

Giuseppe Celiento
PhD student
Università degli Studi di Napoli Federico II
giuseppe.celiento@libero.it

Valentina Della Corte,
Assistant Professor of Tourism Business Management
Università degli Studi di Napoli Federico II
vdellaco@unina.it

Mauro Sciarelli,
Associate Professor of Business Management
Università degli Studi di Napoli Federico II
msciarelli@unina.it

**Innovations in the distribution of tourist products:
Results of a research conducted in Italy**

1. Introduction: tourist product and its distribution process.

The distribution of tourist products is facing a considerable evolutionary process, characterized by significant and radical changes in the last decade. Next to the traditional distribution (travel agents), internet and multimedial channels have been developed in recent years: distribution in tourism industry, in fact, is defined as “multichain” nowadays.

Focusing attention on the evolution of the traditional form (travel agents), we have to take into account the role and importance of information and communication technology in the industry.

Tourist products have always been sold through travel agents. These usually were independent companies or units of multiple chains (such as Thomas Cook). Both cases show several advantages and disadvantages: more flexible, but strategically and financially weak the former, more rigid but better managed and organized the latter.

In a hypercompetitive sector like tourism industry, characterized by rapid changes in tastes, growing variety and variability in demand, global and highly information and knowledge-based competition, travel agents are facing a very difficult and complex scenario, where airline companies, tour operators and hotel chains tend to “disintermediate”, leveraging on ICT opportunities. Besides, within the tourist industry, travel agents, apart from national or international chains, have always had a very low bargaining power. For this reason, small and medium enterprises in particular are seriously menaced.

Which can be possible strategic choices in front of similar challenges, that allow to maintain flexibility and, at the same time, confer higher competitiveness? A variety of possible paths can be viewed and analysed:

- 1) networks’ creation and development: different forms have been analysed, from the more traditional and structured forms to the new and “slimmer” ones;
- 2) partnerships, especially with regard to incoming initiatives (that is promotion of cooperation in offers that promote and sell destinations).

In countries where there are several small and medium enterprises (SMEs) (especially European Countries), the concentration process is developing more than direct investments, through inter-firm cooperation processes (networking and partnerships). In the paper we analyse a sample of 15 Travel Agencies (TA) networks, in order to get to some conclusions regarding strategic implications of some institutional and managerial choices. These forms of cooperation among firms differ a lot concerning the level of partners’ autonomy from the leader and the creator of the network or of the partnership. In this paper we’ve been focusing on different variables that can specify networks and partnerships level of flexibility, in order to outline different types of configurations.

This paper is a result of a wide research project, conducted by the authors, that regards the analysis of the strategies of the different kinds of firms operating in tourism industry and of the relationships developed among them. The examined cases are Italian, even if they show some characteristics and interesting aspects in the analysis that allow to get to some interesting conclusions that, according to the authors, can be extended to inter-SMEs collaborations. *In particular, the research, that is part of a wide project in connection with Prof. Jay B. Barney, at Ohio State University, implies the application of Resource-Based Theory on TA strategic choices.*

Before analyzing the innovations in the distribution of tourist products, it is necessary to understand the meaning and contents of these kind of products.

There are different possible configurations that can be taken into account (Rispoli, Tamma, 1995), that can be synthetised as follows:

- 1) package solutions, where the different services (travel, accommodation, excursions, lunch, dinner, etc..) can be included at different levels: this is the typical situations where tour

- operators create the product, assembling the different parts according to a create process (Della Corte, 2004, ch.1);
- 2) network products, where there is some kind of planning and interaction among the different companies in the industry, allowing to client to choose among a range of possible different combination of products;
 - 3) point-to-point solutions, where the tourist creates his/her own product, by buying each service singularly.

All these configurations coexist and can be sold both through the more traditional channel (travel agencies) or by multimedial channels. However, for companies it is important to promote the first two solutions, trying to create more value for the clients. The value for the client is given by the difference between the advantages he can get by acquiring the package rather than single services and the cost of getting it (that, in case of organized offer, has to be cheaper to have success on the market).

In our opinion, it's rather simplistic to think that internet will substitute the more traditional channel. Our aim is, in fact, to examine this topic deeply, in order to get to better understand the evolutionary process that is taking place in the distribution process itself.

Moreover, in the sell of tourist products two main goals have to be taken into account and exactly: customer satisfaction and customer loyalty. The travel agent's work, in this sense, can be very important, owing to (Bigné et al, 2002):

- relationship marketing (confidence, trust, kindness and expertise of employees);
- attributes of the product (more precise information, video, etc.).

Different studies conducted in Europe, however, show how deep transformations are necessary in the traditional channel to compete in modern environment. Competitiveness, that has to follow the changes in demand, can be achieved also through continuous technical innovations: the distribution process requires not only specific competences in tourism industry but also the capacity of using new tools in new ways. Successful companies, from this point of view, are those that see also digital and multimedial tools as opportunities rather than a threat.

