on the district of Carpi edited by R&I srl. (1998, 2000).

<sup>2</sup> The district of Carpi lies in Emilia-Romagna (Italy), in the province of Modena, and consists of the townships of Carpi, Cavezzo, Concordia, Novi and San Possidonio. This territorial area, defined as the “heart of the district”, is characterized by having a share of employees in the textile/clothing sector of over 60% with respect to total manufacturing. Alongside the “heart of the district” it is possible to identify a “periphery”, made up of other townships contiguous with Carpi and having productive relationships with it. The townships belonging to the periphery of the district feature a smaller amount of sectorial specialization, since the employees in textile/clothing account for only 20-30% of the total employed in manufacturing industry. The data reported in this paper refer to the heart of the district.

Tab. 1 – The dimensions of the district of Carpi

	1999
Resident population	90,000
Textile/Clothing sector (TC)	
- Employees	10,071
- % employed in TC out of total manufacturing	62%
- Firms	1,810
- Turnover (bn lire)	1,950
- Export	38%

Source: R&I s.r.l., Observatory for textile/clothing sector in the district of Carpi

There are no large firms in the area. Only 15 (out of 1,810 firms) have more than 50 employees and account for 13% of the total employed. Among the firms working for the final market, those with more than 50 employees account for only 20% of the overall turnover of the district, and the top five firms, by value of production achieved, concentrate a limited share of the local production, equal to 13% of the turnover of the area.

At Carpi, the majority of the production is performed by small and medium firms: less than 400 firms have direct relation with the final market and 1,400 are subcontractors. The average size of the former is 12 employees, that of the latter 3.8 employees.

The final firms<sup>3</sup> of the district are considerably disintegrated: the majority of them outsource all the stages of the production cycle, maintaining in-house only those of the design and the marketing of the product. This partly accounts for the restricted employment dimension of the firms, even though the final firms of the district are, on average, small, also from the economic point of view.

More than half record a total yearly volume of business of less than 2.5 billion lire, and only 5.7% of all the firms post a turnover above 20 billion.

<sup>3</sup> The definition of final firm is based on four parameters: ability to design the product (and the use of this ability), direct purchase of the raw materials, coordination of the production process (which may mean coordinating subcontractors) and a direct relationship with the retailing system.

*Tab. 2- Firms and employees in the knitwear and clothing sector of the district of Carpi by class of employees, 1999*

	<i>Firms</i>		<i>Employees</i>	
	a.v.	%	a.v.	%
Up to 9 employees	1565	86.5	5005	49.7
10-49	230	12.7	3766	37.4
50 and over	15	0.8	1301	12.9
Total	1810	100.0	10071	100.0

*Source:* R&I s.r.l., Observatory for textile/clothing sector in the district of Carpi

*Tab. 3 – Firms and employees in the knitwear and clothing sector of the district of Carpi by type of firm, 1999*

	<i>Firms</i>		<i>Employees</i>	
	a.v.	%	a.v.	%
Final firms	386	21.3	4604	45.7
Subcontracting firms	1424	78.7	5468	54.3
Total	1810	100.0	10071	100.0

*Source:* R&I s.r.l., Observatory for textile/clothing sector in the district of Carpi

The subcontracting firms are characterized by specializing mainly in a single stage of the production cycle and by working almost exclusively for local final firms. Here, too, we are dealing with very small firms: 69% of them employ less than four persons and the average turnover per firm is a little over 200 million lire.

This very large number of small firms has direct repercussions on the structure of employment: more than a third of this is accounted for by independent workers and small entrepreneurs (35% of the total).

## **2. The development of the district in the 1990s**

## 2.1 General aspects

During the 1990s, the district of Carpi underwent a downsizing process in its textile/clothing sector. Unlike other Italian textile districts<sup>4</sup>, that had already been involved in processes of transformation and crisis in the previous decade, Carpi retained stability in production and employment base right up till the early 1990s, displaying good ability to adapt to the changing external context<sup>5</sup>.

The fall in the number of firms that began in the second half of the 1980s became accentuated in the 1990s and for the first time in the history of the district there was a drop in employment in the main sector.

