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## Introduction

For decades up until now, small and medium-sized enterprises (SMEs) have formed the backbone of both the Italian and European economies, weaving local traditions into global value chains and sustaining rural communities across the continent. Nowhere is this entrepreneurial spirit more vivid than in Italy's agri-food sector, where family-run producers transform old recipes into premium specialities—from Parmigiano-Reggiano to San Marzano tomatoes—that enrich tables everywhere in the world. Yet, as they carry Italy's culinary heritage onto the world stage, these SMEs face a host of new challenges: navigating complex certification regimes, forging trust in unfamiliar markets, and adapting to shifting consumer preferences that demand both authenticity and innovation. This research dives into the heart of this tension. It pits two distinct organizational worlds: Morgante Srl, a long-standing SME immersed in the Prosciutto di San Daniele Consortium, whose members pool reputation, resources, and institutional support to punch above their collective weight; and Salumificio di Genga, a fiercely independent family firm that thrives on agility, hands-on leadership, and deep local roots.

Drawing on semi-structured interviews with the firms' owners and export managers, company documents, and an in-depth literature examination, this research aims to understand how these two organizational models lead to different internationalization paths. Four indicators will be used to compare the two internationalization models: market access strategy, strategic transition, partner selection & network evolution and export-oriented innovation & adaptation.

Moreover, a comparative description and a narrative synthesis of the two companies will be produced through the lenses of Social Capital Theory and Contingency Theory. In doing so, the objective is to understand how different forms of embeddedness shape strategic choices of internationalization. By shedding light on the contrasting yet equally potent pathways to international success, this research aims to spark fresh ideas for policymakers, consortium managers, and solo entrepreneurs alike—inviting stakeholders to rethink the very nature of “network advantage” in an era where connection, configuration, and context determine who thrives on the global table.

# Chapter 1

## 1.1 Background

Small and medium-sized enterprises (SMEs) represent the pillar of both the European and Italian economies. In 2022, the European Union (EU-27) counted approximately 24.3 million active SMEs, accounting for 99.8% of all non-financial business sector enterprises and employing nearly 85 million people (Di Bella et al., 2023). Present across all 14 industrial ecosystems identified by the European Commission, SMEs play a particularly crucial role in the agri-food sector, where they generate 65% of total employment and 39% of value added (European Commission, n.d).

Italy mirrors this structural reality even more sharply. According to the OECD (2014), 99.9% of Italian enterprises qualify as SMEs, contributing 80% of national employment and 67% of value added—among the highest proportions in the OECD area. Notably, 95% of these businesses employ fewer than 10 people, reflecting the country's deep reliance on microenterprises. While this widespread entrepreneurial base fosters territorial resilience, it also reveals significant fragmentation: Italy has more firms per unit of GDP than any other major European economy, with many operating below the productivity frontier (OECD, 2014).

Italian SMEs are not only numerous but also vital to the country's export performance, contributing over 56% of total export volume—well above the levels seen in other large EU economies or the United States. However, their engagement in more advanced forms of internationalisation—such as foreign direct investment or strategic partnerships—remains relatively underdeveloped. Only around 35% of Italian SMEs pursue such pathways, compared to an EU average of 44% (OECD, 2014).

The agri-food sector exemplifies these dynamics. As the EU's largest manufacturing segment in terms of employment and added value, it encompasses farmers, processors, retailers, and food service providers, employing 4.6 million people and generating €227 billion in value (European Commission, n.d.). Over the past decade, European food exports have doubled, reaching €182 billion, with 60% of this trade remaining within the EU Single Market. Yet the sector continues to face structural challenges, including stagnating productivity, modest value-

added growth, and rising energy and input costs—issues that have been exacerbated by the COVID-19 pandemic and the war in Ukraine.

Within this context, the Italian agri-food sector has emerged as a key component of national economic resilience and global competitiveness. Particularly, agri-food SMEs have played a central role in reshaping Italy's trade balance. According to CREA (2023), their contribution has been essential in offsetting the traditional agricultural trade deficit, helping the sector achieve a positive balance in recent years. This transformation stems from a strategic shift toward quality, branding, and differentiation—especially in processed and high-value-added goods such as cheeses, coffee, pasta, and canned tomatoes. As Carbone and Henke (2023) highlight, Made in Italy agri-food products accounted for over 71% of total sector exports in 2019–2020, with a 30.8% growth over the previous decade—outpacing both global and domestic averages.

As reported by CREA (2023), Italian agri-food exports reached €60.7 billion in 2022—a 15.2% year-on-year increase, largely driven by price inflation rather than volume growth. Processed food products represented more than 80% of total exports, reaffirming the strategic centrality of value-added goods such as wine, cheese, and cured meats. Yet the sector also registered a slight trade deficit, primarily due to the rising costs of imported raw materials and energy inputs. The structure of the Italian agri-food business sector remains deeply fragmented. Most firms are small, family-owned enterprises with limited resources to manage complex international operations. Only a minority maintain continuous and structured export activity. Those that succeed are often integrated into formalised collective structures—such as consortia, supply chain contracts, or food clusters—and benefit from coordinated public and institutional support (ICE, n.d). These networks offer tangible advantages: they facilitate access to foreign markets, enhance reputational legitimacy, and enable participation in promotional initiatives and trade fairs. Such embedded firms are better positioned to navigate regulatory barriers and strengthen long-term partnerships abroad. In contrast, stand-alone firms are more vulnerable to exogenous shocks such as supply chain disruptions or regulatory volatility. In this environment, internationalisation is often less a proactive strategy than a necessary adaptation for survival (CREA, 2023).

## 1.2 Research Question

Despite a rich body of literature on SME internationalization, existing studies tend to isolate firm-level capabilities or generic market-entry strategies, while paying insufficient attention to how an SME's internal organizational design interacts with its external relational architecture. Research on social capital and networks has predominantly focused on innovation outcomes, leaving a critical blind spot regarding the role of network embeddedness in driving international growth (Adler & Kwon, 2002; Nahapiet & Ghoshal, 1998). Moreover, few comparative analyses directly juxtapose SMEs that are formally embedded in collective structures (e.g., consortia or PDOs) with truly independent firms that lack such institutional support—a particularly salient omission in the Italian agri-food context, where place-based certification and branding play an outsized role in export performance (Bertolini & Giovannetti, 2006; ICE, n.d).

This thesis addresses these gaps by positioning the organizational configuration of an SME—ranging from formalized consortium membership to independent governance—as an independent variable whose interaction with social capital configurations shapes internationalization outcomes. Drawing on Social Capital Theory and Contingency Theory, the study systematically compares two Italian agri-food SMEs with different profiles: the stand-alone Salumificio di Genga and Morgante Srl, a company embedded in the Prosciutto di San Daniele Consortium. It examines how these configurations influence four dimensions of internationalization performance—market access strategy, strategic transition towards internationalization, partner selection & network evolution, and export-oriented innovation & adaptation – thereby providing a comprehensive, multifaceted picture of SME internationalization dynamics.

Therefore, the central research question is:

*How does embedded membership in a formal consortium versus stand-alone governance influence the internationalization pathways of Italian agri-food SMEs across key strategic and relational dimensions?*

The specific objectives of this study are two. First, to delineate and operationalize the key characteristics of an SME's organizational configuration—ranging from formal consortium membership to fully autonomous firms. Second, to empirically compare the two companies to

reveal how differences in governance structure and relational embeddedness shape strategic decision-making and international outcomes.

From a theoretical point of view, to describe the organizational configuration and the ties between the firm and its partners, the key concepts of Social Capital Theory and Contingency Theory will be employed. Empirically, the firm's organizational form (embedded vs. independent) will instead be used as the independent variable in the analysis.

Through this systematic, comparative analysis, the study aims both to fill the theoretical gap on the interplay between firm architecture and network embeddedness and to generate actionable recommendations for policymakers and industry practitioners seeking to foster SME export success.

### **1.1.1 Research Significance**

In light of the strategic importance of SMEs in the European and Italian economic contexts—where nearly 100% of non-financial enterprises are SMEs contributing over 80 % of national employment and value added (Di Bella et al. 2023; OECD 2014)—and of the agri-food sector's weight in the Made in Italy brand on global markets, an in-depth analysis of the organizational and relational mechanisms that underpin international activity becomes essential. Despite established studies on social capital and networks showing how embeddedness influences innovative capacity, there remains a gap in integrating how a firm's governance structure—from formalized consortium membership to independent family-run enterprises—interacts with its relational configurations to enter and consolidate in foreign markets (Adler & Kwon 2002; Nahapiet & Ghoshal 1998). Moreover, in the Italian context—characterized by a plurality of consortium models and geographical certification systems—there are no direct comparisons between consortium-affiliated and standalone firms, even though such differences may lead to significantly divergent export performances (Bertolini & Giovannetti 2006; CREA 2023). This study fills that gap by offering an analytical framework that integrates Social Capital Theory and Contingency Theory to explain how different organizational configurations shape market-entry choices, strategic transition toward internationalization, partner selection & network evolution and export-oriented innovation & adaptation. In doing so, the research not only enriches the academic debate on SME internationalization but also provides a systematic approach to interpreting governance and networking dynamics in sectors marked by high production fragmentation and strong territorial relevance.

## **1.3 Literature Review**

### **1.3.1 Internationalization of Small and Medium Enterprises**

The internationalization of small and medium-sized enterprises (SMEs) has traditionally been understood through stage-based models that describe a progressive, experiential expansion into foreign markets. The Uppsala model, for instance, posits that firms reduce uncertainty through incremental learning, gradually increasing their international commitments (Johanson & Vahlne, 1990). However, increasing empirical evidence challenges the universality of this framework. Contemporary research highlights that internationalization trajectories are often discontinuous, path-breaking, and shaped by both strategic agency and environmental contingencies. Rather than following linear, cumulative stages, many SMEs exhibit iterative patterns—entering, exiting, and re-entering markets in response to changing internal capabilities and external shocks (Chetty & Campbell-Hunt, 2003; Dominguez & Mayrhofer, 2017; Santangelo & Meyer, 2017).

This processual instability is particularly pronounced when contrasting traditional exporters with "born global" firms—young ventures that internationalize rapidly from inception. These firms, often driven by entrepreneurial intent rather than gradual learning, bypass the incremental logic of classical models. Although they demonstrate agility and early global reach, they are also more vulnerable to failure due to limited organizational depth and untested routines. The born-global phenomenon thus exposes a fundamental limitation in the idea that firms must learn before they leap (Knight & Liesch, 2016; Chetty & Campbell-Hunt, 2003).

Moreover, the growing diversity of entry modes further complicates any prescriptive understanding of internationalization. SMEs engage with foreign markets through an array of mechanisms—exporting, licensing, alliances, or digital platforms—often using hybrid approaches that reflect specific strategic intents rather than a uniform developmental logic (Nisar et al., 2012). These choices are mediated by firm-specific resources, managerial cognition, and the institutional landscape of both home and host countries (Nisar et al., 2012). The implication is clear: internationalization is not a path, but a portfolio of adaptive decisions that defy one-size-fits-all theorizing.

Another key dimension is the centrality of organizational learning. Internationalization is not merely a market-facing activity; it is an internal learning process in which firms develop new capabilities, reconfigure existing ones, and test the boundaries of their absorptive capacity. Firms that are able to extract strategic insights from past experiences and reframe them in future contexts are more likely to navigate complex and volatile international environments

successfully (Cerrato & Depperu, 2011; Kamakura et al., 2012). In contrast, firms that rely solely on experiential intuition or ad hoc adaptation tend to stagnate or retrench. The decision-making processes underpinning these dynamics vary widely—some SMEs follow rational, calculated strategies, while others operate in a logic of “muddling through”, adjusting reactively to emerging opportunities (Schweizer, 2012).

Despite these insights, a significant conceptual gap remains. Much of the literature focuses on firm-level attributes—resources, capabilities, entrepreneurial orientation—without adequately accounting for how organizational and relational configurations shape internationalization pathways. The role of structural embeddedness, particularly whether an SME operates independently or as part of a formal collective (e.g., a consortium), is underexplored. This omission is critical. While some studies hint at the impact of network structures and institutional affiliations, few explicitly compare different configurations to assess how they condition access to knowledge, reduce uncertainty, or enable strategic coordination during international expansion (Freeman et al., 2006).

This gap is particularly salient for family-run SMEs, whose ownership and governance shape not only strategic choices but also the very configuration of their relational assets; recent syntheses show heterogeneous internationalization patterns depending on family control, generational stage, and managerial professionalization (De Massis et al., 2018).

Some scholars have tried to explore this direction. Indeed, a consistent finding across multiple contexts is that relational ties enable small firms to overcome the resource constraints typical of SMEs. Singh, Alam, and Baidya (2022) demonstrate in their study of Indian manufacturing exporters that cooperation with customers, industry associations, R&D centres, and government agencies not only has a direct positive impact on firm performance but also works indirectly by fostering innovation and market expansion.

Their PLS-SEM analysis of 117 firms shows that network embeddedness increases both the intensity and breadth of internationalization, which in turn mediates enhanced innovation and ultimately performance (Singh et al., 2022). This underscores the importance of a more formalized cooperation as a driver of export success and provides a model for understanding how formal versus informal network structures might differentially benefit agri-food SMEs.

### 1.3.2 Social Capital for Internationalization

Even though there is no commonly agreed definition for the concept of social capital, it is widely recognized as a critical relational resource that – in firms' studies - enables companies to access external information, build legitimacy, and coordinate actions across organizational boundaries. Rather than a cultural or psychological trait, social capital is understood as a structurally embedded asset, composed of networks of social ties that facilitate the flow of knowledge, trust, and opportunities (Adler & Kwon, 2002; Nahapiet & Ghoshal, 1998). These networks differ in configuration and function, with strategic implications for firm behaviour. Core typologies distinguish between structural, relational, and cognitive dimensions of social capital (Nahapiet & Ghoshal, 1998), as well as between different tie types—strong versus weak (Granovetter, 1973), and bonding versus bridging (Putnam, 1993).

In addition to these horizontal dimensions, social capital also encompasses a vertical form, commonly referred to as linking social capital. Linking ties connect firms with institutions, regulatory authorities, and other actors in positions of power, thereby granting access to formal resources and recognition that go beyond peer-to-peer networks (Szreter & Woolcock, 2004). While bridging relations are crucial for reaching diverse and heterogeneous partners, linking relations enable SMEs to secure institutional legitimacy, navigate regulatory frameworks, and obtain political or financial support (Stone & Hughes, 2002). In internationalization processes, this vertical dimension of social capital becomes particularly relevant, as firms often face not only market-related uncertainties but also institutional barriers abroad (Stojčić, Dabić & Musteen, 2024).