A recent research in Spain on the main factors of satisfaction on the services of travel agents (Millan, Esteban, 2004) shows that the most important factors are:

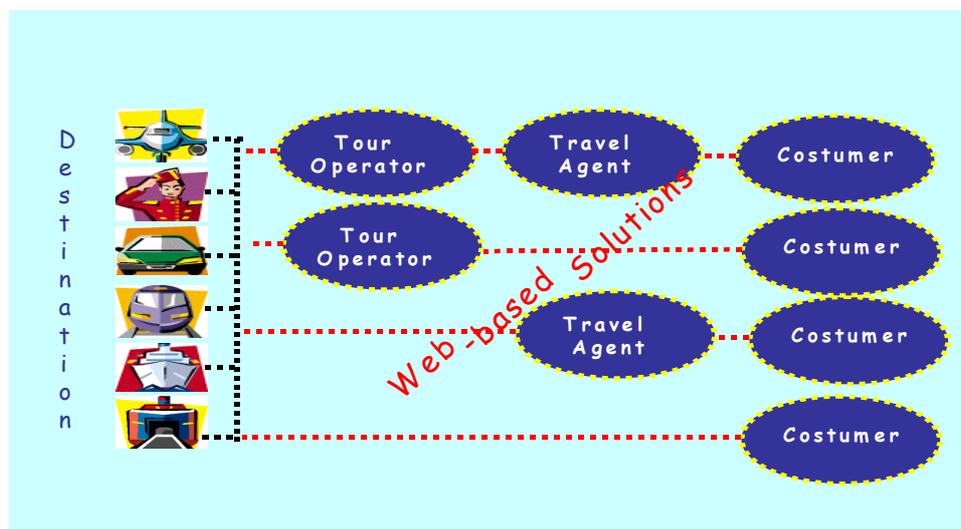
- 1) service (employment confidence, service provision continuously well, follow-up of the client, accuracy of employees, time dedicated to each client);
- 2) empathy (interest in solving problems to the client, understanding the specific needs of the client, individual attention and information);
- 3) reliability (provide the service within agreed time, comply with agreed premises, fast and flexible service, clear and sincere information).

It is rather difficult to think about the substitution of these immaterial aspects with technology. However, a severe selection process has been taking place in the last years. To respond to this situations networkings and partnerships seem to be a possible pattern.

2. The impact of new information technologies in the distribution of tourist products.

Tourism industry has been affected by a growing uncertainty due to deep and rapid changes in demand, global competition and concentration (increasing process of acquisition by large firms), widespread deregulation in several connected industries (such as the airline industry, and the impact of the newcomers on competition), as well as the critical importance of ICT solutions both in b2b and b2c relations (Buhalis, Licata, 2002). Research in strategic management describes this process as "hypercompetition" (D'Aveni, 1994; Grant, Baden Fuller 2003). Most of these factors have an impact even on the distribution channel configurations and on the strategic behaviour of firms operating within the tourism industry (figure 1).

Figure 1
The production and distribution chain in the tourism industry



It is important to underline that the tour operator is a “producer” rather than a simple “seller” of tourist products (Rispoli, Tamma, 1996). It is also the “core company” that assembles the different single services of the complex product and, at the same time, is particularly involved in the distribution process, since its activity is particularly risky.

In general, there are different distribution channels for tourist products: from the long and indirect one to the short and direct one. ICT solutions are having a deep impact on all these configurations¹, influencing backward and forward vertical integration strategies, as well as disintermediation strategies or even different kinds of networking and partnerships.

Partnerships and networking can be seen as a way to facilitate uncertainty control, developing flexibility and rapid adaptation to external changes, to support growth corporate strategies or even as defensive solution to industry competition, based on the complementarity of resource sharing among partners.

Travel agencies aggregations are sometimes a competitive reaction against the disintermediation process that is supported by new technologies. Bill Gates founded Expedia.com believing that travel agencies would have disappeared because of the development of Internet. *As we can see, travel agencies are far from disappearing, but surely they are reorganizing in a different way and, at least for the more competitive companies, new information technology often are much more an opportunity to catch than a threat.*

The scenario of tourist product distribution is complex. New firms leveraging on ICT are coming into this business, some of them as a result of a forward vertical integration strategy, some others as totally new competitors (Internet travel providers coming from ICT or communication industry). Newcomers are breaking the traditional rules of competition and have a deep impact even on the consumer behaviour. Consumer can skip the travel agent using internet to choose a destination, a tourist product, a hotel, an airline flight and to get in touch directly with suppliers.

The main reasons for the development of the different forms of cooperation among travel agencies can be found also by analysing the main promoters of the initiatives. It sometimes happen that these forms of aggregations are favoured by the tour operator itself, which creates the tourist product, and tries to build a sort of constellation system (Normann, Ramirez, 1995) around it, in order to get

¹ To analyse the impact of ICT on travel agencies according to different points of view, see Law, Leung, Wong, 2004; Buhalis, Licata, 2002; Palmer, McCole, 1999.

much more control of final demand and better plan its products' sales. This, as furtherly shown, can take place through different forms of aggregations (franchising rather than specific contractual agreements), allowing the tour operator to better govern and control distribution, reducing, at the same time, the risk of opportunism in transactions (Williamson, 1991) and reinforcing its brand and its products penetration on markets served by the aggregation.

In other cases, the aggregation process is started by travel agencies themselves (Sainaghi, 2002), in order to get more market power, both on the supply and on the demand side, in order to increase market share or develop, anyway, horizontal integration strategies. The extension and development of the aggregation therefore become strategic factors for the defense and/or growth of the entire network, compared with more direct web-based solutions that, however, are not “physically” connected to the territory.

These collaboration forms and configurations are resource and competence-based because they are primarily based on organizational competence sharing to develop products and complex systems.

They differ from direct investments formulas because they are by far more flexible and can be easily changed in the relations and in their forms. At the same time, a certain standardization of routines (Nelson, Winter, 1982) and general skills (promotional campaigns, lay-out schemes, information and control systems, communication flows) favours “repetition economies” and the development of “network economies”: the resource sharing process plays a role of multiplier of know how and learning (including error corrections in the monitoring process), for the perspectives and better development of common network strategies (Contractor, Lorange, 2002).