The interesting point is that the majority of the jobs lost, amounting to almost 4,000 overall, concerned not so much the subcontracting firms but, rather, the firms working directly for the final market. It was among the final firms (that is, those designing and marketing the product) that the strongest selection occurred. During the 1990s, more than one third of the final firms ceased activity and employment in them fell by some 40 per cent<sup>6</sup>.

The final firms that underwent heavy downsizing were the *pronto moda* ones<sup>7</sup>. While *pronto moda* production accounted for 40% at the end of the 1980s, that figure has now dropped to 17%. This downsizing, regarding a type of production characterized by low qualitative levels and high fashion content, originated in the changes

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<sup>4</sup> On the case of Prato see Dei Ottati G. (1995) and (1996).

<sup>5</sup> On the 1980s in the district of Carpi see further Bigarelli D., Crestanello P., (1994) and Bursi T., (1989).

<sup>6</sup> In the same period the subcontracting firms and the employment in these firms fell by only 15%.

<sup>7</sup> The "pronto moda" firms are distinguished by preparing their samples collections at very short notice with respect to the sale season, offering products that will almost certainly appeal to the market. They stand at the opposite pole to those that operate according to the traditional calendar, called "programmato", and that assemble their samples collections about one year in advance of the season. The pronto moda firms create products of medium-low quality and sell almost exclusively on the domestic market through wholesalers. The main factor behind their success is the rapidity with which the product is designed, performed and sold on the market.

occurring in the purchasing behaviour of consumers and the increased competition from less expensive products coming from other regions of Italy<sup>8</sup> and from abroad. In the 1990s, the greater attention to price by consumers and the demand for products able to offer a good price/quality ratio contribute to expel from the market the majority of *pronto moda* firms located in the district.

In this period, however, several medium and medium-large firms of the district also closed, owing to problems connected with lack of generational turnover and as a result of takeovers by groups outside the area. These groups retained the brand names of the firms they had absorbed and quickly closed down the firms in the district that they had taken over.

Carpi thus lost not only many small-sized final firms but also historic firms, and of some size, that in the 1980s had contributed to helping the local system to hold its own.

In the period of study, it was above all the medium firms that were strengthened — those which, by the local standards, are represented by firms with turnover ranging between 20 and 50 billion lire and a number of employees often below the threshold of fifty. At the end of the 1990s the district of Carpi showed a degree of concentration of production lower than that at the start of the decade, and a higher incidence of medium and small firms.

Thus the district retained its particular structural characteristic based on the presence of small and medium firms and the absence of leading or guiding firms. Indeed, this characteristic became further accentuated.

Moreover, Carpi downsized not only in firms and employees but also in the value of the production performed. The turnover at constant prices fell by almost twenty per cent in the decade, and during this downsizing phase significant changes occurred. The main ones concerned<sup>9</sup>:

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<sup>8</sup> During the 1990s several final firms sprang up in the South of Italy, operating in *pronto moda*; such that in Puglia and Campania the incidence of these firms on the overall production of the aforesaid regions reached high levels, one quarter and one third respectively. For a comparative analysis of the characteristics of the textile/clothing sector in nine Italian regions see Brusco S., Bigarelli D., Baracchi M., (1995) and Brusco S., Bigarelli D., (1995).

<sup>9</sup> For more in-depth analysis see R&I srl. (1998-2000).

1. product policies;
2. outlet markets and distribution channels;
3. outsourcing policies.

## *2.2 The changes in the product*

Under the pressure of growing competition in the low and medium price bands, the firms of the district followed a strategy of upgrading their products and repositioning them towards the medium-high band of the market<sup>10</sup>. They also diversified the range of products offered, in accordance with the growing segmentation of the markets, with a resulting increase in the number of collections performed and models proposed.

The strategy of upgrading the productions had two important consequences: the first was that the quantities produced fell and the production was split up over a larger amount of models<sup>11</sup>; the second was that there was a rise in the costs of samples collections.

One of the characteristics of the local production, already present in the 1980s, represented by the performance of short production runs, was thus further accentuated during the 1990s.