The capacity to establish and maintain linking ties thus complements bonding and bridging by anchoring firms within broader governance structures and enhancing their ability to scale operations across borders (Marcazzan, Campagnolo & Gianecchini, 2022).

Structural social capital describes the network of ties that enables actors to reach people and resources, whereas relational social capital captures the trust, norms, and obligations that underpin their interactions. Cognitive social capital, by contrast, refers to the shared language, narratives, and frameworks of meaning that allow group members to interpret information in a common way. While both relational and cognitive dimensions support resource exchange, relational capital emphasizes affective bonds and mutual trust, whereas cognitive capital highlights collective understanding and shared interpretations (Andrews, 2010; Claridge, 2018).

To bridge these concepts, consider that the strength and type of network ties serve as the concrete pathways through which structural, relational, and cognitive social capital operate. Strong or bonding ties—characterized by frequent interaction, emotional closeness, and high trust—reinforce both the relational dimension (through affective bonds and norms) and the cognitive dimension (through shared language and mutual understanding) within a cohesive group (Putnam, 1993; Nahapiet & Ghosal, 1998). Conversely, weak or bridging ties expand the structural dimension by linking actors to diverse, non-redundant networks, and they facilitate access to new information and resources that spur exploration and innovation, even if they carry lower levels of trust and shared cognition (Putnam, 1993; Burt, 2000).

Building on the bonding versus bridging distinction, Burt's (2000) network approach further emphasizes structural holes—the gaps between non-redundant contacts—as prime sites for brokerage. Firms that occupy these brokerage positions act as bridges between otherwise disconnected actors, gaining early access to diverse information and exerting control over resource flows across sub-networks. By spanning structural holes, such firms enhance their innovative potential and strategic flexibility, complementing the dynamics of strong (bonding) and weak (bridging) ties.

Building on the previous discussion of social-capital dimensions and tie typologies, these distinctions acquire direct managerial relevance in the SME context. By virtue of their limited scale and scarce international experience, SMEs face pronounced burdens of smallness and foreignness—barriers that limit access to market knowledge, partners, and resources abroad (Szreter & Woolcock, 2004). In the absence of formal infrastructures, they therefore compensate through social capital, leveraging trust-based ties and network positions to navigate fragmented institutional environments and reduce uncertainty (Granovetter, 1973; Coviello & Munro, 1997; Rodrigues & Child, 2012; Altnaa et al., 2021; Marcazzan, Campagnolo & Gianecchini, 2022). Network ties not only facilitate access to international buyers or partners but also function as support mechanisms—for example, by connecting firms to export agencies, certification bodies, or promotional institutions (Johanson & Mattsson, 1988). In this sense, social capital operates across both informal-relational and formal-institutional dimensions, which differ in their ability to produce legitimacy, coordination, and scalability (Woolcock & Narayan, 2000).

For family-run SMEs, these dimensions are further conditioned by governance features: strong kinship-based bonding can sustain trust and continuity yet may constrain openness to external partners and institutional actors unless complemented by bridging and linking ties. Recent reviews and evidence on family business internationalization underline that heterogeneity in

family involvement (e.g., founder dominance vs. multi-branch ownership; presence of non-family managers) systematically shapes whether firms remain locked into dense bonding or succeed in building bridging and linking relations critical for foreign expansion (De Massis et al., 2018).

Research shows that firms embedded in formal collective structures, such as consortia, often exhibit stronger capacities to activate bonding, bridging and linking social capital. Participation in such structures enhances access to institutionalized branding, collective certifications, and shared export promotion infrastructures (Rodrigues & Child, 2012; D'Angelo et al., 2020). Through linking ties, these networks also connect firms to public authorities, regulatory bodies, and political actors, strengthening their legitimacy and ability to overcome institutional barriers in foreign markets (Szreter & Woolcock, 2004).

These ties, while often formalized, generate relational trust through shared history, governance, and reputational interdependence. Moreover, the codification effect of cooperatives enables the incorporation of mutual self-help activities into formal economic systems—standardizing roles, procedures, and governance rules so that solidarity practices become sustainable organizational routines (Valentinov & Iliopoulos, 2021). For example, collective brands like the Prosciutto di San Daniele Consortium offer not only legal and commercial advantages but also relational assets that individual firms can leverage in foreign market interactions. These dynamics can be interpreted as manifestations of institutional social capital—network-based access to formal supports, resources, and legitimacy that complement the firm's internal capabilities (Johanson & Mattsson, 1988; Woolcock & Narayan, 2000).

In both embedded and stand-alone contexts, family ownership further nuances the configuration of social capital. Family-run SMEs typically build their networks on kinship and long-standing community ties, which reinforce bonding capital and generate strong trust-based relations (Arregle et al., 2021). While this embeddedness supports resilience and continuity, it can heighten risk aversion and limit openness to external partners and institutions abroad. The key divergence lies in how firms complement dense bonding with bridging and linking ties (De Massis et al., 2018; Westlund & Bolton, 2003; Arregle et al., 2021).

Consistently, family ownership also leaves a fingerprint on entry-mode choices—an outcome that is relational as much as economic: founder-dominated firms, prioritizing control, tend to underinvest in cooperative modes (limiting bridging/linking), whereas diversified family ownership and the inclusion of non-family managers correlate with greater openness to partners abroad and more complex modes of entry (Pongelli, Caroli, & Cucculelli, 2016).

As a result, internationalization may occur more sporadically, driven by individual relationships or circumstantial opportunity rather than coordinated strategy (Baker, 1990; Leenders & Gabbay, 2000). In such firms, the mobilization of weak or bridging ties may be *ad hoc*, and the absence of formal support systems can constrain strategic adaptation. Moreover, excessive reliance on bonding capital can lead to over embeddedness, characterized by inertia, conformity, and reduced responsiveness to changing external environments (Leenders & Gabbay, 2000).

These structural and relational differences are not only descriptive but also have explanatory power in shaping firms' internationalization trajectories. Social capital determines how information is acquired, how opportunities are recognized, and how firms respond strategically to institutional complexity abroad (Lindstrand & Melén Hånell, 2017).

Particularly in the agri-food sector, where product origin, certification, and trust play central roles in export viability, the capacity to activate both relational and institutional forms of social capital is essential. Formal networks enhance access to export markets by offering legitimacy and coordination, while bridging ties provide the flexibility to adapt to heterogeneous foreign demands. Viewed through business-model lenses, these relational configurations are the channels through which firms enact different value-creation logics: complementarity and lock-in rest on cooperative, trust-intensive ties (relational/structural capital), while novelty and efficiency often require bridging to diverse partners and, in codified agri-food settings, linking to institutional actors (Campagnolo, Gianecchini & Mosca, 2023).

### **1.3.3 Organizational Fit and Internationalization Choices: Contributions from Contingency Theory**

Organizational effectiveness in SME internationalization depends fundamentally on achieving a close “fit” between a firm's internal configuration—its structures, resources, and decision processes—and the specific demands of its external environment (Donaldson, 2001; Burton & Obel, 2018). Contingency Theory rejects the notion of universal best practices, instead positing that optimal performance emerges when managerial choices are aligned with both environmental variables and firm-specific capabilities. Luthans and Stewart's (1977) ERM-PC model encapsulates this by showing how Environment (E), Resources (R), and Managerial

decisions (M) interact to produce Performance Criteria (PC) outcomes in a systemic, configurational logic.

Child and Hsieh (2014) extend this contingency perspective to SME internationalization by demonstrating that different decision modes (reactive, incremental, bounded rationality, real options) and their associated network attachments (tacit social ties versus formal, codified relationships) vary systematically with informational and relational contingencies. For example, SMEs facing highly uncertain, knowledge-intensive domains (e.g., biotech spin-offs) tend to adopt real options reasoning—maintaining multiple provisional commitments—supported by weak, formal ties to scientific networks that supply broad-scope, explicit information. Conversely, SMEs in low-innovation sectors (e.g., traditional clothing manufacturers) operate predominantly in a reactive or incremental mode, relying on tacit knowledge and dense social ties to navigate foreign market entry (Child & Hsieh, 2014).

Firms embedded within formal collective structures often achieve superior structural fit in environments that promote standardized quality, collective reputation, and coordinated marketing (Forte & Oliveira, 2019). Such embeddedness confers shared legitimacy, pooled resources for branding and promotion, and streamlined access to institutional export support (Mintzberg, 1979).

Under a family-governance lens, contingencies internal to ownership further condition this fit: when socioemotional objectives amplify control preferences, firms privilege incremental, trust-based paths; when governance opens to external managers and multi-branch ownership, bridging/linking relations and cooperative entries become more viable (De Massis et al., 2018; Pongelli et al., 2016).

These advantages can reduce the search and coordination costs associated with bounded rationality or real-options decision processes, enabling embedded SMEs to scale more rapidly in markets that reward uniformity and collective certification (Forte & Oliveira, 2019; Mintzberg, 1979).

In contrast, independent family-run businesses typically embody leaner, more flexible structures that facilitate rapid, case-by-case adaptation to niche market opportunities. Without the buffering effects of collective support, these firms compensate by cultivating strong, informal partnerships and by continuously “muddling through”—a process of incremental adjustment based on ongoing feedback (Schweizer, 2012). Although this confers high responsiveness, it also exposes stand-alone SMEs to greater volatility, since they must internally generate the relational capital and explicit market information that consortia members often receive exogenously.

Empirical studies underscore that neither embedded nor autonomous configurations are inherently superior; rather, success hinges on the degree to which a firm's configuration matches environmental contingencies. Domínguez and Mayrhofer (2017) show that traditional exporters adjust their level of market commitment by renegotiating internal resource allocations in response to shifting demand conditions, while Nisar et al. (2012) find that entry-mode choices reflect firms' capacity to assess risk and mobilize relational capital within the networks available to them. In the agri-food sector—where place-based identity, quality standards, and collective branding are essential—understanding these divergent, configuration-specific pathways is essential for explaining why some SMEs internationalize effectively with minimal formal support, whereas others leverage collective frameworks to expand more rapidly and resiliently.

Configurational evidence also indicates equifinality: different combinations of resources, relational architectures (bonding/bridging/linking), and business-model themes can yield high performance so long as they are aligned with environmental demands—echoing the core premise of contingency fit (Campagnolo, Gianecchini & Mosca, 2023).

In this study, the key contingency under investigation is the very form of organization—whether an SME operates as a stand-alone entity or within a collective framework—and how that structural configuration conditions its internationalization pathway. In particular, the study examines how organizational form shapes decision-making modes, determines the nature and scope of network attachments, and ultimately influences the firm's ability to identify, evaluate, and exploit foreign market opportunities. By treating stand-alone and collective configurations as the central contingency, it's possible trace how differing structures generate distinct trajectories of internationalization.

### **1.3.4 Addressing Literature Gaps**

Despite extensive insights into how dense ties and shared norms foster innovation (Adler & Kwon, 2002; Nahapiet & Ghoshal, 1998), scholarship has yet to unravel how different modes of network embeddedness concretely shape the internationalization paths. Similarly, while Child and Hsieh's (2014) configurational–contingency framework compellingly links decision modes to information use and network attachment, its applicability has not been tested within Italy's highly codified agri-food certification regimes. Moreover, foundational contingency research (Donaldson, 2001; Luthans & Stewart, 1977) calls attention to the critical role of

structural fit between firms and their environments, yet governance form generally appears as a peripheral control variable rather than as a central contingency.

In the case of family-run SMEs, recent studies further emphasize that ownership structure, generational stage, and the presence of non-family managers systematically influence the balance between bonding, bridging, and linking ties (De Massis et al., 2018; Pongelli, Caroli, & Cucculelli, 2016). However, the intersection between family governance, social capital configurations, and internationalization remains underexplored, particularly in agri-food settings where collective certifications and consortia provide powerful institutional platforms. This thesis addresses these lacunae by juxtaposing *Salumificio di Genga* with *Morgante Srl*. Through semi-structured interviews, primary and secondary documentation, it aims to understand how each organizational form conditions SMEs' relational configurations and export-performance dimensions; empirically identify the decision modes that predominate under stand-alone versus consortium-affiliated governance and their impact on market-entry timing and choice; and, by elevating organizational configuration to the status of primary contingency, illuminate how structural design steers the pathways through which Italian agri-food SMEs internationalize. In doing so, the study also draws on a configurational perspective (Campagnolo, Gianecchini, & Mosca, 2023), exploring whether different combinations of relational resources and governance logics may generate equifinal pathways to international success.

#### **1.4 Theoretical Framework**

The conceptual model underpinning this research is grounded in an integrated application of Social Capital Theory and Contingency Theory, with governance form (embedded versus isolated) serving as the primary contextual variable.

The conceptual model of this research draws on insights from organizational and network studies. Firms build competitive advantage by mobilizing both strong ties—based on trust and tacit knowledge—and weak ties, which provide access to non-redundant external information (Nahapiet & Ghoshal, 1998; Adler & Kwon, 2002). In collective forms of governance, such as consortia, these ties are institutionalized through codified procedures, shared infrastructures, and collective reputation, while independent SMEs rely more on informal and locally rooted relationships.

From the perspective of Social Capital Theory, firms derive competitive advantage by mobilizing strong ties, characterized by deep trust and tacit knowledge exchange, and weak ties, which connect them to external sources of non-redundant information (Nahapiet & Ghoshal, 1998; Adler & Kwon, 2002). Consortium membership institutionalizes both tie types by providing codified procedures and shared promotional infrastructures, whereas independent SMEs rely on informal networks rooted in local relationships. Family ownership further conditions these dynamics: strong kinship-based bonding is typical of family firms, but the extent to which bridging and linking ties are developed depends on heterogeneity in governance, generational stage, and the involvement of non-family managers (De Massis et al., 2018; Pongelli, Caroli, & Cucculelli, 2016).

Contingency Theory asserts that the value of these ties depends on the alignment between a firm's internal structure and the complexity of its external environment (Donaldson, 2001; Burton & Obel, 2018; Luthans & Stewart, 1977). Specifically, consortium-based governance, through formalized networks, supports a strategic approach emphasizing simultaneous market entries and broader exploration of alternative markets, underpinned by codified information flows and shared reputational guarantees. Conversely, autonomous governance emphasizes a more gradual and selective trajectory, in which firms prioritize successive adaptations based on close contacts and local feedback loops. Configurational evidence further suggests that there is no single best model: different combinations of bonding, bridging, and linking ties, aligned with governance structures, can generate equifinal pathways to internationalization (Campagnolo, Gianecchini, & Mosca, 2023).

