

Distretti italiani

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Policies for “Italian-style” districts

Many foreign delegations visit us on study tours with the aim of discovering the keys to the success of Italian industry and local systems of small companies. One of the most difficult things to explain to these visitors is that there has not been, and still isn't, a real policy for industrial districts.

From a didactic viewpoint, this statement is exactly what our guests wish to learn, for they have in mind programmes, measures and financial support that in our case have never existed. The explanation is substantially correct even if it does tell the whole truth.

It is true that there is no systematic policy for districts but that does not mean that those involved in local systems have not made use of the few means they have at their disposal to support their development. Some Regions finance Service Centres and consortia, local administrations provide the infrastructure to industrial areas, and businessmen's associations and Chambers of Commerce handle professional training, collective services (trade fairs, transportation etc.), and the public image of the territory. Countering the lack of top-down political rules for industrial districts, there are very many examples of bottom-up political actions.

The complicated regulations introduced in 1991 with the framework norm on industrial districts slowed this original process, in which all the vitality of the districts and their desire to work on their own development is reflected. Instead of reviving the experiences of local policies, article 36 of law 317 brought all attention to bear on the problem of formal recognition of the districts, resulting in complex algorithms used to draw up maps and redraft inventories that promptly raised argument.

Despite the absence of a systematic framework for actions to benefit districts, the districts themselves have not ceased to reflect on their problems and have equipped themselves in many different ways to cut off the demand for focused support expressed by their member companies. A quick trawl through the sites of the various local industrial systems in Italy will quickly show up a surprising assortment of schemes: events of all kinds, projects for technological innovation or the diffusion of computer applications, investments in infrastructure (industrial areas), consortia created for purposes of promotion or purification of the water, consortia of district companies for the purchase of energy, development agencies, training courses, area-based trademarks, research into needs, Internet portals, publications, and exhibitions and museums of local products.

These schemes vary in their objectives, size, innovative contents and cultural depth; the impression they give is of a huge and chaotic set of investments in which subjectivity is often at a premium on their effective capacity to act. Even taking into account that a great proportion of this set of schemes does not produce the desired results, they are nonetheless an important and *typically Italian* phenomenon. With few resources to hand, but using a great deal of imagination and courage, they have tried in many ways to make local development a political issue. The time is ripe for close analysis and appreciation of this wealth of partial experiences, and this could well be the right approach for regional governments and development agencies to revive the issue of policies for industrial districts.

Museums and boots

The traditional role of museums being a store for works of art has recently moved on and there are now increasingly many institutes dedicated to the custody of objects of historical interest. The phenomenon is rapidly spreading and there are many museums that exhibit local products in industrial districts, for example, museums of fabrics, household products, silk, industrial archaeology, clothing, fashion publications, shoes, glass and the working of slate.

The flourishing of institutions where individual companies, associations, Chambers of Commerce and local bodies invest resources in the renovation of buildings, the cataloguing of samples, prototypes and posters, or in the renovation of old machinery for educational purposes, offers an excellent reflection of the enthusiasm felt for old trades and for all of the contextual knowledge that existed before new technologies made it redundant. The way in which these museums of local industry interpret their role goes beyond simple conservation of the past. The rediscovery of the manufacturing roots of centres such as Biella, Carrara, Carpi, Como, Fontanabuona (slate), Prato, Verbania and many others is intertwined with cultural activities and other schemes based in the present.

A perfect example, from this point of view, is the Boot Museum in Montebelluna. In addition to the task of collecting products, documents and pictures linked to the history of local industry, the Museum offers a series of functions that includes stimulating the local economy, training, and the distribution of services aimed at providing a representation of the district institutions.

Each year (this year is the 17th), the Museum produces a report of the business climate (the data are provided by roughly 450 companies) and the situation of the companies, offering data based on production, employment, strong and weak points, weaknesses in the infrastructure, and publications and events that have characterised the previous twelve months in the district. In essence, the report provides an inside view of the district and the transformations that are taking place.

The *Osem 2000 Report*, as it is called, shows a favourable economic situation with a battery of indicators showing a “+” sign. The number of companies working in the footwear business and auxiliary activities has fallen (-8.3%) but employment has increased (+3.5%). Production too has increased (+11.6%) and turnover (+22.1%).

In the section that gives an overview of the district, with data on the number of shoemakers, their distribution throughout the 16 communes in the district, and the production of a wide range of sports shoes (for dance, football, cycling, skiing, after-ski, jogging, hiking, skating, tennis etc.), the authors of the report discuss many of the most important aspects of local development.

The passages that deal with the phenomenon of delocalisation – a constituent part of the local economy – are very current and not only for the district in question. 24% of the shoes in the collections of the companies in Montebelluna (and therefore marketed and, presumably, designed locally) is produced abroad. For those lines produced, in part, on this side of the border, and to a small extent, beyond it, (“*a very difficult picture to paint*” is the suitable title of one paragraph), 46% of the cutting and hemming phase, 21% of assembly and 6% of moulding is delocalised.