If this product strategy can be seen as predominant, there is certainly no lack of firms in the district that maintain a presence in the medium and medium-low bands of the market and make fairly standardized products in medium-long runs. In facing up more directly to a competition based mainly on price, these firms tend to outsource more outside the area and especially abroad. They maintain within the district only the functions of design and marketing of the product and often have no productive links with the local subcontracting firms.

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<sup>10</sup> Currently, more than half of the final firms of the district are in the medium-high band, while only 16% make products of medium-low quality.

<sup>11</sup> The samples collection offered by the district of Carpi to its clients is estimated at 120,000 different models per year. The average number of models offered in one year by a final firm rose from 190 in 1990 to 300 in 1999, with a drop in average turnover per model (at constant prices) from 23 to 15 million lire.

### *2.3 The changes in the outlet markets and the distribution channels*

A significant aspect of the changes occurring in the district had to do with the outlet markets and the distribution channels. The main tendencies were the increased propensity in the district to export and the rise in sales to large distribution chains, at the expense of wholesale, the channel traditionally used by the local firms<sup>12</sup>.

The most significant aspect of these trends was the change in distribution channels. The wholesalers had always been privileged by the firms of the district and continued to be the most important distribution channel, but for the first time in the history of the district they did not absorb the majority of the local production.

This fact became of great importance since it expressed the producers' need to have a more direct relation with the market and the final consumer and a tighter control over the distribution of their own products.

This trend, however, also involved certain differences connected with the outlet markets. The firms operating predominantly in the domestic market increased their retail sales, which became the second most important distribution channel after wholesale; whereas the firms working mainly in export increased their sales destined for the large-chain distributors who, in this case too, became the second most important channel after the wholesalers.

These trends clearly reflected the diversities present in the structure of the Italian distribution system as against the majority of the industrialized countries. They had very different effects on both individual producers and the local production system.

The rise in export sales — which in the district of Carpi meant mainly sales to large-chain distributors or to commercial intermediaries — led to a substantial increase in the share of output

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<sup>12</sup> Sales to wholesalers fell from 55% in 1990 to 42% of the total in 1999, those to large distributors rose from 9% to 18%, while the incidence of retail remained unaltered at around 30%. The 1990s also saw an increase in the sales to commercial intermediary firms, to other producers and to various channels such as sales by catalogue.

sold under the client's brand name, which ultimately reached one third of the total<sup>13</sup>.

To be sure, the large foreign distribution does not seek low-quality products in the districts, it too being interested in well-made production with a high fashion and style content; but it does generally insist on its own brand name and impose constraints in the matter of the costs of the product<sup>14</sup>. If these constraints are not sufficiently counterbalanced by a high volume of orders, the producers risk an excessive shrinkage of the profit margins. This occurs especially in the case of small producers from whom the large foreign distributors buy only small runs or make occasional-type purchases.

The firms in the district harbour a certain mistrust of the large distributors. Those who work with them, in particular if they are small or medium in size, try to prevent the large distributors from becoming their principal sales channel; for the entrepreneurs are very careful not to create a situation of excessive dependence on one single client or a few clients, their policy tending towards the diversification of the distribution channels used and the types of clients dealt with.

The majority of the firms of the district work simultaneously for more than one distribution channel and tend to have several clients, none of them so important as to have excessive influence on the fate of the firm. Two factors underlie this strategy: the experience accumulated, especially by the first generation of entrepreneurs in the district, when Carpi developed thanks to relations with foreign buyers and large distributors abroad; and the precise determination of the local entrepreneurs to defend the independence they had won in those years, through a strong commitment to designing their own products and selling them with their own brand names. The mistrust towards large distributors stemmed also from the considerable bargaining power enjoyed by the latter and from the changeable policy pursued by the big chains in the matter of purchasing. In spite of this, a significant number of firms in the district were coming to terms with

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<sup>13</sup> Among the smaller-sized firms the share of sales under the client's brand name is even higher and exceeds 50% of the turnover. In the district, the small final firms export in significant amount and are those that work to the greatest extent for large organized distribution.