This framework yields three core propositions:

1. Consortium-embedded SMEs, by institutionalizing weak and linking ties, will find it easier to evaluate and pursue multiple market options concurrently.
2. Stand-alone family SMEs, relying primarily on strong localized ties, will advance through incremental steps, consolidating each phase before proceeding to the next.
3. Environmental complexity (e.g., the rigidity of certification requirements) moderates the effectiveness of each governance model, magnifying the advantages of formalized networks in highly codified settings and those of informal networks in niche or rapidly changing markets.

This theoretical schema does not anticipate empirical findings but delineates how governance form, family ownership, and social-capital configurations shape the entry, learning, and adaptation strategies of Italian agri-food SMEs.

# Chapter 2

## 2.1 Overall and Objective

This study investigates how different organizational and relational configurations influence the internationalization pathways of Italian agri-food small and medium-sized enterprises (SMEs). Rather than comparing export performance in quantitative terms, the research seeks to understand how firms activate and combine internal resources, institutional affiliations, and network relationships to navigate complex foreign markets. The core assumption is that internationalization is not only a matter of strategy or opportunity, but a process deeply shaped by a firm's degree and modality of embeddedness in collective structures and relational ecosystems.

Building on an integrated theoretical framework that combines Social Capital Theory and Contingency Theory, the study explores how governance form—namely, operating as an independent firm or within the framework of a formalized consortium—conditions firms' access to information, legitimacy, and support in the export process. Social Capital Theory provides the analytical tools to examine how firms mobilize bonding, bridging, and linking ties to reduce uncertainty and enable cross-border action (Adler & Kwon, 2002; Nahapiet & Ghoshal, 1998). Contingency Theory, in turn, highlights the importance of fit between organizational configuration and environmental conditions, especially in sectors marked by regulatory complexity, reputation-based competition, and institutional asymmetry (Donaldson, 2001; Child & Hsieh, 2014).

To operationalize this inquiry, the study focuses on four key indicators derived from the literature on SME internationalization and relational embeddedness:

1. Market access strategy: the combination of channels, intermediaries, and tools (e.g., trade fairs, consortia campaigns, public agencies) through which firms enter and position themselves in foreign markets;
2. Strategic transition toward internationalization: the firm's internal transition from occasional export activities to a more structured international orientation.
3. Partner selection and network evolution: the structure and trajectory of external relationships across commercial, institutional, and promotional actors;

4. Export-oriented innovation and adaptation: the ways in which firms modify products, packaging, narratives, or processes to meet the expectations of foreign consumers and buyers.

The main research question guiding this work is:

*How does embedded membership in a formal consortium versus stand-alone governance influence the internationalization pathways of Italian agri-food SMEs across key strategic and relational dimensions?*

To explore this question in greater depth, particular attention is paid to how participation in a consortium—specifically a Protected Designation of Origin (PDO) consortium—affects firms' ability to access reputational capital, participate in collective promotion, and build trust with foreign partners, compared to firms that operate independently and rely on project-based or informal mechanisms.

Ultimately, the study aims to contribute to a deeper understanding of how embeddedness—whether formal or informal, institutional or entrepreneurial—affects the internationalization capacity of SMEs in a sector where identity, authenticity, and trust play a critical role. Rather than providing generalizable prescriptions, the analysis offers theoretical insights and practical reflections on the multiple paths through which small agri-food firms can navigate global markets.

## **2.2 Research Design**

This research adopts a multiple holistic case study design, as formulated by Yin (2011). The holistic perspective is justified by the need to analyse each firm as an integrated unit, considering both its internal governance structure and its external relational positioning. This approach is particularly well-suited to exploring complex and situated phenomena—such as SME internationalization—in real-life contexts, where strategic behaviour is shaped by multilevel interactions and evolving institutional constraints. Using Yin's (2011) logic of pattern matching, the study compares theoretically grounded expectations with empirical findings, aiming to develop analytic generalizations rather than statistical inferences.

To enrich this design, the study integrates the Comparative Case Study (CCS) approach developed by Bartlett and Vavrus (2017), which enables a processual, multi-sited, and relational analysis. Unlike traditional case studies bounded by firm-level perspectives, CCS traces the phenomenon—here, the development of internationalization strategies—across actors, places, and scales. This framework allows the research to connect firm-level choices to broader institutional and policy environments, and to investigate how different forms of embeddedness—formal or informal—mediate access to export opportunities.

Following Bartlett and Vavrus (2017), the comparative analysis is structured along three analytical axes:

1. Horizontal axis: compares two SMEs operating in the same sector and macro-environment, but embedded in structurally different network configurations;
2. Vertical axis: examines how firms interact with institutional and policy actors at local, national, and international levels, including trade promotion bodies and certification authorities;
3. Transversal axis: reconstructs the historical evolution of each firm's internationalization, identifying key turning points, adaptations, and relational learning processes over time.

The purpose is not to evaluate which firm performs “better,” but to explore how organizational configuration and embeddedness shape the pathways through which SMEs build legitimacy, reduce uncertainty, and access global markets.

### **2.3 Case Studies Selection**

The case study design adopted in this research is guided by a logic of theoretical replication (Yin, 2011; Ridder, 2017), which emphasizes the analytical potential of contrasting cases to refine or test theoretical propositions. Rather than seeking statistical generalization, this approach pursues analytical generalization, allowing theory to be strengthened through the observation of divergent empirical configurations. As Ridder (2017) argues, case studies can offer robust theoretical contributions when they explicitly link theoretical constructs to empirically observable differences and similarities across cases. For this reason, the selection of cases is not based on representativeness or randomness, but on their expected ability to generate theoretically relevant variance.

In this study, two Italian agri-food SMEs were selected as contrasting cases of organizational and relational embeddedness.

The first case, *Salumificio di Genga*, is located in a small village in the Marche region and operates independently from any formal collective structure. Its internationalization pathway has been developed autonomously, through project-based initiatives, ad hoc partnerships, participation in trade fairs, and the cultivation of direct relationships with institutional and commercial actors. The second case, *Morgante Srl*, is based in Friuli Venezia Giulia and operates within the institutional framework of the *Consorzio del Prosciutto di San Daniele*, a PDO (Protected Designation of Origin) consortium. While the consortium does not offer operative support for export planning or partner selection, it plays a strategic role in collective marketing and reputational signalling, offering its members greater international visibility through EU-funded campaigns and coordinated brand promotion. This affiliation can act as a reputational facilitator, enhancing the firm's credibility with foreign distributors and institutional buyers.

Despite these structural differences, the two firms share several key characteristics that support a valid and focused comparison: both operate in the cured meat sector, are family-owned, and qualify as SMEs under the EU definition. They are embedded in regional production cultures with strong food traditions, and both intensified or restructured their internationalization strategies between 2015 and 2025, providing a comparable temporal frame. Moreover, both firms engage with export-promotion institutions—albeit through different channels—which makes their institutional interactions analytically comparable. Theoretically, this comparison allows the investigation of how different forms of institutional embeddedness and network structures condition the internationalization trajectories of SMEs. The logic of case contrast is structured around two main analytical dimensions, consistent with Knight (2015):

- “Community”, defined as the presence or absence of structured collective affiliation (e.g., participation in a consortium or formal association);
- “Structure”, referring to the modality and intensity of institutional embeddedness—whether codified and reputationally anchored (as in EU certifications and formal campaigns) or flexible and informally constructed (as in project-based partnerships and individual initiatives).

These two dimensions allow us to move beyond simplistic binaries—such as consortia vs. autonomy—by capturing the nuanced ways in which firms are integrated (or not) into collective and institutional networks. A firm may lack formal affiliation (*community*) but still

be embedded through stable, informal ties or episodic institutional interactions (*structure*), while another may combine both dimensions.

The aim is not to evaluate the relative success of either model, but to explore how organizational configuration interacts with external environments to shape SMEs' capacity to build legitimacy, access resources, and reduce uncertainty in international markets. Within this framework, the two cases function as theoretically contrasting exemplars, allowing the research to test the explanatory capacity of Social Capital Theory (Adler & Kwon, 2002; Nahapiet & Ghoshal, 1998) and Contingency Theory (Donaldson, 2001; Child & Hsieh, 2014) when applied to the internationalization of agri-food SMEs in a highly codified sector like Italian cured meats.

## **2.4 Data Collection Methods and Analysis Strategies**

This study adopts a triangulation strategy aimed at integrating multiple sources and theoretical dimensions into a coherent interpretive framework (Carter et al., 2014).

The initial stage of analysis involves thematic coding of all interview transcripts and internal documents. Codes are developed deductively, drawing from the integrated theoretical framework: from Social Capital Theory, the coding focuses on bonding, bridging, and linking ties; from Contingency Theory, attention is directed toward the fit between organizational structures and environmental demands, as well as between resource configurations and strategic tasks. To support the coding process, the analysis will be conducted using NVivo, a qualitative data analysis software that enables structured and transparent management of codes, themes, and document excerpts (Brandão, 2015).

In the second phase, coded findings will then be reorganized along the four key analytical indicators adopted in the study: market access strategy, strategic transition toward internationalization, partner selection and network evolution, and export-oriented innovation and adaptation. These categories serve as the structural axes of an interpretative comparative grid, where each cell juxtaposes the theoretical expectations derived from the literature with the empirical evidence gathered from the two case studies (See Table 1). This structure facilitates the identification of convergence, divergence, and potential refinement across firms and dimensions.

The third phase of the analysis consists of a narrative reconstruction of each firm's internationalization trajectory. This step moves beyond categorical comparison, aiming to

reconstruct the processual and relational dynamics through which strategic decisions were made, interpreted, and adapted over time. In line with Knight’s (2015) emphasis on depth and plausibility, the case narratives are used to illuminate the complex interaction between firm behavior and institutional environments.

The final analytical step is pattern matching, following Yin’s (2011) logic of analytic generalization. Empirical configurations are compared with the study’s theoretical propositions to assess whether they are supported, challenged, or refined in light of observed dynamics. The objective is not to test predictive models, but to generate theoretical insight into how different forms of embeddedness and organizational configuration shape SME internationalization in complex institutional contexts.

Throughout the entire process, the analysis remains iterative and emergent, as suggested by Bartlett and Vavrus (2017). Rather than adhering to a fixed analytical template, the study maintains a reflexive posture that allows new patterns, relationships, or contingencies to surface and be incorporated into the evolving interpretive framework. This analytical openness is particularly suited to uncovering the layered and situated nature of internationalization processes, where structure, agency, and environment intersect dynamically.

**Table 1 – Comparative Matrix of Theoretical Expectations and Observed Patterns across Case Studies**

<b>Indicator</b>	<b>Theoretical Expectation (Consortium-Affiliated Firm)</b>	<b>Theoretical Expectation (Independent Firm)</b>	<b>Observed Pattern (Firm A – Consortium-Affiliated)</b>	<b>Observed Pattern (Firm B – Independent)</b>
<b>Market Access Strategy</b>	Entry facilitated by institutional and collective actors; visibility through PDO campaign	Entry through informal channels and ad hoc initiatives; dependence on direct engagement		
<b>Strategic Transition toward Internationalization</b>	Earlier transition due to reputational capital and	Gradual transition shaped by experimentation and self-driven learning		

	consortium visibility			
<b>Partner Selection &amp; Network Evolution</b>	Broad networks supported by collective platforms; greater bridging capital	Narrower networks based on trust and bonding ties; slower evolution		
<b>Export-Oriented Innovation &amp; Adaptation</b>	Codified product standards aligned with consortium requirements; limited flexibility	Flexible adaptation based on feedback, experience, and consumer interaction		

*Source: Own Elaboration*

## 2.5 Validity, Triangulation and Limitations

To ensure the validity and trustworthiness of the findings, the study adopts multiple strategies for methodological rigor, in line with qualitative research standards and the logic of comparative case study design. As already mentioned, the analysis relies on triangulation across data sources and methods, combining interview transcripts, internal documents, and contextual materials to establish converging lines of evidence (Yin, 2011; Carter et al., 2014). This triangulation strengthens the internal coherence of each case narrative and minimizes the risk of relying on single informants or isolated episodes.

The study also employs member checking to enhance credibility. Preliminary case reconstructions and timelines are shared with key informants to clarify ambiguities and confirm factual accuracy. An audit trail is maintained throughout the coding and analytical process: coding decisions, thematic categories, and interpretive choices are documented systematically to ensure transparency and reproducibility. The research process is further supported by peer debriefing, including regular discussions with the academic supervisor and co-supervisor.

In line with Knight's (2015) framework for qualitative validity, the study prioritizes plausibility, contextual depth, and reflexive transparency over predictive accuracy. The goal is

not to test universal hypotheses, but to generate robust, empirically grounded interpretations of how different configurations of embeddedness and governance shape the internationalization of agri-food SMEs. Accordingly, the value of the findings lies in their interpretive strength, not in their generalizability.

This epistemological stance aligns with the Comparative Case Study (CCS) approach of Bartlett and Vavrus (2017), which holds that validity emerges from the richness and consistency of relational explanation rather than from abstract replication or control. Rather than seeking a definitive “truth,” the study acknowledges complexity and variation as inherent to the phenomena under investigation. By foregrounding historical processes, institutional context, and actor perspectives, it offers a situated understanding of SME internationalization that privileges depth over breadth and coherence over coverage.

## **2.6 Interview Protocol and Guide**

To gather primary data for the comparative case study, this research relies on two in-depth semi-structured interviews with senior decision-makers from the selected firms. This method is consistent with the interpretive and theory-driven nature of the research design, as it allows for an in-depth exploration of internationalization strategies, organizational routines, and institutional interactions from the perspective of those directly responsible for shaping them.

The interviewees are:

- Federica Morgante, Export Manager at Morgante Srl;
- Matteo Polli, CEO of Salumificio di Genga;

Both occupy leadership positions and have been personally involved in developing and implementing their firm’s internationalization strategies. Their testimonies provide privileged access to decision-making processes, partner selection logics, and the articulation between internal capabilities and external constraints.

Each interview is designed to last approximately two hours and is conducted in Italian, either in person or via video call, depending on logistical conditions. With the participants’ informed consent, conversations are audio-recorded, transcribed, and subsequently coded thematically in alignment with the analytical framework.