Moreover, for the single company that decides to be within the network, some advantages can be reached, differently very difficult to achieve by itself: from interrelation economies (Gulati, 1998), to scale and scope economies. For newcomers, it can be an easy way to overcome entry barriers and quickly acquire some knowledge competences (know how, ICT, etc.) that otherwise would require much more time to be developed by the firm itself. Risks and costs sharing in the entrepreneurial process of the network are another strategic factor for similar forms of constellations (Hennart, 1988), that can refer to both the network's inter-firm organization process and its relations with external stakeholders (from tour operators, to single suppliers, to financial institutions, local and central Governments, etc.).

In this perspective, the creation of network forms, such as franchising or profit sharing associations have, of course, also to phase several organizational and operational problems, in the resources, skills and competences generating process. ICT, in this case, rather than represent a menace, can become a useful support tool to favour more rapid and efficient information flows within the network and between this one and the external context – first of all, the market.

Therefore, web-based solutions find space both in the disintermediation process as well as among the more traditional distribution channels in the industry, favouring the collaborative and/or conflictual potential in vertical relationships, especially between tour operators and travel agencies (Pencarelli, 2003)

Barney, in his book, underlines that in strategic alliances there are both incentives to collaboration and also possible opportunistic behaviours (adverse selection, moral hazard, hold-up). On these aspects and the others above mentioned ones this paper tries to underline the main characteristics.

3. Main TA network configurations.

As underlined before, the distribution of tourist products seems to be the activity, in the value chain of tourism industry, particularly menaced by new technologies and touched by hypercompetition. However, the changes that have been taking place recently show the persistence of “multichannel” choices even in the cases of tour operators or hotel chains that have been hugely investing on ICT².

² This process is widely known as “disintermediation” (Iazzi, Rosato, 2003).

The traditional Travel Agents (TA) channel has known an important and significant evolutionary process that has deeply modified the structure of the whole distribution system in the sector (Paci, Romiti, 2003).

In particular, there is an evident concentration process due, as explained in paragraph 2, to the horizontal integration strategies when promoted directly by TAs, or to vertical integration strategies, when favoured by tour operators. This process took place at different times in Europe: it started early in Great Britain and Germany, followed by France and then Spain and Italy.

The different configurations that can be met in practice show a different level of strategic rigidity/flexibility, as well as a different coverage on the territory.

Apart from the cases of multiple chains, that usually refer to one specific company that manages all business units located in different areas of a country or more countries (if international, such as the first Thomas Cook), nowadays there are several forms of aggregations, with different features, whose study helps understanding modern dynamics.

Our research on field is based on the analysis of a sample of the main 15 TA aggregation cases existing in Italy, that show the following configurations:

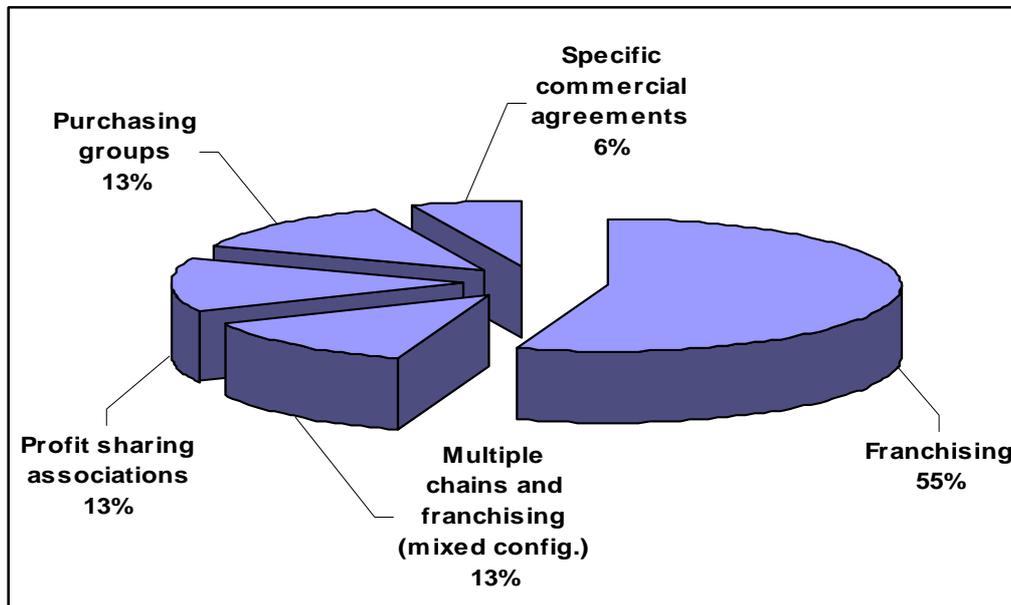
- 1) Specific commercial agreements;
- 2) Profit sharing associations;
- 3) Purchasing groups;
- 4) Franchising;
- 5) Multiple chains and franchising (mixed configurations).

The cases show the composition indicated in figure 2: the majority are examples of franchising (55%), followed by profit sharing association, mixed configurations and purchasing groups (13% of the sample each category), and a small percentage of specific commercial agreements³.

As pointed out, these can be analyzed according to the grade of flexibility/rigidity and the coverage of the territory (geographic extension index).

³ With regard to the last configuration, specific agreements have been considered with a minimal threshold number of affiliated TA and an extension in at least two regions.