<sup>14</sup> The relation between small firms and large distribution is studied in depth in Marchi G., Nardin G. (1997).

large distribution chains; the more structured firms, especially, were looking for ways of cooperation that might lead to lasting relations.

The greater part of the firms in the district did not, however, work for large distributors, as they preferred to have relations with the wholesaler or directly with the retailer, both the traditional one and the chain of specialized shops or medium-sized specialized surfaces. What they shared was their effort to select their clientele and to base their relations with their clients on trust. It is by now common knowledge that clients must be sought and won over every time through the offer of competitive products and adequate service; just as the more structured firms recognize the importance of sealing genuine alliances with the distribution system, aimed at a greater integration and exchange of information.

It should be emphasized, however, that these strategies can be more easily pursued in the domestic market, i.e. with Italian distribution, whereas with regard to export more problems and uncertainties arise, both in maintaining the current markets and in entering new ones.

The most serious problems may have affected the firms that had not yet taken a precise decision as regards their market position. This concerned not a few firms within the district, generally small firms still tied to the traditional wholesale channel. These firms were able to increase their export sales in the years immediately following the devaluation of the lira (1992) but, in reality, they appeared to be at the mercy of the changes in the market, suffering significant losses in the later 1990s in both the domestic and foreign markets. These were firms that had difficulty in establishing a relation of trust with their clients, for two reasons: because their products were not sufficiently differentiated or qualified as compared with average, and because they were not able to provide certain important services<sup>15</sup>. The model of organization of these firms resembles that of the *pronto moda* firms: a weakness in design of the product and a great flexibility and responsiveness towards the market. The presence of firms of this type

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<sup>15</sup> The services most often demanded of the producer by the distribution system have to do with the possibility of reordering, of changing the production, of having delivery in lots, etc., see Brusco S. (ed.) (1998).

within the district suggested that the process of selection that had hitherto been ongoing was not completely at an end.

The other kinds of firms in the district featured a variegated series of combinations of distributive strategies characterized by aspects in common and by certain significant differences. There were firms working exclusively for retailing; others that, even while working for wholesale, were trying to orient directly towards retail; yet others that, while already working for retail or wholesale, had one eye on large distribution, and so on.

What was happening in this period was an intense, widespread search for new equilibria and new relations with the distribution system. In this respect, the firms of the district showed a significant dynamism.

What the different strategies pursued appeared to have in common was the importance that was given by firms to product innovation and upgrading, to the services offered to the client and to the integration with the distribution system. Whether the firm operated through wholesalers or sold directly to retailers or large distributors, it tended to find itself compelled to attend simultaneously to these three points and give greater weight than previously to the matter of services to the client.

When wholesalers or large foreign distribution chains turn to the district of Carpi, it is to seek quality products. They look for new ideas and new offers, and for this reason the strategy of the majority of the firms in the area, aiming to invest significantly in the design and quality of the product, turns out to be a winning one. While this is undoubtedly the district's strong card, the problem of redefining relations with the distribution system remains unsolved. To be sure, the problem is shared by all the producers operating in the clothing sector, but in the district it appears to be more complex, since the firms of the area remain at medium and medium-small size and, except in rare cases, cannot rely on strong, consumer-recognized brand names.

Despite the rise in exports, the district of Carpi continues to be closely tied to the domestic market and it is there that it has suffered a sharp fall in sales. Exports currently account for 38% of the district's turnover, but their growth has not been sufficient to offset the drop in sales on the Italian market. The majority of the final firms work

simultaneously for the domestic and export markets, as well as for a variety of distribution channels. This diversification of outlet markets and sales channels, at the level of the individual firm, has helped to bring about the increase in the number of product lines and models created as described in the previous paragraph.

#### *2.4 The changes in the localization of the productive outsourcing*

As a result of the product strategies they followed, the final firms of the district were compelled to relocate their subcontracted production.