The interview protocol is structured around the study’s four core indicators:

1. Market access strategy ;
2. Strategic transition toward internationalization (e.g., turning points, enabling conditions,

internal and external stimuli);

3. Partner selection and network evolution;

4. Export-oriented innovation and adaptation;

In addition to these thematic domains, the interviews investigate how firms engage with institutional environments—such as trade agencies, regional support schemes, or consortia—and how they position themselves in response to evolving regulatory or market demands abroad. Questions also address participation in trade fairs, public incentive programs, quality certifications, and the use of digital tools to support export efforts.

Given the exploratory nature of the research, continuous dialogue has been maintained with both interviewees throughout the study. This has enabled not only clarification and elaboration of initial responses but also access to supplementary documentation, including marketing materials, corporate presentations, and strategic reports. These additional sources have been instrumental in ensuring the triangulation and robustness of the empirical findings. The complete interview guide is provided in Appendix A.

## **2.7 Ethical Considerations**

This study complies with established ethical standards in qualitative research, with specific attention to informed consent, participant confidentiality, and secure data handling. All interviewees were informed in advance about the academic purpose of the research, the voluntary nature of their participation, and their right to withdraw at any time without consequence. Prior to each interview, participants were asked to sign an informed consent form (see Appendix B), explicitly authorizing the audio recording of the conversation and the use of their responses for academic purposes only.

The transcripts, recordings, and associated notes have been stored in encrypted and access-restricted digital folders, accessible only to the researcher. Any physical notes or printed materials were securely stored and will be destroyed upon completion of the research.

## **2.8 Methodological Limitations**

As with all qualitative case-based research, this study presents several methodological limitations that constrain the scope and applicability of its findings.

Firstly, the comparative analysis focuses on two Italian SMEs operating in the specific sub-sector of cured meats, which limits the statistical generalizability of the conclusions to broader agri-food contexts or to SMEs in other national settings. While both cases were selected for their strategic contrast along theoretically relevant dimensions, the small number of units inherently restricts the breadth of inference.

Second, although both firms fall within the EU definition of SMEs, there exists a moderate asymmetry in terms of organizational size and market reach. This discrepancy is mitigated through matching criteria (sector, export period, family governance), yet it may still influence the comparability of strategic capacities and external positioning.

## Chapter 3

Unless otherwise indicated, the empirical evidence presented in this section draws on primary data collected by the author through semi-structured interviews and complementary e-mail exchanges with representatives of the two companies. The coding schema applied to the interviews is provided in Appendix C.

### 3.1 Case Study: Morgante Srl

Morgante Srl is one of the historical players in the Italian and Friulian cured meat sector, with roots dating back to the second half of the nineteenth century. Over six generations, the company has evolved from a small local butcher's shop into a family-owned industrial enterprise of national relevance in the agri-food sector. Today, Morgante operates through two production facilities: the prosciuttificio in San Daniele del Friuli, dedicated exclusively to the production of the Prosciutto di San Daniele PDO, and the salumificio in Romans d'Isonzo, where a diversified range of products is manufactured, including cooked and cured hams, speck, salami, pancetta, würstel, and other specialties. With 101 employees and a turnover of approximately €28 million in 2024, Morgante positions itself as a small-medium-sized family firm, strongly rooted in its territory and deeply identified with the tradition of Friulian prosciutto.

In recent years, the company has embarked on an expanding international trajectory, with exports reaching €2.35 million in 2024, a 25% increase compared to the previous year. Export activities are managed internally by a family member responsible for both marketing and international sales—an organizational choice that reflects the governance structure of the firm and the desire to maintain direct control over internationalization strategies. This gradual and selective approach has enabled Morgante to consolidate its presence in Europe while also developing commercial relationships in extra-EU markets such as the United States, Singapore, Thailand, and Australia.

Since 1985, Morgante has been a member of the Consortium of Prosciutto di San Daniele, benefiting from the visibility and institutional protection that derive from belonging to a collective brand. Nonetheless, the company maintains a significant degree of autonomy in its

internationalization strategy, building direct relations with distributors and wholesalers abroad and pursuing growth grounded in quality, the reputation of its family brand, and generational continuity. This balance between participation in a collective institution and entrepreneurial independence defines the specificity of the Morgante case, which can be understood as an intermediate model between institutional cooperation and autonomous strategic initiative.

### **3.1.1 Empirical Insights from the Interview: Social Capital and Contingency Dimensions**

The interview with Federica Morgante, the Export Manager of Morgante Srl, conducted in Italian and lasting approximately ninety minutes, provided rich insights into the role of social capital in the company's internationalization strategy. Drawing on Social Capital Theory, the coding process identified three main dimensions: bonding, bridging, and linking ties (Putnam, 1993; Burt, 2000; Aldrich, 2020). Each of these forms of social capital offers a different lens to interpret how the firm mobilizes relationships as resources for international expansion. Bonding ties represent strong and trust-based relationships within close-knit networks, such as family and long-term partners (Putnam, 2000). In Morgante's case, family governance is central: the brand is directly associated with the family name, and this identity is embodied in personal interactions with clients abroad. As Federica Morgante explained, *"When I go abroad I am Federica Morgante from Morgante Srl, and they immediately connect the product with me. There is Morgante on the label, and I am Morgante – for them this is 'wow!'."* She emphasized how foreign clients particularly value the personal presence of a family member: *"In Australia they say: 'It's wonderful that you came yourself to visit us at the restaurant!'"* This personalization generates authenticity and continuity, as she noted, *"If I suddenly sent someone else in my place, it wouldn't be the same. They see the tradition, the family story, the Italian continuity... and that is what they appreciate."* This dynamic reflects the concept of familiness as a unique resource that strengthens trust in international markets (Zellweger, Eddleston & Kellermanns, 2010), consistent with broader evidence on how family firms leverage continuity and identity for credibility abroad (Arregle et al., 2021). Bonding ties therefore act as a source of credibility and trust, allowing the company to differentiate itself from larger competitors and to consolidate long-term relationships in markets such as France and Australia. Bridging ties, by contrast, extend networks beyond the immediate circle, connecting the firm to new opportunities and external actors (Putnam, 1993; Burt, 2000). Morgante has developed

bridging capital both intentionally and through serendipitous events. The entry into the Australian market, for instance, was facilitated by the difficulties of another producer: *“We were lucky in Australia because a big producer had problems... one of their importers came to us, and it started with a small test order of ten cartons. Step by step the market grew and became consolidated.”*

Such serendipitous bridging is illustrative of the “strength of weak ties” (Granovetter, 1973), which allow access to new, non-redundant opportunities. Comparable evidence shows how SMEs systematically use network ties to overcome resource constraints in early internationalization (Freeman, Edwards & Schroder, 2006).

At the same time, bridging connections were pursued through systematic client research: *“I started by contacting lists of distributors and wholesalers in Europe... the fact that we produce San Daniele was an important calling card.”* This illustrates the role of bridging capital in providing access to networks outside the immediate circle of family and long-term partners (Ramos-Pinto, 2012). By leveraging the reputation of the San Daniele PDO, Morgante was able to capture the attention of foreign wholesalers who might otherwise have ignored a medium-sized family firm: *“If I had written ‘I produce salami,’ I would not have received the same responses. But by introducing myself as part of the San Daniele Consortium, interest was immediately created.”*

The bridging process was not limited to cold contacts but also involved building relationships with distributors who could offer market entry opportunities. Federica Morgante described how this approach gradually transformed initial interactions into durable partnerships: *“Step by step, with small trial orders, we started to build the export market.”*

Trade fairs also played a role in developing bridging ties, although in a highly selective manner. Rather than investing heavily in large stands, Morgante adopted a targeted strategy: *“In fairs like Anuga I usually go as a visitor, meeting existing clients, seeing novelties, and arranging targeted meetings. If you are not well-structured, investing in a stand is too costly and risks being invisible.”* This demonstrates a cautious and pragmatic approach: connections are sought, but always filtered through considerations of coherence, cost, and strategic fit in the situation.

Finally, bridging ties were reinforced by collaboration with distributors abroad, who assumed responsibility for local promotion: *“In Australia it makes more sense to rely on our distributor, who organizes stands and fairs locally. We support them with promotional material or products, but our priority is to consolidate relationships, not to grow rapidly.”*

Here, bridging capital is not merely transactional but relational, emphasizing trust, mutual support, and shared responsibility between producer and distributor.

From a theoretical perspective, these examples confirm that bridging ties provide access to heterogeneous networks and opportunities (Putnam, 1993; Burt, 2000), but in Morgante's case, such ties are mobilized selectively and incrementally. Rather than pursuing indiscriminate expansion, the company carefully chooses which networks to activate, privileging quality of relationships over quantity. This reflects a strategic combination of bridging capital that allows the firm to cautiously expand its international presence while preserving coherence with its family-based identity and values.

Linking ties denote vertical connections between firms and institutions or regulatory authorities, through which companies gain legitimacy, resources, and access to markets (Szreter & Woolcock, 2004). For Morgante, these ties are primarily embodied in its membership of the Consorzio del Prosciutto di San Daniele, which functions as an institutional framework for all 31 producers. The Consortium provides visibility and recognition that an individual firm could not achieve on its own: *"The Consortium acts as a collective umbrella: every promotional activity benefits all producers indirectly, but in the end each company must build its own client base."*

Beyond symbolic legitimacy, the Consortium supplies crucial technical and regulatory support. Federica Morgante emphasized the importance of the internal export portal: *"In the export section of the Consortium's portal you find, country by country, the sanitary certificates and restrictions. During the swine fever crisis, it was immediately updated with blocked or reopened markets."* This centralized resource reduces uncertainty in navigating complex and constantly changing international regulations, functioning as a practical instrument. In line with this, export consortia operate as institutionalized forms of social capital, codifying solidarity into formal organizational routines (Valentinov & Iliopoulos, 2021) and facilitating collective market access (Forte & Oliveira, 2019).

The Consortium also plays an essential role in collective promotion and marketing, absorbing costs that would be prohibitive for small and medium-sized firms. As Morgante explained: *"Last year the Consortium organized a campaign in the Italian press, and now one is planned abroad... these are costs we could never afford alone."* In recent years, such campaigns have included events, tastings, and communication on social media, initiatives that create reputational spillovers for all members: *"The Consortium invests a lot in communication, especially on social networks, and this generates visibility for individual producers too."* These activities demonstrate how this institutional network allows smaller

firms to benefit from scale economies and to access arenas—such as high-profile advertising or national media—that would otherwise remain inaccessible.

At the same time, linking ties also serve as a mechanism of regulation and control.

Moreover, the Consortium imposes strict standards on labelling and packaging to protect the authenticity of the PDO and prevent Italian sounding practices: *“Every label must be approved by the Consortium – whether it is our brand or private label – to ensure compliance and guarantee that what is sold as San Daniele is truly produced in San Daniele.”* This regulatory oversight extends to certification for foreign markets, where only producers meeting specific requirements may export. For example, obtaining FDA approval in the 1980s was described as a long and complex process, but one that provided an enormous advantage in accessing the U.S. market: *“The FDA is a true mark of quality because it imposes very strict standards. Having it today is a huge advantage, especially in the current geopolitical context.”*

These examples illustrate how the membership to the Consortium simultaneously enables market access and visibility while also constraining firms through strict rules and certifications. For Morgante, *“the Consortium’s role is indispensable in maintaining the collective reputation of the PDO, and to promotional campaigns, yet it does not substitute our own internationalization strategies”*. As Morgante summarized, institutional support is valuable but limited: the Consortium can provide legitimacy, promotion, and regulatory clarity, but each firm must ultimately negotiate, adapt, and consolidate its own relationships abroad.

The coding of Morgante’s interview also highlighted how firms need to align their internal structures and resources with the demands of their external environment in order to remain effective (Donaldson, 2001; Burton & Obel, 2018). A recurrent theme in the interview is Morgante’s capacity to adapt strategies to the specific characteristics of different markets. In consolidated markets such as France, the company deliberately chooses a selective and cautious strategy: *“In France I only work with five wholesalers – I could have done more, but I prefer selective and coherent growth.”* This approach reflects the firm’s preference for long-term, trust-based partnerships rather than rapid expansion. In contrast, new or more distant markets are approached with incremental experimentation: *“In Canada or Japan we proceed step by step, testing the market slowly.”* Australia illustrates a more advanced stage of adaptation, where the company has gone beyond occasional sales to structuring the market around distributors, events, and brand promotion: *“For me, shipping to Austria is just selling things abroad, but covering Australia with distributors, events, and building a brand – that is*

*real export, when you start structuring the market for growth.*” The interview also reveals how external shocks require ongoing adaptation. For example, geopolitical disruptions in global shipping routes have directly affected export logistics: *“For months the Suez Canal has been closed, so ships going to Australia had to circumnavigate Africa, adding fifteen days to the journey and increasing costs of fuel and refrigeration.”*

The firm’s organizational choices also reflect the search for alignment between resources and strategic tasks (Luthans & Stewart, 1977). Morgante prefers to keep export management in-house, ensuring coherence and direct control: *“Export and marketing are managed internally by a family member, not outsourced. This way, I can personally follow clients and make decisions directly.”* However, external resources are occasionally mobilized to complement internal capabilities. For example, the company collaborated with a Temporary Export Manager (TEM) in France and Scandinavia: *“With the TEM I received a list of 40 contacts, but only five were really suitable... those few turned out to be useful and concrete. The key is coherence: proposing the right product to the right client.”* This selective use of external expertise demonstrates a contingent logic: outsourcing specific tasks for market scouting while retaining the strategic core in-house. The same reasoning applies to logistics. Rather than developing its own transportation infrastructure, Morgante relies on specialized logistics companies, but with strong oversight from management: *“We rely on external logistics firms that load our products and deliver them abroad. With major clients like Australia or the US, I negotiated directly with brokers to find the right costs and containers. Everything was managed in-house, no outsourcing – very Friulian, but effective.”* This combination of external operational resources and internal control illustrates how the firm balances flexibility and autonomy. This selective balancing of internal control with occasional outsourcing resonates with Child and Hsieh’s (2014) argument that SMEs align decision modes with informational contingencies, while also supporting configurational perspectives that highlight equifinal pathways to international success (Campagnolo, Gianecchini, & Mosca, 2023).