Figure 2
Main aggregation forms in the sample

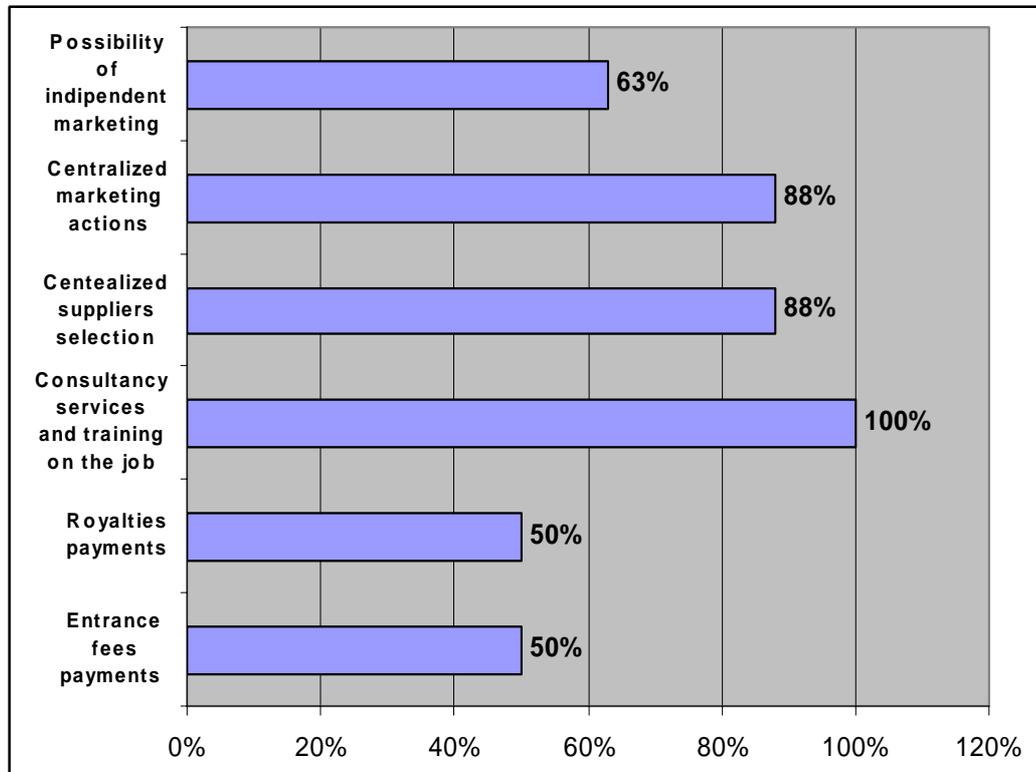


The first aspect has been measured according to different variables, that represent the main content of the affiliation processes:

- 1) entrance fees;
- 2) royalties payment;
- 3) business consulting and training on the job;
- 4) centralization of suppliers' selection process;
- 5) centralized promotional campaigns;
- 6) possibility of independent marketing actions.

In general, some variables seem to be present within the majority of the forms of aggregation, implying a higher correlation with the hypothesis of aggregation compared with individual solutions (Figure 3).

Figure 3
Main content variables in the aggregation forms examined



In figure 3 it is therefore clear, through a comparison among the different percentages, that networking is mainly connected with business consulting and training on the job, the centralization of suppliers' selection process and of promotional campaigns. Less relevant appear other variables, such as entrance fees and royalties payments, as well as independent marketing actions.

Going deep into the analysis per cluster, however, it comes out that the variables that change more significantly according to the type of aggregation form, are:

- a) the possibility of independent marketing actions (fig. 4);
- b) royalties payments (fig. 5);
- c) entrance fees payments (fig. 6).