Before looking at this, it should be emphasized that, as a productive system, the district of Carpi has always been “open” to the outside. Ever since the 1970s, the local firms had been delocalizing production stages to areas with lower labour costs — at that time, the neighbouring zones of the province of Mantua, in Lombardy, of Rovigo, in the Veneto, or of Ferrara, in Emilia-Romagna. Through the 1980s, the district tried outsourcing to new areas, regions of Central-Southern Italy and, to some extent, some foreign countries.

Local firms have always delocalized a large portion of their production outside the district, and this 60% share remained more or less stable throughout the 1990s. This is equivalent to saying that the district activates, outside of it, an induced industry comprising some 10,000 workers, so that it represents a productive system consisting of 20,000 employees overall, only half of these located within the district.

With respect to some 40% of production performed by local subcontractors, about 18% is entrusted to other subcontractors in Emilia-Romagna, 25% to subcontractors in other regions of Italy and 17% to subcontractors abroad.

Analyzing the trends of the 1990s, there emerges a sort of polarization of the localization policies of productive decentralization, determined by the stable amount of stages commissioned from local subcontractors and by the increase in those destined for abroad, as

against a significant drop in the stages subcontracted to other Italian regions, especially central and southern<sup>16</sup>.

The increased quality of the products and the splitting-up of production into very small orders, as well as the shorter production times, favoured the local subcontractors in those years; their advantages had to do with their ability to work to high standards of quality, to execute very small orders rapidly and to deliver the products in quick time.

The opposite trend, involving greater reliance on outsourcing abroad, had mainly to do with seeking lower costs. In this case, certain foreign countries, especially those of Eastern Europe, obviously provide better opportunities for saving on costs than do the regions of Central-Southern Italy. The firms of the district still occupying medium-low bands or specializing in fairly standardized production, like men's and children's wear, preferred to shift production from the Central-Southern regions to foreign countries, sometimes even by means of direct investment.

The outsourcing policies described above differ considerably from one another, however, according to the segment to which the firms belong. In the period of study, only the knitwear firms made increased use of local subcontracting, whereas the clothing firms continued to relocate production outside the area.

Although both segments were involved in the increased outsourcing abroad, knitwear, as a whole, became more rooted locally, making greater use of the productive capacity present in the district, whereas clothing further loosened its productive ties with the area and tightened its relations with other areas of Italy and especially with abroad.

As a result of these decisions, the subcontractors in the district are almost exclusively concerned with performing stages in knitwear production, 90% of the total, in which they can boast a tradition of greater skills and a specialization in stages with high capital intensity, like weaving. The local subcontractors continue to be very small in

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<sup>16</sup> From 1990 to 1999, the value of the production commissioned from local subcontractors fell, at constant prices, by -8%, that destined to other subcontractors in Emilia by -48%, to subcontractors in other regions of Italy by -36%, whereas that commissioned outside Italy rose by +80%.

size, to concentrate mainly on one single production stage, and to feature a considerable amount of independent workers: over half of the local subcontracting firms have no dependent workers, which helps to increase the flexibility typical of the small firm.

Among the subcontractors of the district the strongest nucleus is the knitwear weavers, who produce one third of the overall turnover; in second place are the firms offering the final stages in the production cycle, ironing, control and packaging. The cutting and make-up firms, also present in the area, are the ones most directly exposed to competition from areas with lower labour costs, and their segment is the one that has undergone most downsizing in recent years.

The local subcontractors continue to work predominantly for commissioners in the area, and may be said to modelled themselves according to the demands of the final firms of the district. It is only the more structured firms, able to perform or organize the entire production cycle, that are able to work for commissioners outside the district, as is also true of the highly specialized, technologically advanced firms, for instance those involved with knitwear weaving.

Although the local subcontractors are closely dependent on the district market, they retain a good autonomy with respect to their commissioners. They tend to work for a large number of final firms and it is uncommon for them to rely to any great extent on a single commissioner. The large number of commissioners present in the district still enables the local subcontractors to diversify their clientele and so limit their risk. Over the last few years, however, the larger subcontractors have been tending to diversify their commissioners by including firms outside the district.

If during the 1990s the majority of job losses did not occur among the local subcontracting firms, this was owing to the delocalization policies that the final firms of the district had already begun to pursue in the previous decades, by shifting much of their production to areas with greater availability of manpower and lower labour costs.