### **3.1.2 Structuring Empirical Evidence: Four Analytical Indicators**

In order to systematically analyse the internationalization processes of the selected firms, four analytical indicators have been identified. These dimensions, as previously illustrated in Chapter 2, derive from the theoretical framework that integrates insights from organizational

studies and social capital theory. They provide a structured lens through which empirical evidence can be organized and compared, allowing for consistency across case studies. The first indicator, market access strategy, captures the combination of channels, intermediaries, and tools through which firms attempt to enter and position themselves in foreign markets. The second, strategic transition toward internationalization, highlights how companies evolve from occasional export activities to a more deliberate and structured international orientation. The third, partner selection and network evolution, examines the nature and trajectory of external relationships with commercial, institutional, and promotional actors. Finally, export-oriented innovation and adaptation considers how firms modify products, packaging, narratives, or processes to meet the expectations of foreign consumers and buyers.

### ***3.1.2.1 Market Access Strategy***

Morgante's market access strategy is marked by gradualism, selectivity, and the pragmatic use of available opportunities and institutional resources. Rather than pursuing indiscriminate expansion, the company carefully calibrates its choices according to familiarity with the product, market potential, and the firm's own organizational capacity. This approach reflects a logic in which market entry is structured step by step and adapted to the conditions of each environment (Schweizer, 2012).

In its early internationalization efforts, Morgante focused on markets geographically and culturally proximate, where consumers already had knowledge of Italian cured meats. As Federica Morgante recalled: *"The choice of countries was local at first, primarily for reasons of proximity and product familiarity. Therefore, those markets where consumers already eat and know not only San Daniele, but Italian cured meats in general."* Such markets minimized risk and created a foundation for further expansion.

Beyond this first stage, Morgante complemented proximity with systematic client scouting. Morgante explained how she relied on online searches and institutional support: *"ICE... they are the first to give you help and support if needed. They provide you with a list of wholesalers or importers you can contact for each country."* This illustrates how the company mobilized bridging connections through both individual effort and selective engagement with institutional actors.

Trade fairs, often considered crucial entry points for SMEs, were approached in a highly selective manner. Morgante emphasized that participating with large stands in international exhibitions such as SIAL or Anuga would be too costly and ineffective for a medium-sized family firm. Instead, Morgante chose to leverage existing distributors in consolidated markets like Australia: *“In Australia, a market consolidated over ten years, it makes more sense to rely on the distributor: they organize stands and fairs locally, while we provide promotional material or samples and participate in support.”* This strategy shows how external partners were mobilized to optimize visibility while keeping costs under control.

Morgante also pointed to the structural weaknesses of Italy’s fragmented promotional system: *“In France or Spain the country brand is pushed, while we promote the individual winery or region. The same happens in fairs: ICE, regions, chambers of commerce, business networks... all separately, without coordination. This creates duplication and inefficiencies, even if sharing costs can sometimes be useful.”* In this sense, market access is not only a matter of firm-level strategy but also of systemic conditions that either strengthen or weaken collective representation abroad.

Finally, the company’s approach to expansion is deliberately incremental. As Morgante noted, *“Small companies have the advantage of not being in a hurry to grow. It took us ten years, but it was a healthy and solid growth.”* This long-term orientation reflects a strategy that privileges relationship building, credibility, and steady consolidation over short-term volume increases.

Taken together, these insights show that Morgante’s market access strategy rests on a careful balance between proximity and exploration, institutional support and individual initiative, consolidation and selectivity. It is a model that underscores the importance of gradual expansion, coherent positioning, and relational trust in building sustainable internationalization pathways for SMEs.

### ***3.1.2.2 Strategic Transition toward Internationalization***

The second dimension concerns the firm’s internal transition from occasional export activities to a more structured international orientation. This process reflects the adjustments required for small firms to align internal resources with the demands of international markets. At Morgante, the transition was gradual, involving an accumulation of competences, procedures, and organizational routines that enabled the company to sustain and expand its international presence.

The first stage of this transition was largely technical and bureaucratic. Federica Morgante recalled: *“The first thing I did was to work with the quality office to understand certifications, mandatory information required by foreign laws, labels, etc.—to see if the company was able to comply.”* This initial phase focused on ensuring regulatory compliance and developing the necessary documentation. It was followed by systematic preparation of multilingual materials: *“I worked on technical sheets, catalogues, translations of brochures and flyers before printing them for company presentations in German.”* Though described as tedious, this investment created a long-term asset: *“The first period was very boring and bureaucratic, but very useful for the company to create and have a data folder (e.g. translated documents) to provide to external firms.”* These activities illustrate how organizational routines were adapted to meet external requirements, marking the first step toward international readiness. A second stage involved experimenting with external expertise to complement internal resources. The introduction of a Temporary Export Manager (TEM) represented a turning point in Morgante’s internationalization trajectory. As Morgante explained: *“In recent years I started a project with a consulting company for a TEM, first in France and then in Scandinavian countries. Unlike in the past, today the company is more structured... I had very positive feedback.”* The TEM provided market intelligence and pre-screened contacts, which facilitated a more strategic approach to partner identification. Nevertheless, selectivity remained key: *“With the TEM I received a list of 40 contacts, but only five were really suitable... those few turned out to be useful and concrete.”* These experiences underscore that the firm’s transition toward internationalization was neither linear nor uniform. It was built through incremental steps: first by creating the internal technical and linguistic infrastructure, and later by strategically engaging external expertise. This process reflects a balance between autonomy and outsourcing, where external tools are mobilized to accelerate internationalization but always filtered through coherence with the firm’s identity, values, and strategic orientation.

### ***3.1.2.3 Partner Selection and Network Evolution***

A third analytical dimension concerns how Morgante selects its partners and cultivates relational networks abroad. The firm’s approach highlights how personal credibility, family continuity, and long-term trust act as critical drivers in the evolution of its networks. One of the most distinctive aspects is the direct identification between the family and the brand,

which transforms every business interaction into a personal connection. As Morgante explained: *“When they ask me about the product, they know I am not inventing a story. This is something that abroad is highly appreciated, unlike in Italy.”* This authenticity provides foreign clients with reassurance that the relationship is rooted in genuine expertise and direct accountability.

Generational dynamics also play a role. Morgante reflected on how her personal identity was perceived differently in domestic and foreign contexts: *“Regarding the fact of being young... while in Italy, for the first years, I was seen as ‘the daughter of...’, abroad people were truly enthusiastic.”* This shows how the company’s international networks value freshness and continuity, interpreting her role as a guarantee of renewal rather than dependency.

Beyond personal identity, the family-based nature of the firm is itself a powerful asset. As Morgante noted: *“They see continuity, they see Italian history... traditions, products handed down, quality, the business being passed on within the family.”* In this sense, heritage and continuity become forms of symbolic capital that strengthen partnerships and create lasting bonds (Zellweger et al., 2010).

At the same time, these relationships are not easily transferable. Morgante acknowledged the irreplaceability of her personal involvement: *“I realize that if one day I sent someone else in my place... it wouldn’t be the same.”* This highlights how trust in international markets is often personalized, making the family’s direct presence a cornerstone of partner loyalty.

The same selectivity also characterizes Morgante’s choice of distributors. In Australia, for example, the company works with a single trusted distributor covering several areas. This decision reflects both the importance of long-term loyalty and the sensitivity of distributor relations abroad. As Morgante observed: *“Big companies sell to anyone, and most distributors abroad are Italian... they are very touchy. I, instead, focus on those left behind by companies chasing turnover—wholesalers who value quality, family businesses with long-term projects, and partners who care about personal relationships. That is where I build my competitive space.”*

This strategy demonstrates how network evolution is not just about expanding contacts, but about cultivating coherence and relational trust. By deliberately avoiding fragmented relationships, Morgante reinforces stable partnerships that are mutually beneficial and resilient over time.

#### **3.1.2.4 Export-Oriented Innovation and Adaptation**

The fourth analytical indicator highlights how Morgante has adapted its operations, products, and organizational practices to meet the specific demands of international markets. For SMEs, export-oriented innovation often takes the form of incremental adjustments rather than radical change, but these adjustments are crucial for sustaining competitiveness abroad.

A first area of adaptation concerns logistics, which required the company to learn new practices and negotiate with specialized partners. As Morgante recalled: *“To organize logistics, I started to study how other companies worked abroad. I saw that many relied on external transport firms, and we adopted the same system. Today we rely on external logistics firms that load our products and distribute them, while we negotiated pallet prices to have transport costs ready when clients requested a quote.”* This illustrates how Morgante integrated external expertise while maintaining internal oversight, ensuring flexibility without losing control.

Export activities also required practical adjustments to meet country-specific regulations and consumer preferences. Product formats, for example, were adapted to respond to sanitary expectations: *“In some countries there is a preference for boneless products, especially for hygienic reasons. Today the most sold format is precisely the boneless ham, because it is ready to use.”* Similarly, the U.S. market imposes particular requirements: *“Americans do not want the trotter, even if after processing it does not involve contamination risks. They also only accept certain certified slaughterhouses.”* These adaptations demonstrate how product innovation was oriented not at altering the core identity of San Daniele, but at fine-tuning presentation and compliance to align with international standards.

Labeling and branding further highlight the balance between innovation and regulation. Morgante maintained its own brand identity while also producing for private labels, ensuring traceability through QR codes and identification systems. Yet, as Morgante explained, this flexibility is tightly regulated: *“The Consortium has strict rules on structure, fonts, and graphics, and every label—whether with our brand or a private label—must be approved before being used. This is an additional safeguard, especially against Italian sounding.”* Here, adaptation is embedded within institutional frameworks that both enable and constrain innovation.

Certification systems represent another layer of adaptation, where regulatory compliance becomes a competitive asset. Morgante stressed the importance of having obtained FDA approval: *“The FDA is considered a true mark of quality, because it imposes very strict*

*standards. Having it today is a huge advantage, especially in the current geopolitical context.*” In this sense, institutional recognition is not only a barrier but also a resource that allows the firm to signal quality and reliability in sensitive markets.

Finally, the company has had to cope with external shocks that reshaped export conditions. During the Covid-19 pandemic, activity slowed but remained resilient due to the food sector’s relative stability. More recently, geopolitical disruptions have posed new logistical challenges: *“The Suez Canal has been closed for months, so ships going to Australia had to circumnavigate Africa, adding fifteen days to the journey and increasing fuel and refrigeration costs.* “These events show how internationalization requires continuous adaptation, where operational resilience and flexibility are as crucial as product quality. Taken together, these examples illustrate that export-oriented innovation at Morgante is multi-dimensional: it involves logistics, product formats, labelling, certifications, and crisis management. Adaptation is not a one-time adjustment but an ongoing process, allowing the firm to maintain compliance, credibility, and competitiveness in a constantly shifting global environment.

### **3.1.3 Narrative Reconstruction**

The internationalization of Morgante can be reconstructed as a gradual and path-dependent process, moving from a strong regional base to consolidated European markets and eventually to extra-EU expansion. This trajectory was shaped not by rapid breakthroughs, but by incremental decisions grounded in family governance, relational trust, and selective engagement with external opportunities.

The firm’s starting point was firmly rooted in the Friulian tradition of San Daniele production. Early international steps focused on neighbouring European markets, chosen for their geographical proximity and consumers’ familiarity with Italian cured meats. These first export activities were supported by technical preparation—such as the translation of catalogues, compliance with foreign regulations, and the creation of a standardized “data folder”—which equipped the company to interact credibly with foreign partners. Consolidation in Europe, particularly in France and Germany, provided Morgante with its first sustained export base, where the emphasis was on selective growth and long-term partnerships rather than maximizing volume.

The opening to extra-EU markets followed a different dynamic, where serendipitous opportunities intersected with deliberate strategic adaptation. The Australian market exemplifies this phase: a gap left by a larger competitor created an entry window, which Morgante seized with small trial orders before consolidating through a trusted distributor. Over time, this developed into a highly structured presence, with distributors organizing local events and the company reinforcing visibility through targeted promotional support. For Morgante, this was the moment when “export” evolved from occasional sales into a structured internationalization process, involving brand promotion and strategic market coverage. Throughout this trajectory, trade fairs, the Consorzio del Prosciutto di San Daniele, and the family-based management model acted as key enabling mechanisms. Trade fairs, although not exploited through large stands, were used selectively as platforms for relationship-building and scouting, often in collaboration with distributors. The Consortium provided legitimacy, regulatory support, and collective promotion, allowing Morgante to access information, certifications, and visibility that would have been unattainable alone. At the same time, family governance ensured coherence and authenticity: the direct presence of Federica Morgante abroad, the association of the brand with the family name, and the emphasis on tradition all reinforced credibility and authenticity in foreign markets. Relational dynamics are central to this narrative. Morgante’s strategy contrasts sharply with the aggressive, volume-driven approach of larger producers. Instead of competing head-on, the company cultivated niches where quality, trust, and personal attention mattered most. As Morgante noted, many large firms “leave behind” clients in pursuit of turnover, and it is precisely with these wholesalers—family firms with long-term projects and attention to human relationships—that Morgante has built its space of competitiveness.

### 3.2 Case Study: Salumificio di Genga

Salumificio di Genga is a family-owned small enterprise founded in 2000 by Fabrizio Polli and Paola Luzi, emerging from the reconversion of a local cooperative originally specialized in fresh pork meat sales. Located in Meleto, in the heart of Genga (Marche region), the company gradually shifted its business model toward the processing and aging of high-quality cured meats.

Following the construction of its first proprietary production site in 2006 and the opening of a new facility in 2018, the company strengthened its position in the sector by investing in process certifications (IFS, BRC, AIC) and technological innovation. Today, the firm employs 22 internal collaborators and operates under a lean governance structure, with decision-making shared between the founding generation and the second generation of the family.

The company's turnover grew from approximately €2 million in 2001 to nearly €7 million in 2024, with more than 90% generated from branded cured meat products sold in pre-packaged formats. The main sales channel is large-scale retail distribution (GDO), with consolidated partnerships with major national players such as Coop Alleanza 3.0, Conad, Eurospin, Despar, Marr, and others. At the same time, the company has initiated a process of internationalization, securing the certifications required to access highly regulated markets such as Canada and Japan, while also building stable relationships with distributors in Belgium, the Netherlands, and France.

Salumificio di Genga preserves a strong artisanal and territorial identity, offering a diversified product portfolio ranging from traditional prosciutti and salami to innovative lines such as IGP-certified bresaola, flavored *Salamini Frasassi*, and low-salt cured meats. Investments in research and development, sustainability, and production capacity expansion are central to its growth strategy, with the company aiming to present its first sustainability report and obtain ISO 14001 environmental certification by 2025.