Figure 4
Possibility of independent marketing actions

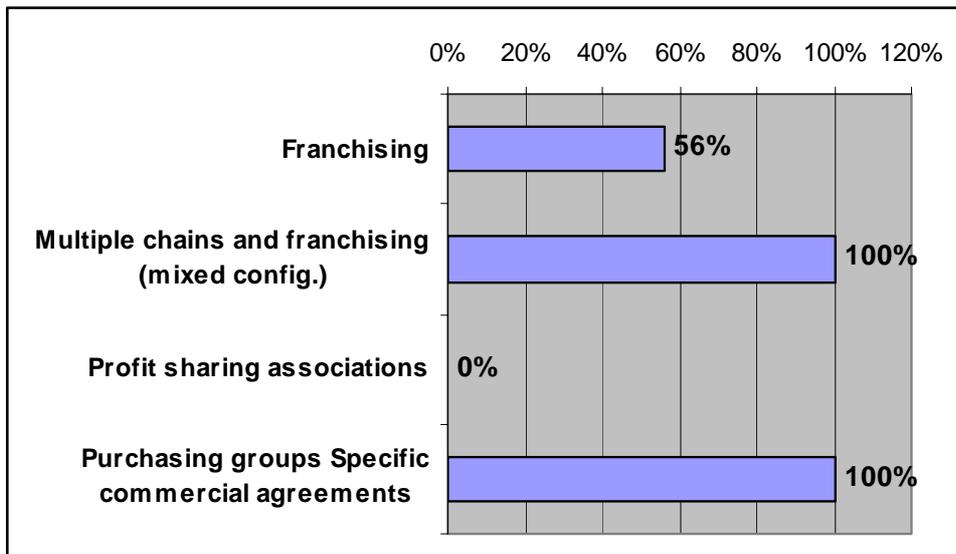


Figure 5
Royalties payments in the different aggregation forms

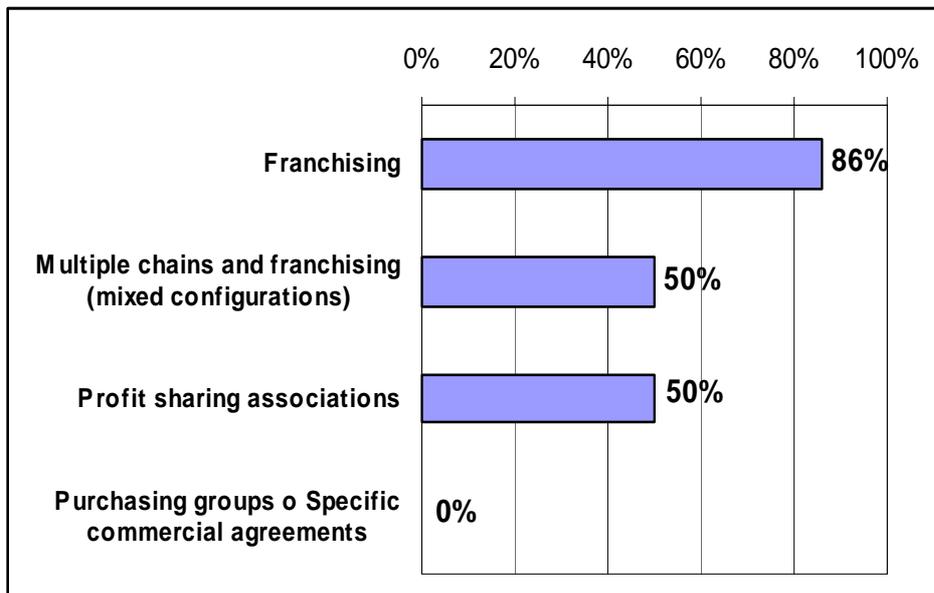
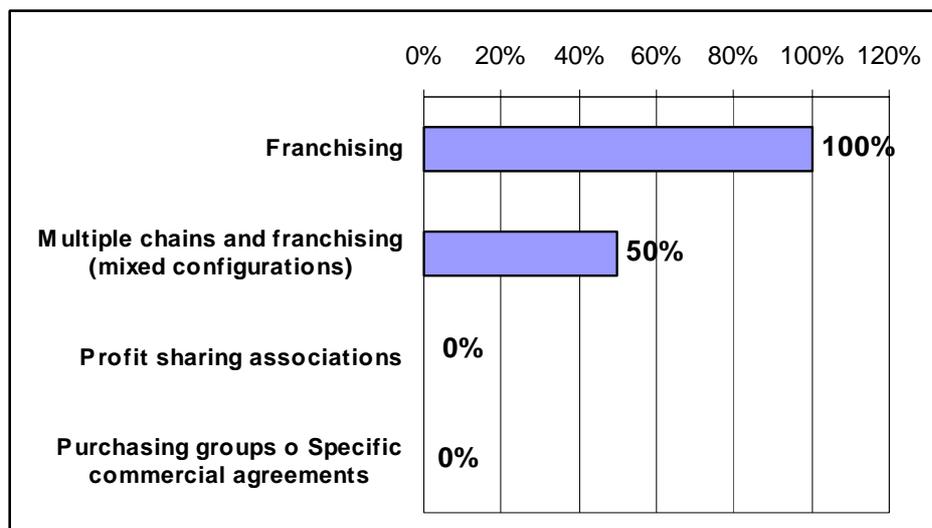


Figure 6
Entrance fees payments



In literature, an explanation for the structure of royalties and initial fees in relationship franchising has been proposed, hypothesizing that the fees and royalties are positively related to the franchisor's fraction of intangible asset and negatively related to the franchisee's fraction of intangible assets⁴ (Windspenger, 2001;).

Considering that the principal components of intangible assets of a network retailing are the brand name of the franchisor and the local market know how of the franchisee, the results of our empirical analysis (figures 5 and 6), confirm this with regard to some specific forms. They in fact show that negative relationship, because royalties and initial fees are asked from the “more structured” configurations, which prefer to associate only or mainly start up firms.

On the contrary, strategic goals of purchasing associations, that are generally brought about by already operating companies, that are well established on the territory, are mainly bound to the objective of reaching scale economies, both in supply and in the selling process.

In a multiple chain or within a franchising network the main goal, both for single participants and the network itself is intangible resources (know-how, brand image, the group commercial competences) sharing.

The analysis of each form of aggregation has conducted to the identification of two main clusters: 1) more structured aggregation forms (franchising and mixed forms - fig. 6); 2) less “structured” aggregation forms (fig. 7 and fig. 8).

Figure 7
Cluster n.1: More “structured” aggregation forms.

⁴ This relation can be found in any kind of partnerships and networkings that provide entrance fees and royalties payments.