The production commissioned from local subcontractors, characterized by high-quality products, short runs and rapid performance, is the one that in the 1990s was least subject to downsizing; whereas the one hardest hit by internationalization processes was the production that had been earlier relocated to other Italian regions, including those of the Centre-South.

### 3. The prospects for the district

The development of the knitwear and clothing sector in the district of Carpi exhibits different characteristics from that of other industrial districts or other Italian textile areas.

During the 1990s, this productive system witnessed no phenomena of hierarchization among the local firms or affirmation of strong leadership, nor did any processes of firm concentration emerge<sup>17</sup>. The productive system has retained its pattern based on the presence of numerous small and medium firms, not only among those operating as subcontractors but also the firms that work directly for the final market. That there continues to be plenty of search for and experimentation of new products in the district is owing to the presence of many leading actors and several decision-making centres, connected with the design and marketing of new products.

Despite some shrinkage, the local production system holds its own by relying on its main points of strength and on the skills that have taken root in the district. The strategic decisions that were partly adumbrated in the 1980s became confirmed and specific in the subsequent decade. The district increasingly takes on the character of a place for invention and design of products, and as the place for the sole productions of small and very small series, of high-quality products and quick production. Not only that, but in the field of outer knitwear Carpi retains distinctive skills and a productive *filière* that is still complete.

In the 1990s the district repositioned itself in market segments less exposed to competition from low-cost producers and in segments not occupied by firms of larger size. The competitive devices available to the local firms are not, however, those used by the big firms. The majority of the firms in the district do not reach a size sufficient to enable them directly to control the distribution of their own products, through their own distribution networks, nor to promote their own brands to consumers, nor to rely to any significant extent on

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<sup>17</sup> For an analysis of what happened in other industrial districts see Bartolini S. (1994) on S. Croce sull'Arno; Russo M. (1996) on Sassuolo; Dei Ottati G. (1995) and (1996) on Prato; Crestanello P. (1996) and Corò G., Rullani E. (1998) on the districts and local systems of the Veneto.

internationalization of their production. However, the small local firms can count on the creativity and skills present in the district and on the search for new ways of relation with the distribution system. The ability to offer ever new products and the possibility of satisfying the most various demands of the client have always been the main distinguishing marks of this local system.

In the future, however, this district will have to find new patterns of cooperation and alliance in its relation with the distribution system, by seeking, in regard to its own clients, those forms of cooperation that it has always developed with its subcontractors. Only through a more integrated relation with the distribution can the producers of the district regain profitability, avoiding the excessive compression of the margins caused by the high bargaining power of the distribution system.

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### Summary

The article analyzes the main structural changes that took place in the district of Carpi (MO), Italy, during the 1990s. This decade marked the start of a new phase that, for the first time in the history of the district, witnessed downsizing in the local textile/clothing industry. In spite of this, the district continues to be distinguished by its high degree of industrialization and its specialization in the knitwear sector.

In the decade of study, important changes occurred. Firstly, there was a strong selection among the firms operating for the final market: not only did many small firms cease activity, but also several medium-large ones. At the end of the 1990s, the district displayed a degree of concentration of production lower than that at the beginning of the period and a greater incidence of medium and medium-small firms. Thus Carpi did not follow the pattern of other industrial districts or other Italian textile areas, which witnessed important instances of financial and productive concentration. Carpi remains a productive system with many leading actors, without strong leadership or large firms.

The changes that came about in the 1990s had to do with the repositioning of the district towards higher market bands, the increased propensity to export and the diversification of the distribution channels employed. In spite of downsizing, the district shows signs of dynamism and ability to respond to the growing international competition. The process of upgrading the local production is, however, causing a drop in the quantities produced and a diminution in the production runs, just as the differentiation of markets and distribution channels demands a greater differentiation in the range offered. This product policy, that emphasizes quality products, greatly differentiated and performed in short runs, has important implications for the pattern of the productive system, since it favours keeping production at local level and helps to slow down the productive internationalization of the district.