Today, Salumificio di Genga positions itself as an innovative firm rooted in the Marche region yet increasingly oriented toward foreign markets, combining artisanal tradition, technological know-how, and a growth trajectory built on quality, trust, and long-term relationships.

#### 3.2.1 Empirical Insights from the Interview: Social Capital and Contingency Dimensions

The interview with Matteo Polli, CEO of the Salumificio di Genga, which lasted around one hour, reveals how social capital has been mobilized at different levels in the company's still-

initial phase of internationalization. As already anticipated, the firm's origins are rooted in a family-based governance model, which has remained central to its identity and strategic orientation. As Polli recalled, *"Our company was born from the legacy of a cooperative whose core business was fresh meat, with very limited processing. My father joined in the 1980s as a factory worker, where he gained extensive experience. When it became clear that there would be no generational succession within the previous family owners, he saw an opportunity. In the early 2000s, supported by the bank and in a market context far less complex than today, he acquired the company and reshaped its business model."*

Bonding ties have provided the backbone of this trajectory, ensuring credibility and resilience during moments of transformation. The shift from fresh meat to salumi production after the 2008 financial crisis exemplifies the role of strong internal cohesion: *"between 2008 and 2012 there was a strong decline in turnover, and fresh meat was gradually abandoned. From then on, we concentrated on the core business of salumi."* This capacity to realign the business while preserving trust and continuity reflects the embedded logic of family governance (Zellweger et al., 2010). Moreover, it highlights how local social capital sustains entrepreneurship and resilience during periods of crisis (Westlund & Bolton, 2003).

Importantly, these bonding ties also extend into export activities. As Polli observed, *"abroad you need long paths to build loyalty, but once they recognize that the company is serious and a stable supplier, they will stay with you, unlike in Italy where the market is more unstable."*

The family's presence and long-term orientation have shaped internationalization as a cautious and relational process, privileging trust over rapid expansion.

Bridging ties have been essential to open new channels beyond the immediate circle of family and local partners. A significant moment came with the company's participation in international fairs, supported by ICE, which enabled connections with importers and distributors. At Toronto in 2018, Polli noted, *"our product attracted great interest for its craftsmanship and taste. ICE supported us concretely, organizing travel, putting us in contact with restaurants and importers, and showing us the right addresses."* These bridging dynamics confirm that SME internationalization is often mediated by external network relationships and foreign intermediaries (Coviello & Munro, 1997).

Yet bridging ties also revealed the structural challenges of markets where consumer habits differ: *"we realized that Canadian consumers, despite their high per capita GDP, lacked the culture of spending for quality food. Italian sounding and low-quality products, very similar in name and packaging to authentic ones, created a significant divide."* These experiences

underline how weak ties can create openings but require long-term cultivation to overcome institutional and cultural barriers (Nahapiet & Ghoshal 1998; Adler & Kwon 2002).

Other initiatives proved more successful. Participation in the International Food Exhibition in London facilitated B2B contacts, even though Brexit undermined prospects. More decisive was the 2019 entry into Belgium and the Netherlands through Sitadis: *“in Belgium and the Netherlands we found our first stable foreign market, with results of around €250,000–300,000 and very positive prospects. The context was favourable thanks to the presence of many Italians emigrated in the 1950s and 1960s who had preserved a strong food culture”* This collaboration allowed the company to penetrate the entire Benelux region, while further distributors expanded presence into France. Such partnerships illustrate how bridging ties provide access to heterogeneous opportunities, connecting the firm with communities and intermediaries that value artisanal quality and heritage.

Linking ties have been particularly important in providing legitimacy, resources, and technical knowledge. In recent years, Salumificio di Genga invested heavily in certifications, obtaining IFS and BRC, as well as authorizations for export to Canada and Japan: *“from Japan, for example, medical inspectors came to verify that what we certified in Italy was actually consistent.”* These certifications not only enabled market access but also reinforced the company’s credibility abroad. Institutional support was equally visible in the role of ICE, which facilitated participation in fairs in Toronto and London, and in the assistance provided by banks such as BIPER and Unicredit: *“banks and cooperatives are aware of the difficulty of SMEs, which often do not have a dedicated export office, especially to follow all the bureaucratic requirements abroad, like labelling. Many agencies, including customs ones, now provide services of this kind.”* Linking ties of this type not only provide legitimacy but also help overcome institutional obstacles in foreign markets, a role highlighted in recent comparative studies of SMEs in Europe and Asia (Stojčić, Dabić & Musteen, 2024).

Looking forward, linking ties are also seen as crucial for scaling up the company’s internationalization strategy. Polli emphasized the potential role of SACE SIMEST: *“I have an appointment with SACE SIMEST because we want to develop a strategic plan both in innovation and internationalization. These instruments offer alternative channels to traditional bank credit, in which I have lost confidence.”* These linking ties not only provide legitimacy and technical guidance, but also compensate for the structural weaknesses typical of SMEs in highly regulated markets.

Unlike larger competitors, Salumificio di Genga does not dispose of abundant managerial or financial reserves, which forces the company to constantly recalibrate its structures and strategies to cope with shifting environments (Donaldson, 2001).

One of the clearest expressions of this adaptive logic concerns the evolution of the export function. Initially, the company created a permanent role but later redefined it into more flexible arrangements: *“at the beginning the export figure was permanent. Then we transformed it into a Temporary Export Manager, and the following year into a Digital TEM, so she could create a new network through training courses and be included in programs of grants and investments.”* More recently, the company decided to introduce *“a new internal figure to act as a bridge between the export manager and administration,”* signalling a move toward greater structural formalization as the scale of international activities expands.

Context-related pressures are also evident in the company’s reliance on limited communication and marketing capacities. Polli emphasized that, as an SME, *“we don’t have a structured marketing office; we work with freelancers. SMEs often lack a physical structure that can contact foreign distributors every day with a budget for fairs, flights, and promotion. Large companies can study the market in a more structured way, while for us it is different.”* This gap in resources directly shapes how the firm approaches international markets: it cannot adopt aggressive commercial tactics such as mass discounts or promotional campaigns, but must instead rely on incremental, trust-based growth.

Environmental contingencies also constrain market selection. In London, despite promising B2B contacts, the combined shock of Brexit and local cost structures forced the firm to withdraw: *“the market for high-end Made in Italy is concentrated in luxury shops and large chains, and it is difficult to enter because they are already occupied... London is very expensive, even for local operators, so for them sometimes is not convenient to buy expensive products.”* By contrast, entry into Belgium and the Netherlands proved more viable, precisely because the consumer base was culturally predisposed to value authentic Italian products: *“the context was favourable thanks to the presence of many Italians emigrated in the 1950s and 1960s who have preserved a strong food culture.”* These contrasting cases illustrate how the effectiveness of internationalization strategies relies on cultural, institutional, and economic fit between the product and its market (Luthans & Stewart, 1977). External shocks have further highlighted the company’s need for flexibility. During the Covid-19 pandemic, Genga temporarily suspended its export ambitions: *“our project started in a very particular moment, during Covid, when everything was closed. In that period, we concentrated a lot on Italy, doubling turnover and acquiring many new clients. Today we are*

*resuming internationalization decisively.*” This oscillation between domestic retrenchment and renewed export orientation reflects a pragmatic alignment to circumstances rather than a linear growth model.

Finally, institutional and technological supports are incorporated as adaptive tools to reduce uncertainty and compensate for internal limitations. Polli stressed the importance of working with a new strategic consultant *“to avoid shooting randomly and instead identify the best partners,”* as well as exploring innovative instruments such as MatchPlant: *“a software using AI to study markets... I believe this will be the future, helping to bridge the gap that until a few years ago seemed unbridgeable.”*

### **3.2.2 Structuring Empirical Evidence: Four Analytical Indicators**

#### ***3.2.2.1 Market Access Strategy***

The initial stages of Genga’s internationalization were characterized by exploratory openings, strongly mediated by institutional actors such as the Italian Trade Agency (ICE). These channels provided visibility and facilitated first contacts abroad, as Polli explained: *“With ICE we went to Toronto; our product attracted great interest for its craftsmanship and taste. ICE supported us concretely, organizing travel, putting us in contact with restaurants and importers, and showing us the right addresses.”* Yet, these experiences also exposed the structural challenges of competing in foreign markets. In Canada, the company encountered a consumer base with high purchasing power but limited willingness to invest in quality food, where *Italian sounding* and low-price imitations created a significant barrier to penetration. In London, ICE support again generated B2B meetings, but the market context proved even less favourable: *“The market for high-end Made in Italy is concentrated in luxury shops and large chains, and it is difficult to enter because they are already occupied... London is very expensive, even for local operators, so for them sometimes it is not convenient to buy expensive products.”*

By contrast, Belgium and the Netherlands offered a more fertile environment. Cultural proximity, the presence of a large Italian diaspora from the 1950s and 1960s, and the support of a trusted distributor enabled the firm to secure its first stable market abroad. Turnover in the Benelux region has stabilized between €250,000 and €300,000, marking a tangible though still modest foothold. This divergence across destinations demonstrates that market access

strategies depend not only on institutional facilitation but also on the interplay of cultural familiarity, consumer habits, and network embeddedness, which can either accelerate or obstruct sustainable internationalization.

### ***3.2.2.2 Strategic Transition toward Internationalization***

The trajectory of Salumificio di Genga cannot be described as linear or consolidated; rather, it remains in an experimental and adaptive phase. Instead of following a stable model of market expansion, the firm has alternated between different channels and approaches, searching for the right balance between internal capabilities and external opportunities. Institutional support through ICE generated visibility in Toronto, London, and Belgium, while collaboration with SACE SIMEST signalled an emerging willingness to design a more structured plan. However, these initiatives have so far produced fragmented results, highlighting the gap between intention and consolidation.

Internally, the export function has been subject to successive reconfigurations: initially handled in-house, later outsourced to a Temporary Export Manager, and most recently transformed into a Digital TEM to expand network linkages and access training and public funding programs. As Polli stressed, *“We plan to open an export office, because export absolutely needs to start following a clear path.”* These choices reflected the firm’s awareness that internationalization requires dedicated competences and resources, which the company does not yet fully command. At present, Genga recognizes internationalization as a strategic necessity, but its organizational structure is still in transition. The allocation of budget for a new figure bridging export and administration, and the explicit plan to create a dedicated export office, confirm that the firm is moving toward greater stability. Yet, the process is ongoing and not yet consolidated: internationalization is a declared priority, but remains under construction, shaped by trial-and-error adjustments rather than by a definitive strategic model.

### ***3.2.2.3 Partner Selection and Market Evolution***

As already anticipated, the evolution of Salumificio di Genga’s international partnerships has been strongly shaped by participation in trade fairs. Unlike larger companies that rely on

extensive networks of agents or subsidiaries, Genga has used fairs as a strategic filter to identify partners aligned with its artisanal profile and long-term orientation.

A decisive outcome of this process was the partnership established with Sitadis in Belgium, a distributor with Italian origins. The choice of Sitadis was not incidental: its deep-rooted ties to Italian food culture and longstanding presence in the Benelux region provided both legitimacy and market knowledge, creating a fertile ground for collaboration. As Polli recalled, *“In Belgium and the Netherlands we found our first stable foreign market... the context was favourable thanks to the presence of many Italians emigrated in the 1950s and 1960s.”* Sitadis thus represents the firm’s only fully consolidated foreign partner.

Beyond this core partnership, the company has developed stable ties with wholesalers and retailers in France, targeting both the large-scale distribution sector and the mid-to-high-end restaurant segment. The Dutch market remains in a phase of consolidation, where wholesalers have shown interest but relationships have yet to mature, *“For export we are in Belgium and France and also in some situations in the Netherlands, because we have contracts with wholesalers and retailers in large-scale distribution and medium–high-end restaurants.”*

In Eastern Europe, particularly in Poland and Romania, opportunities linked to the strong consumption of smoked products suggest promising avenues, but these engagements remain limited to occasional sales: *“For Poland and Romania we only have spot sales, but it is an interesting situation for smoked products, as they are very large consumers.”*

Taken together, these dynamics highlight how fairs have functioned as a key gateway to partner selection, while the deliberate choice of Sitadis for its Italian heritage exemplifies how SMEs leverage cultural and relational proximity to anchor internationalization. The trajectory illustrates an incremental process where stable relations in Belgium and France coexist with markets still under consolidation, confirming the selective and path-dependent nature of Genga’s network evolution.

#### ***3.2.2.4 Export Oriented Innovation and Adaptation***

Innovation and adaptation have been central to Salumificio di Genga’s efforts to position itself in international markets. A first dimension concerns the firm’s systematic investment in certifications as both a technical and reputational asset. In recent years, the company has obtained IFS and BRC standards, as well as authorizations for Canada and Japan, which required on-site inspections: *“From Japan, for example, medical inspectors came to verify that what we certified in Italy was actually consistent.”* Such certifications not only enable

entry into regulated markets but also signal reliability to foreign partners, reinforcing Genga's credibility as a serious supplier.

A second dimension of innovation lies in the firm's adaptive organizational design.

At the product level, the company is preparing to broaden its range beyond traditional pork and beef, including poultry such as turkey in order to obtain halal and kosher certifications, as well as developing low-sodium products for health-conscious consumers. Such initiatives are supported by investments in advanced packaging technologies, aimed at reducing shipping times and ensuring product freshness across distant destinations.

Finally, external shocks have accelerated adaptation. During the Covid-19 pandemic, export activities were temporarily set aside as the company redirected efforts to the domestic market, achieving a doubling of turnover.

### **3.2.3 Narrative Reconstruction**

The internationalization of Salumificio di Genga can be reconstructed as a path-dependent process, emerging from the firm's repositioning after the 2008 financial crisis and progressively extending beyond the domestic market. Initial international steps were mediated by institutional channels, particularly ICE-supported fairs, which offered visibility but also exposed structural barriers, such as limited consumer willingness to pay for quality in Canada and the impact of Brexit in the UK.

A turning point came with entry into the Benelux region, where cultural proximity and diaspora networks facilitated collaboration with Sitadis, an Italian-origin distributor. This partnership provided the company with its first stable export base, which was later complemented by ties with French wholesalers and exploratory contacts in the Netherlands and Eastern Europe.