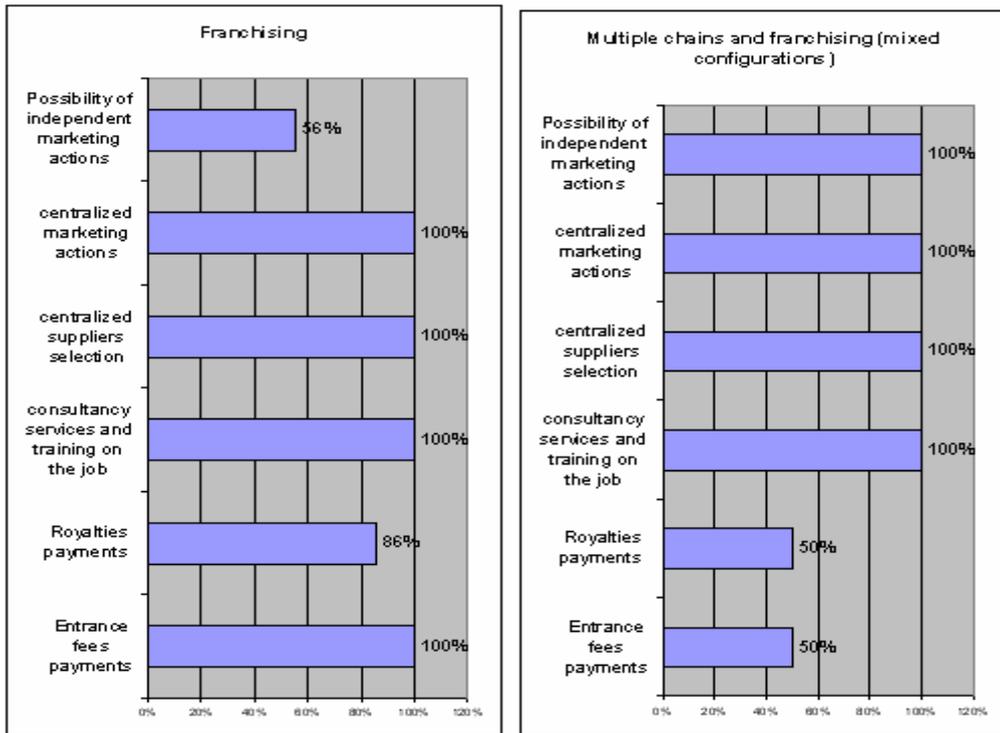
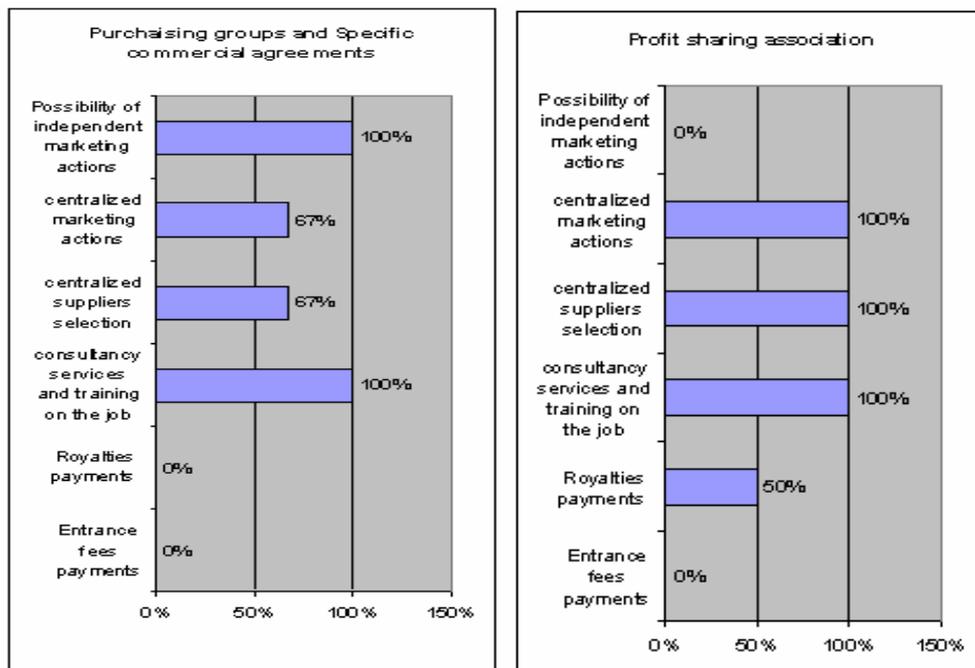


Figure 8
Cluster n.2: Less “structured” aggregation forms.



As regards the geographic distribution of the network examined, the extension in country of each of them is shown in table 1.

Table 1
Networks geographic extension index

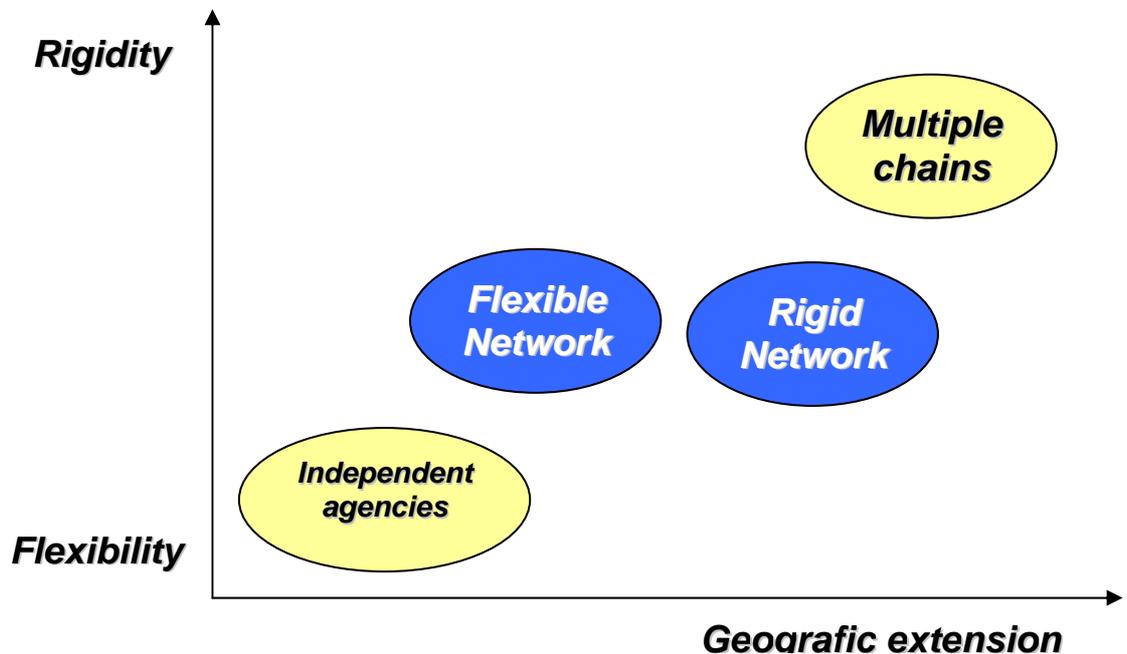
NETWORKS	N. of regions covered by the network	Network geographic extension index (% of covered regions/total n. of regions in Italy)
Open Travel Network	4	20%
Pinguino Viaggi	11	55%
Giramondo	16	80%
Welcome Travel Group	18	90%
Frigerio Viaggi	7	35%
Le marmotte	12	60%
Domina Network	16	80%
Blu Vacanze	15	75%
Cisalpina	16	80%
Elitaria	16	80%
VentaPoint	16	80%
Uniglobe Italia	15	75%
Marsupio Group	8	40%
Travel Division	7	35%
Buona Vacanza	12	60%
CIT Viaggi	11	55%

Considering the 20 Regions of Italy, the majority of networks is almost widespread all over the country, with a certain concentration in Central and Northern Italy: just four of them focus on a deeper penetration in one or two regions (these are the networks whose geographic extension index is less than 50%).

In figure 9 the different configurations are therefore positioned according to the two examined variables: the grade of rigidity/flexibility of the networks and their geographic extension in terms of regions covered.

Figure 9

Networks configurations according to the grade of flexibility/rigidity and the geographic extension



As it can be noticed, some of the configurations are in the area of the “more flexible forms”, while others in the more rigid ones. The former are the more innovative networks, while the latter are the more traditional ones. By comparing the two groups some of the above underlined differences are outlined in table 2.

Table 2
Main characteristics of the two types of network

Traditional and more rigid networks	Innovative and more flexible networks: multichannel strategies
<p>The Travel Agent:</p> <ul style="list-style-type: none"> • pays an entrance fee; • pays a royalty on annual sales; • substitutes his company’s brand with that of the network; • has a substantial change in image (good or bad); • acquires more market power in transactions; • can get overcommissions according to sales; • can get accountability and cash management centralized services; • High standardization of furniture, centralized training programs; • can benefit of privileged relations with GDS that can’t be reached as a single TA; • more structured aggregations. 	<p>For the Travel Agent:</p> <ul style="list-style-type: none"> • No entrance fee or royalty; • Sign and brand of TA together with that of the network; • acquires more market power in transactions but less than national/international chains/nets; • can get overcommissions according to sales; • can get accountability and cash management centralized services; • can benefit of privileged relations with GDS that can’t be reached as a single TA; • consulting and training programs provided; • less structured aggregations.

It is clear that the traditional forms are more structured, based on the payment of entrance fees and royalties, with a relevant role played by the network brand and much more standardization. The more flexible ones usually provide for more specific agreements, linked to a particular tour operator or just to get higher transaction power with suppliers. The more structured configurations (that are more homogeneous in image, brand, furniture, colours, etc.), while the second tend to keep the specific know-how of existing companies and their position on local markets. In fact, while the first group tends to acquire business start-ups and is more appropriate for these cases, the other is proper of already known and developed travel agents. Besides, while the former are more widespread on national territory and, as said, more standardized, the latter show a deeper penetration on local markets.

4. Strategic choices for TAs according to Resource-based Theory.

The analysis conducted on the cases’ sample has allowed to examine important strategic and organizational aspects, in order to understand the main differences, in managing the network, according to the Resource-based Theory (Dierickx I., Cool K., 1989; Barney J., 1991; Mahoney J.T., Panadian J.R., 1992; Peteraf M.A., 1993; Jensen O., Wernefelt B., 1984; Aker D.A., 1989; Grant R.M., 1991; Hall, 1992; Amit R., Schoemaker P.J.H., 1993; Collis D.J., Montgomery C.A., 1995; Penrose E., 1959).

In particular, the aim is of analysing the roots of network competitiveness. In order to understand this, it is necessary, however, to take into account the specificity of the configurations found in the analysis.

The more structured forms, as underlined before, are based on a higher standardization of processes, services and images. On the other hand, the less structured ones tend to emphasize members’ autonomy in the choice of furniture, shop signs, brands and service standards.