In the absence of a consortium umbrella, Genga's internationalization has advanced through experimental combinations of institutional mediation, temporary export managers, and relational proximity. Rather than pursuing rapid diversification, the firm is building its pathway incrementally, privileging selective consolidation and partner trust.

Taken together, the two case studies offer contrasting yet complementary perspectives: one highlighting the advantages of institutional embeddedness, the other illustrating the challenges of autonomous experimentation. These differences form the basis for the cross-case comparison developed in the following section.

### **3.3 Cross-case Comparison**

The final stage of the analysis consists of a cross-case comparison designed to identify convergences and divergences between the two trajectories. Following a pattern-matching logic (Yin, 2011), empirical findings from Morgante and Genga are systematically contrasted with the propositions derived from organizational and network studies. These perspectives underline that firms build competitive advantage by mobilizing different types of relational resources: bonding capital, based on strong ties of trust, cohesion, and tacit knowledge within close networks; bridging capital, built on weak ties that connect firms to new and non-redundant information across different groups; and linking capital, derived from vertical relationships with institutions that supply legitimacy, resources, and access to regulated markets (Nahapiet & Ghoshal, 1998; Adler & Kwon, 2002; Woolcock & Narayan 2000). The effectiveness of these relational resources, however, is not automatic. It depends on how well internal structures and governance models align with the complexity of the external environment (Donaldson, 2001; Burton & Obel, 2018; Luthans & Stewart, 1977). In collective arrangements such as consortia, ties are formalized and institutionalized, enabling coordinated entry strategies and reputational spillovers. In stand-alone firms, by contrast, relational capital is more personalized and rooted in family continuity or local trust, and internationalization tends to follow an incremental and adaptive logic.

#### **3.3.1 Market Access Strategy**

The theoretical expectation for consortium-affiliated firms is that market entry will be facilitated by institutional and collective actors, with visibility reinforced through PDO campaigns. Prior research highlights that network embeddedness strengthens internationalization by increasing both intensity and breadth of market engagement, while also mediating innovation and performance outcomes (Singh, Alam, & Baidya, 2022). By contrast, stand-alone SMEs are expected to rely more on direct engagement and incremental entries, consistent with stage-based approaches that describe internationalization as a gradual process of experiential learning (Chetty & Campbell-Hunt, 2003).

The observed pattern in the case of Morgante broadly supports the first proposition. As a member of the San Daniele Consortium since 1985, the firm benefited from institutional legitimacy, certification support, and collective promotional campaigns that provided visibility it could not achieve independently. At the same time, however, Morgante's strategy

was not simply delegated to the Consortium: the company actively combined institutional support with highly selective, relationship-based engagement. Market access in France and Germany was pursued through cautious partnerships with a limited number of wholesalers, while in Australia the opportunity created by a competitor's withdrawal was seized and consolidated via a trusted distributor. Thus, Morgante's case illustrates how consortium membership reduces barriers to entry and enhances credibility, but internationalization ultimately depended on the firm's own selective and relational engagement. This is consistent with the view of internationalization as an evolutionary process where firms adjust their commitment in response to changing conditions (Santangelo & Meyer, 2017). In the agri-food sector specifically, international performance is strongly tied to the effectiveness of such entry choices (Serrano, Fernández-Olmos, & Pinilla, 2018).

The case of Salumificio di Genga, by contrast, refines the second proposition. Rather than relying exclusively on informal channels, the firm's internationalization trajectory has been shaped by repeated use of formal institutional instruments. Entry into Canada, London, and the Benelux was mediated through ICE-organized fairs and B2B events, while the involvement of a Temporary Export Manager (later evolved into a Digital TEM) and, more recently, the adoption of digital scouting platforms such as MatchPlant, reveal a strong dependence on external frameworks. The outcomes of these initiatives have been mixed: Belgium and the Netherlands emerged as the first stable foreign markets thanks to Sitadis, chosen for its Italian origins and cultural proximity, whereas other experiences, such as Canada and Eastern Europe, remained sporadic and less consolidated. Genga therefore confirms the expectation that stand-alone SMEs proceed incrementally and through experimentation, but it nuances the theoretical proposition by showing that even independent firms rely heavily on formal institutional channels when internal resources are limited.

### **3.3.2 Strategic Transition towards Internationalization**

The theoretical framework suggests that consortium-embedded SMEs are expected to transition earlier toward a structured internationalization strategy, as collective reputational assets reduce uncertainty and provide shortcuts to market legitimacy (Donaldson, 2001; Burton & Obel, 2018). Independent SMEs, instead, are expected to follow a more gradual path, experimenting with markets and learning incrementally through trial and error, consistent with process models of internationalization (Chetty & Campbell-Hunt, 2003) and

organizational learning perspectives that stress stepwise capability accumulation (Schweizer, 2012; Cerrato & Depperu, 2011).

In the case of Morgante, the empirical evidence aligns closely with the first proposition. The company's long-standing affiliation with the San Daniele Consortium provided a reputational advantage and immediate brand recognition, which facilitated earlier structuring of its export activities. Morgante emphasized how introducing herself as a San Daniele producer created immediate credibility with potential partners abroad, opening doors that would otherwise remain closed. This reputational capital allowed Morgante to accelerate its transition beyond occasional exports toward more structured international engagement, particularly in markets like Australia where the firm built a consolidated distributor-led presence. However, while consortium visibility played a crucial role, Morgante also combined it with a highly selective and gradualist orientation, privileging consolidation over rapid expansion. This trajectory reflects the classic insight that internationalization evolves through experiential learning (Johanson & Vahlne, 1990), later revised to incorporate opportunities and network effects (Vahlne & Johanson, 2017).

By contrast, Genga demonstrates a more experimental and stepwise trajectory, consistent with the second proposition. The firm's transition has been marked by the incremental accumulation of technical capabilities (certifications such as IFS and BRC), organizational routines (documentation, translation, compliance), and experiential learning through fairs and exploratory contacts. Export management itself evolved iteratively: from a permanent export manager role to a Temporary Export Manager, and then to a Digital TEM. While Canada and London offered important learning experiences, it was only through successive steps—particularly the breakthrough in Belgium and the Netherlands—that Genga began to consolidate its international orientation. This gradual, adaptive trajectory reflects the constraints of operating as a stand-alone SME, where internationalization cannot rely on reputational shortcuts but must be built progressively through experimentation and learning.

### **3.3.3 Partner Selection and Network Evolution**

The theoretical propositions suggest that consortium membership strengthens SMEs' network evolution by institutionalizing bridging and linking ties, offering codified procedures, promotional infrastructures, and collective legitimacy (Rodrigues & Child, 2012; D'Angelo et al., 2020; Woolcock & Narayan, 2000). Stand-alone SMEs, in contrast, are expected to rely more on bonding ties—personal trust and localized relationships—gradually experimenting

with new contacts and consolidating only those that prove coherent with the firm's identity (Putnam, 1993; Westlund & Bolton, 2003). These distinctions reflect broader insights from social capital theory, which emphasizes that strong or bonding ties generate trust and continuity, while weak or bridging ties expand access to non-redundant networks and opportunities (Granovetter, 1973; Burt, 2000).

For Morgante, the evidence confirms the first expectation. As a consortium member, the firm benefits from collective legitimacy that facilitates access to networks otherwise difficult to penetrate. When contacting distributors abroad, Federica Morgante highlighted that presenting herself as part of the San Daniele PDO immediately generated interest, creating a reputational shortcut. However, the firm did not indiscriminately expand its network: partner selection was deliberately narrow, privileging wholesalers and distributors that valued long-term relationships and product quality over rapid turnover. In Australia, for example, Morgante relies on a single trusted distributor to manage the market, consolidating ties through loyalty and mutual support rather than diversification. Similarly, in France the company works with just five wholesalers despite potential for broader coverage, preferring a strategy that prioritizes coherence and stability over scale. These dynamics illustrate how consortium embedding provides visibility and access through bridging and linking ties, but network evolution is ultimately guided by trust, selectivity, and the family brand's symbolic capital. The case of Genga illustrates a different pattern, aligned with the second proposition. Without consortium-based reputational leverage, the company's network building has relied on fairs, institutional contacts, and direct entrepreneurial engagement. The most decisive breakthrough occurred in Belgium and the Netherlands, where partnership with Sitadis—chosen for its Italian origins and cultural proximity—enabled stable access to the Benelux market. In France, too, Genga established relationships with wholesalers serving high-end restaurants, though on a smaller scale. In contrast, Eastern Europe (Poland, Romania) remains limited to sporadic sales, reflecting weaker relational consolidation. This uneven pattern shows how stand-alone SMEs must proceed through selective experimentation, testing different partners and retaining only those that align with the firm's identity and product positioning. While Sitadis represents a consolidated anchor partnership, elsewhere Genga's network remains fragmented, underlining the experimental and path-dependent nature of partner evolution in independent SMEs.

### 3.3.4 Export-Oriented Innovation and Adaptation

The theoretical framework expects consortium-embedded firms to leverage institutional infrastructures—such as certifications, PDO protection, and collective campaigns—as primary channels of adaptation, while stand-alone SMEs are expected to rely more on incremental adjustments, often experimenting pragmatically with products, formats, and organizational routines to align with foreign market requirements (Valentinov & Iliopoulos, 2021; Schweizer, 2012).

The case of Morgante illustrates the advantages of embedding in a PDO consortium. Adaptation to export markets is strongly mediated by institutional rules: product labelling, branding, and packaging are subject to strict approval processes by the Consorzio del San Daniele, ensuring consistency and protection against Italian sounding. This institutional framework provides safeguards but also constrains flexibility, requiring every adaptation—whether private label production, QR code traceability, or boneless formats for specific countries—to comply with shared rules. At the same time, Morgante integrates incremental innovations in logistics and product presentation: relying on external logistics firms but negotiating costs directly; privileging boneless products for hygiene concerns; and obtaining FDA certification as a competitive asset in the U.S. These adaptations illustrate how consortium-embedded firms innovate within institutional boundaries, combining collective legitimacy with operational adjustments to sustain international competitiveness (Johanson & Mattsson, 1988; Forte & Oliveira, 2019).

For Genga, adaptation has followed a more experimental and resource-constrained trajectory, consistent with the expectations for stand-alone SMEs. The firm progressively acquired international certifications (IFS, BRC, Canadian and Japanese authorizations), which function as both market access requirements and reputational assets. Yet adaptation also involved trial-and-error adjustments in partner selection and communication: while fairs and ICE events provided visibility, Genga often struggled to convey the added value of its artisanal production in price-sensitive markets. Organizational routines were reconfigured to align with export demands: the export function evolved from a permanent manager to a Temporary Export Manager and then to a Digital TEM, reflecting contingent adaptations to resource limits and external funding opportunities. More recently, the company has experimented with technological tools such as MatchPlant, an AI-based platform to analyze markets, as a way to overcome informational gaps. These examples underline how innovation and adaptation in

stand-alone SMEs are iterative, opportunistic, and diversified, combining certifications, organizational flexibility, and technological exploration.

Together, these two cases highlight complementary adaptation logics: Morgante exemplifies institutionalized adaptation within a regulated collective framework, while Genga illustrates experimental adaptation driven by resource constraints and pragmatic innovation.

**Table 2 – Comparative Matrix of Theoretical Expectations and Observed Patterns across Case Studies**

<b>Indicator</b>	<b>Theoretical Expectation (Consortium-Affiliated Firm)</b>	<b>Theoretical Expectation (Independent Firm)</b>	<b>Observed Pattern Morgante Srl (San Daniele Consortium)</b>	<b>Observed Pattern Salumificio di Genga (stand-alone)</b>
<b>Market Access Strategy</b>	Entry facilitated by institutional and collective actors; visibility through PDO campaign	Entry through informal channels and ad hoc initiatives; dependence on direct engagement	Used PDO reputation and consortium legitimacy to access diverse markets (France, Germany, Australia, US). Strategy gradual, selective, focused on consolidation	Relied on ICE fairs, TEM/DTEM, banks. Stable entry via Sitadis (Benelux), consolidation in France, spot sales in Eastern Europe. Experimental and fragmented path
<b>Strategic Transition toward Internationalization</b>	Earlier transition due to reputational capital and consortium visibility	Gradual transition shaped by experimentation and self-driven learning	Transition supported by certifications, multilingual materials, selective use of TEM. Export managed internally for coherence.	Path experimental: permanent export manager → TEM → Digital TEM. COVID slowed process, now restarting with new consultant and planned export office
<b>Partner Selection &amp; Network Evolution</b>	Broad networks supported by collective	Narrower networks based on trust and	Personal identity tied to family brand; long-term trust with few	Stable partnership with Sitadis (Benelux); French

	platforms; greater bridging capital	bonding ties; slower evolution	selective wholesalers/distributors (e.g., single distributor in Australia)	wholesalers in high-end restaurants; networks remain limited, based on trust and cultural proximity
<b>Export-Oriented Innovation &amp; Adaptation</b>	Codified product standards aligned with consortium requirements; limited flexibility	Flexible adaptation based on feedback, experience, and consumer interaction	Adapted formats (boneless, private label), strict labeling under Consortium rules, FDA certification. Logistics outsourced but supervised	Obtained IFS/BRC, Canada/Japan authorizations. Pragmatic tools (TEM/DTEM, MatchPlant). Exploring halal/kosher markets; resource-constrained but flexible

*Source: Own Elaboration*

### 3.3.5 Cross-Case Similarities

A first area of convergence is the gradual and selective logic of market access. Both Morgante and Salumificio di Genga reject aggressive or indiscriminate expansion, preferring instead incremental openings in culturally proximate markets and careful experimentation in more distant contexts. This orientation mirrors stage-based perspectives of internationalization (Johanson & Vahlne, 1990), which emphasize learning and consolidation over rapid commitment. Federica Morgante recalled how the firm deliberately limited its operations in France to only five wholesalers, while Matteo Polli stressed that “abroad you need long paths to build loyalty.” These choices illustrate a common prudence, privileging quality and relational coherence over short-term growth.

A second similarity lies in the role of family governance and bonding capital. In both cases, the family name and direct involvement of owners in international negotiations act as powerful

signals of authenticity and continuity. Morgante stressed the importance of personally representing the family brand abroad, while Polli highlighted that once foreign partners recognized the seriousness and stability of the family, loyalty became long-lasting. This reliance on bonding ties aligns with theoretical work on familiness as a resource that strengthens credibility and trust in international exchanges (Zellweger et al., 2010; Arregle et al., 2021).

Both firms also employ bridging ties in a selective and pragmatic manner. Morgante used lists of distributors, targeted meetings at Anuga, and serendipitous opportunities in Australia, while Genga relied on ICE fairs in Toronto and London, eventually anchoring its presence through Sitadis in Belgium. In both cases, bridging contacts opened new channels but required long cultivation before becoming consolidated. This reflects Granovetter's (1973) insight on the strength of weak ties, while also confirming that SMEs must filter opportunities according to coherence with their identity and resources (Freeman et al., 2006).

A fourth shared element is the reliance on linking ties to navigate regulatory environments and amplify visibility. Morgante benefits from the codified infrastructures of the Prosciutto di San Daniele Consortium, while Genga compensates through certifications (IFS, BRC, Canadian and Japanese approvals), ICE support, and financial institutions such as SACE SIMEST. Despite differences in form, both firms depend on vertical relationships with institutional actors to overcome the liabilities of smallness and access highly regulated markets. This finding resonates with the literature on institutional social capital, which emphasizes the role of vertical ties in providing legitimacy and resources (Szreter & Woolcock, 2004; Forte & Oliveira, 2019). Another commonality is the incremental and adaptive nature of organizational change. Both companies invested in documentation, translations, and quality offices before scaling up, and both experimented with external expertise through Temporary Export Managers or Digital TEMs. Yet they retained core decision-making in-house, ensuring coherence with family values and direct control over strategic orientations. This pattern confirms contingency theory's view that organizational effectiveness depends on aligning internal structures with environmental complexity (Donaldson, 2001; Child & Hsieh, 2014).

Finally, the two firms demonstrate resilience in the face of shocks and environmental turbulence. Morgante adapted to logistical disruptions linked to shipping route blockages, while Genga recalibrated during the Covid-19 pandemic by temporarily retrenching to the domestic market. In both cases, internationalization was not abandoned but adjusted pragmatically, consistent with evidence that SMEs rely on adaptive strategies to withstand crises (Marcazzan, Campagnolo & Gianecchini, 2022). These experiences highlight a shared capacity to reinterpret challenges as opportunities for learning and recalibration, reinforcing the path-dependent but

resilient nature of SME internationalization. Rather than following abstract models, both Morgante and Salumificio di Genga tell stories of families navigating uncertainty with patience, trust, and pragmatism. Their similarities emerge not in spectacular breakthroughs but in the small, deliberate choices that over time build credibility abroad: a family name on a label, a handshake with a loyal distributor, a cautious investment in a certification or a trade fair. In both cases, internationalization is not just a business strategy but a process of learning to balance tradition and adaptation, rootedness and openness. What unites the two firms is the conviction that lasting growth can only be achieved through relationships that endure, values that travel with the product, and resilience in the face of obstacles.

# Chapter 4

## 4.1 Conclusion

This thesis has explored how organizational configuration—whether embedded in a formal consortium or operating independently—influences the internationalization trajectories of Italian agri-food SMEs. Through the comparative analysis of Morgante Srl, embedded in the Prosciutto di San Daniele Consortium, and Salumificio di Genga, a stand-alone family firm, the study demonstrated that governance form is not a peripheral factor but a decisive contingency shaping how firms access markets, structure their export functions, build networks, and adapt to foreign demands. The evidence indicates that the effectiveness of relational resources is not intrinsic but contingent: bonding, bridging, and linking ties generate value only when aligned with the firm’s internal architecture and with the specific institutional conditions of foreign markets.

The findings show that consortium membership provides institutional legitimacy, reputational spillovers, and collective infrastructures that accelerate internationalization and reduce uncertainty. Morgante’s trajectory illustrates how PDO affiliation can create shortcuts in partner acquisition, open markets otherwise inaccessible to a small firm, and guarantee compliance with regulatory frameworks, thereby shielding producers from reputational risks and imitation. At the same time, the case of Genga demonstrates the resilience, ingenuity, and pragmatism of independent SMEs, which—despite lacking codified institutional support—experiment with certifications, temporary export managers, digital scouting tools, and selective partnerships to gradually carve out their own space abroad. Taken together, the two cases reveal that there is no universal pathway to internationalization: strategies are always contingent and path-dependent, yet the presence of collective institutions profoundly alters the conditions of competition and the costs of entry for small firms.

Beyond the comparison of Morgante and Genga, this research highlights a broader structural challenge for the Italian agri-food system. Many SMEs located in internal and peripheral areas—including the Umbrian-Marche hinterland where Genga operates—produce artisanal goods of exceptional quality but remain excluded from institutional frameworks such as PDO consortia. These firms face global markets in isolation, shouldering alone the burdens of

certification, promotion, and partner acquisition. Their internationalization pathways thus remain fragile and fragmented, despite the intrinsic excellence of their products. This imbalance represents a missed opportunity: the absence of collective structures limits the capacity of entire territories to transform local excellence into competitive global brands, with the result that extraordinary products remain invisible or vulnerable in international markets.

The policy implications are significant. The consolidated experiences of Prosciutto di San Daniele, Parma Ham, Parmigiano Reggiano, and more recently Prosecco DOC and Mozzarella di Bufala Campana show that strong collective governance can transform localized know-how into internationally recognized icons. These success stories demonstrate that when small producers unite under institutional umbrellas, they not only protect authenticity and origin but also achieve scale economies in marketing, certification, and promotion that no single firm could sustain alone. Extending such frameworks to other artisanal productions—particularly in Italy’s internal areas—would enable small firms to pool resources, mitigate risks, and benefit from reputational spillovers.

Replicating these models, however, requires more than simple imitation. New forms of collective governance must be designed to respect the heterogeneity of local production systems while providing shared infrastructures for certification, export promotion, and market intelligence. Here, regional authorities and provinces, working in coordination with national agencies such as ICE and SIMEST, could assume a fundamental role. By tailoring flexible and inclusive frameworks adapted to the needs of peripheral SMEs, policymakers could transform scattered excellence into cohesive global presence.

Such initiatives would not only strengthen the export capacity of Italian agri-food SMEs but also generate wider socio-economic benefits. Anchoring competitiveness in cultural heritage and product authenticity could contribute to revitalizing rural areas, counteracting depopulation, sustaining local employment, and reinforcing community identity. In this perspective, SME internationalization emerges not merely as a business strategy but as a lever for territorial development and cultural continuity. By enabling isolated producers to access the same collective advantages enjoyed in established PDO districts, Italy could reinforce the international reputation of its agri-food sector while ensuring that no excellence remains confined to the margins.

## 4.2 Limitations and Future Research Directions

As with any qualitative inquiry, this thesis faces certain limitations that must be acknowledged in order to frame the scope and interpretation of its findings. The empirical focus was restricted to two Italian SMEs in the cured meat sub-sector, a choice that provided depth and contextual richness but necessarily narrows the breadth of inference. While the comparison between Morgante Srl and Salumificio di Genga offered valuable analytical leverage, it cannot fully capture the diversity of internationalization trajectories across the wider agri-food industry. Other branches of the sector—such as dairy, wine, or fresh produce—operate under distinct institutional frameworks and market logics, which may yield different patterns of network mobilization and organizational adaptation.

Moreover, although both firms fall under the EU definition of SMEs, they differ in organizational size, resource endowment, and market reach. These asymmetries may have shaped their strategic capacities and constrained the comparability of certain dimensions. While matching criteria were applied (sector, export period, family governance), such differences are inherent to real-world settings and constitute both a strength, in terms of realism, and a limitation, in terms of analytical symmetry.

Finally, the reliance on a small number of semi-structured interviews—though triangulated with complementary documentation, institutional materials, and corporate reports—raises potential concerns of informant bias and incomplete coverage. Some organizational dynamics, particularly those concerning internal deliberations or tacit routines, may not have been fully accessible. While these risks were mitigated through member checking, iterative follow-up, and the inclusion of multiple data sources, they nonetheless delimit the completeness of the empirical reconstruction.

At the same time, these limitations open several promising directions for future research. A first avenue would be to extend the comparative framework to a broader range of agri-food SMEs, both within and beyond the cured meat sector, in order to assess whether the dynamics observed here—particularly the contrast between consortium-embedded and stand-alone governance—hold across different product categories. Such research could test the transferability of the findings to contexts where PDO or PGI certifications are more (or less) institutionalized, for example in wine, olive oil, dairy, or fresh produce.

A second promising direction lies in investigating regional disparities more systematically. Many SMEs in Italy's internal areas and peripheral territories remain excluded from formalized collective frameworks, despite producing goods of high artisanal quality. Comparative research

could examine how these firms compensate through alternative forms of social capital, or how institutional interventions might help to bridge the gap. Such work would not only expand the geographical scope of inquiry but also contribute to broader policy debates about rural development, territorial branding, and regional competitiveness.

Methodological diversification also offers valuable opportunities. Future studies might combine in-depth qualitative case studies with survey-based evidence, thereby reconciling the richness of processual analysis with the representativeness of broader data. A mixed-methods approach would allow researchers to identify sector-wide regularities while still accounting for the heterogeneity of firm-level experiences. Network analysis techniques could further illuminate the structure and evolution of relational ties, complementing interview-based insights with quantitative mapping of inter-organizational linkages.

Finally, a longitudinal perspective would add an essential temporal dimension. Tracking SMEs over an extended period would allow scholars to observe how internationalization strategies evolve in response to external shocks—geopolitical tensions, regulatory shifts, or disruptions in global supply chains—as well as to internal transformations such as generational succession or managerial professionalization. In this way, future research could capture the dynamic interplay between organizational configuration, relational embeddedness, and environmental complexity that this thesis has only examined in cross-sectional form.

Taken together, these avenues suggest that the findings presented here should be understood as a starting point rather than an end point. By expanding the empirical base, diversifying the methodological toolkit, and deepening the temporal lens, future research can enrich our understanding of how Italian agri-food SMEs navigate the challenges of globalization, balancing tradition with adaptation, and autonomy with institutional support.



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# Appendices

## Appendix A – Interview Guide

### Introductory Section

- [Informal introduction and rapport building]
- Brief presentation of the study’s purpose and academic scope.
- Assurance of anonymity and confidentiality; explanation of informed consent and recording.
- General questions about the respondent’s role, background, and experience within the company.

### Block 1 – General Overview of Internationalization

1. When and how did the company’s internationalization process begin?
2. What were the first foreign markets you targeted, and why?
3. What were the main drivers behind the decision to go international (e.g., domestic market saturation, foreign demand, institutional incentives, product reputation)?
4. Have there been any major turning points or structural changes in your internationalization strategy (e.g., post-COVID shifts, new market entry, diversification of channels)?

### Block 2 – Indicator 1: Market-Entry Mode

1. Through which channels did the company first enter foreign markets (e.g., distributors, trade fairs, online platforms, importers)?
2. Did you rely on any intermediaries, public institutions, or collective actors (e.g., consortia, ICE, chambers of commerce)? If so, in what ways?
3. What were the key factors influencing your choice of market-entry mode (e.g., cost, trust, access, reputation)?

### Block 3 – Indicator 2: Time to First Export

1. How much time passed between the founding of the company and its first export operation?
2. What made the first export possible (e.g., trade fairs, personal relationships, institutional support)?
3. Were there any obstacles or delays at the beginning? How did you overcome them?

#### **Block 4 – Indicator 3: Partner Selection & Network Evolution**

1. How do you select foreign partners (e.g., importers, distributors, brokers)?
2. What role do personal or trust-based relationships play in maintaining these partnerships?
3. How has your network of partners evolved over time?
4. Is the company involved in any formal or informal networks (e.g., consortia, alliances, collaborations)? How do these affect internationalization?

#### **Block 5 – Indicator 4: Product Development & Adaptation**

1. Have your products been modified or adapted to meet the needs of foreign markets?
2. What kinds of changes have been implemented (e.g., packaging, certifications, taste preferences, product sizing)?
3. Who is responsible for making these decisions (e.g., internal team, consultants, customer feedback)?
4. Do you have R&D structures or mechanisms for gathering market feedback and adapting accordingly?

#### **Block 6 – Institutional Relationships & Public Support**

1. Has the company ever taken part in public programs or initiatives supporting export activities? If yes, which ones and with what results?
2. Do you have any relationships with institutions such as ICE, MAECI, regional governments, or trade associations?
3. How do you evaluate the quality and effectiveness of institutional support from Italy? And the challenges you face in target markets?

## **Block 7 – Strategic Governance & Organizational Fit**

1. How is export-related decision-making organized within the firm?
2. Are there dedicated figures or well-defined strategies for international markets?
3. How do you balance flexibility and structure in managing international operations?
4. In your view, is the current organizational configuration suited to the international context? Why or why not?

### **Closing Section**

- What advice would you give to a small agri-food firm aiming to approach foreign markets today?
- Is there anything I haven't asked that you believe is important to share?

## **Appendix B – Informed Consent Form for Research Participation**

### **Project Title:**

Governing Internationalization through Networks: A Comparative Study of Social Capital and Embeddedness in Italian Agri-Food SMEs

### **Researcher:**

Gynevra Polli, MA Candidate

LUISS Guido Carli & Renmin University of China – Double Degree Program in Global Management and Chinese Politics

Email: [gynevra.polli@studenti.luiss.it](mailto:gynevra.polli@studenti.luiss.it)

### **Purpose of the Study:**

This research aims to explore how different organizational and relational configurations influence the internationalization strategies of small and medium-sized enterprises (SMEs) in the Italian agri-food sector. The study is conducted in partial fulfillment of the requirements for the researcher's Master's thesis.

### **Type of Participation:**

You are invited to participate in a semi-structured interview, lasting approximately two hours. The interview will focus on your company's export strategies, network relationships, and experiences with institutions. With your permission, the interview will be audio recorded to ensure accuracy.

### **Voluntary Participation:**

Your participation is entirely voluntary. You may refuse to answer any question or withdraw from the interview at any time without penalty or explanation.

### **Confidentiality:**

All information will be kept strictly confidential. Audio recordings and transcripts will be stored in encrypted folders accessible only to the researcher. Your name and company will be anonymized in the final thesis unless you give explicit permission to be identified.

### **Use of Data:**

The data collected will be used solely for academic purposes and may be included in the researcher's thesis and related presentations. The information will not be shared with third parties or used for commercial purposes.

**Consent:**

By signing below, you confirm that you understand the nature of the study and agree to participate under the conditions described above.

**Participant Name:** \_\_\_\_\_

**Position/Company:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Researcher Signature:** \_\_\_\_\_

Appendix C – Coding Schema (NVIVO)