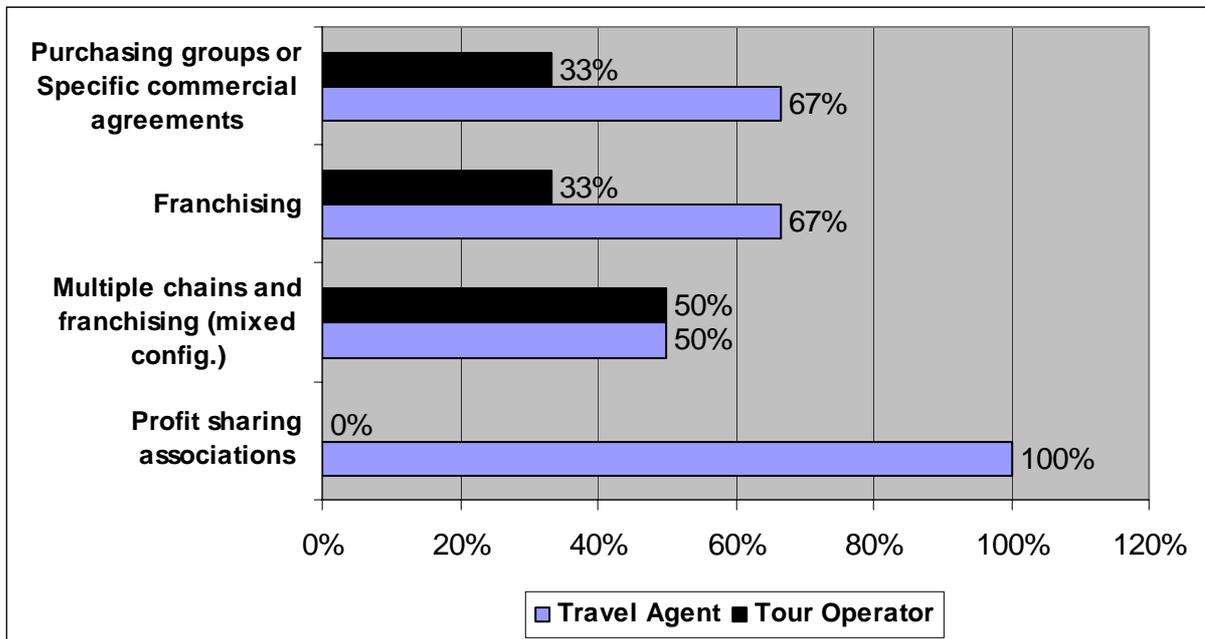
Connected to this aspect, there is the fact that while in the cases of franchising, mixed forms and profit sharing associations there is a greater interest towards business start-ups, in order to transfer the typical know how of the group, in the other two configurations members are usually well known TA, with some expertise, already known on the territory. Therefore, in the first group it is mainly used the network brand⁵, that prevails in front of the single TA one, while for members of the second group it's just the opposite (prevailing of single brand)⁶.

To understand the roots of these differences, it is important to take into account also the process of network set up. As shown in figure 10, the majority of them are established by travel agents; others are promoted by tour operators. The aims, in the two cases, are of course different. Those that are promoted by TA are set up with the main intent of empowering the bargaining power to suppliers, assuring them a widespread diffusion of the products sold on the market and of developing commercial initiatives otherwise unaffordable for a single TA. On the other hand, networks provided by tour operators are linked with the objective of improving the TO's sales in area of locations of affiliated members.

⁵ Just in franchising, the 56% of companies uses both brands, while the 44% both brands.

⁶ Precisely, the 67% uses mainly its brand and the 33% both.

Figure 10
Relationship between the type of promoter and the forms of collaboration



It's interesting to notice, in fact, that the 91% of the networks promoted by TA aim at getting privileged relationships with several suppliers (TO, hotel and airline companies, etc.), while the 80% of those promoted by one specific TO mainly focus on the offers of that operator and are precisely created to favour the penetration on the market in different regions/area.

The more critical factors noticed in the analysis, regarding these typologies of interfirm collaborations, are:

- 1) the existence of win-win conditions, which implies advantages for all members that decide to affiliate, that show an adequate level of homogeneity (in terms of sizes of the firm, market power, etc.). This is quite easy to get in European contexts, where there are many small and medium enterprises and the range of strategic and marketing action of the network by far exceeds that of each single affiliated TA;
- 2) clear objectives in projects and initiatives brought about by the network;
- 3) among the main aspects, trust among partners, which also means absence of negative widespread diseconomies or asymmetric information: parts have to be trustworthy and the cooperation has to be trustful;
- 4) cultural and organizational compatibility, which does not necessarily mean homogeneity but capacity of communication among partners, flows of information and knowledge sharing, in order to get to a common language and improve it;
- 5) connected with the previous one, partners' attitudes towards sharing and/or integrating resources;
- 6) managerial fiat, which refers to the network management system and the specific competences of the board/corporation that leads the network. This factor refers to skills and competences of the network itself and in particular of the company or board that manages the whole system. At this level skills connected with coordination, strategic analysis and

strategy formulations, insight in selecting affiliation demands and organizational matters are extremely critical;

- 7) efficient and effective techniques and methodologies, that is organizational instruments, methodologies and decision support systems, all important for converting potential resources into effective strategic factors.

Therefore, the most proactive networks show higher skills and competences in:

- a) network coordination;
- b) networking specific competences;
- c) skills in targeting management, both at the network and at the single TA levels. As regards the networks, it refers to the skills in selling products and dealing with more and more sophisticated and demanding clients (personal consulting);
- d) capabilities not only in front office activities, but also in back-office management, in order to get more efficiency also through information and communication technology (ICT);
- e) specific competences in managing relationships with suppliers.

All these aspects examined bring to important implications, since the two main configurations show a very different approach in acquiring and managing strategic resources, that is resources that can take to sustained competitive advantage. While the more structured ones are, as already underlined, more appropriate for business start-ups, creating and improving new and specific capabilities, in the second single travel agents' competences and skills are considered a strength for the whole network and even better emphasized.

The two models are not really alternative, but rather complementary, since they refer to different typologies of TA and at different phases of their lifecycle.

It is then important to get to some conclusions, also taking into account some further research developments:

- are more important capabilities as specialists or generalists in the distribution process?
- which can be further development paths for inter-firm networks among small and medium enterprises?
- is there a future for single TA?

In the worldwide web hypercompetition, TA are in front of a serious challenge: finding new strategic paths or liquidating. Networking and partnerships' processes are one of the paths that seem to prevail with good performance results in several cases. The mix and typologies of these resources and capabilities varies according to the type of configuration: in some cases certain kinds of resources prevail, while in others different skills and competences are required and developed. However, in order to gain sustained competitive advantage, or at least to be competitive, they do have to invest significantly on these resources and competences: differently, they are a destined to be a bubble!.

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