The incentive for businessmen to get on a plane for Timisoara and other cities following the invasion of manufacturers in the north-east of Italy is the much lower labour cost, but, as the authors also point out, negative factors are the lower safety standards and the presence of other businesses from Veneto (or

elsewhere in Italy). The report does not make judgements on the strategies taken by the companies but limits itself to describing a phenomenon that, as is known, has rapidly established itself. The few paragraphs dedicated to describing what is happening are enough, however, to get a general understanding of how the phenomenon is viewed locally. There does not appear to be the collective anxiety that is often present in the background of discussions of the evils of delocalisation for the districts. The report also throws up another thought: by themselves, small companies must overcome high obstacles to implement strategies of internationalisation effectively; when operating in groups – of various size and fundamentally informal in nature, like all districts are – the problem of delocalisation appears less difficult.

Veneto banca

Asolo and Montebelluna, world centre of sports footwear. OSEM 2000 Report.
Museo dello Scarpone; Montebelluna, 2001

The fashion and consumption observatory

The International Observatory of Fashion and Consumption for Sportsystem was officially opened on 5 October 2000. It is a precompetitive service for the benefit of companies operating in the sports footwear and dothing district of Montebelluna. In essence, it attempts to help the companies follow and, if possible, to anticipate changes in the market.

The Observatory is an offshoot of the *Territorial Marketing Project* promoted by the Treviso Chamber of Commerce with the collaboration of trade associations and other bodies operating in the district. The Fondazione Museo dello Scarpone – which for years has acted as a reference point for those operating in the district – oversees the project, ensuring the interaction of external experts and local companies.

The service covers three areas: the functional use of sports footwear, analysis of demand, and fashion and materials' trends.

Various meetings have been organised with individual experts in the sector, such as Francesco Morace, Progetto Europa, Tecnologia&Design, Servizio Moda Acrib and Enrico Finzi. The balance of this first cycle of meetings has been positive overall. Target operators (designers, stylists, technicians, pattern-makers, and marketing and communications people) have judged the services offered by the Observatory interesting though incomplete. There has not been enough attention paid to the specific nature of the district's activities, with its special products and original industrial culture.

The programme for 2001 decided to make a leap in quality. There will be further meetings of a general nature based on scenarios described figuratively by the experts but focusing on the activities of a special Style Group coordinated by the Museo dello Scarpone. This was the starting point for the programme: Montebelluna is the district leader in the sportsystem and, in particular, in sports and technical footwear. Instead of delegating interpretation of the trends in materials and colours to outside experts, it was decided to draw on local experience and knowledge of markets and commerce, thereby avoiding the typically "provincial" mistake of researching outside at all costs and not exploiting what is abundantly available on the doorstep.

The Observatory has set up a round table of stylists, designers and other creative personnel who will meet regularly to give their impressions and to create a joint forecast of market demand for products, colours and materials. The Style Group, which officially began operating in April, currently includes fifteen or so members of local companies and design studios. The meetings will culminate with the putting together of a report on trends, colours and materials for summer 2003.

This first report will be presented at the end of September but a preview of the colours will be made available to a number of suppliers who will prepare prototypes with colours "selected by Montebelluna Sportsystem" and colour charts labelled "Fashion Observatory" will be distributed by the Museo dello Scarpone in trade fairs around the world.

This will mark an important step forward for Montebelluna and all industrial districts: for the first time, rather than following the colour trends proposed and imposed by trend-setters in the worlds of fashion and foreign institutes such as Promostyl and Tinstyle, the companies of Montebelluna will present their

proposals as a group. In tackling this step, which is for the most part cultural, the Style Group is already thinking of looking to business sectors outside of fashion such as household appliances, cars and graphics. And the future may hold prospects of working with other Italian industrial districts which already have, or are intending to create, their own trend observatories.

Valentina Durante

District “brands”

At the end of June, the Club organised an internal seminar to discuss recurrent themes in the policies of local development. One item discussed in particular was district “brands”, a device considered by many industrial districts in various ways and at different times.

Underlying everything, there is a fairly apparent phenomenon: the image of a district (as a recognised deposit of specific know-how in a particular business sector) is fundamentally a “public asset”, i.e. that offers a competitive edge that all companies in the district can take advantage of, regardless of their participation in joint programmes that support the local image. However, when used in this manner, the overall investments made by the district companies to promote the brand are inevitably less than ideal.

And here we find the first paradox: most of the companies – when considered individually – are not able to use this communications tool effectively because of their small size. Businessmen are agreed on the usefulness and importance of investing in the district image but there are no prescriptions to exclude the companies who do not share the costs of promotion from the benefits to be obtained.

This hitch can be overcome by resorting to brands reserved to restricted groups of companies (for example, consortia of food products). In this way, the balance between investments and benefits can be ensured, but, in industrial districts, unlike the food industry, disciplinary problems have ensued, associated with the concession of the brand-name. Even if some of the attempts to promote district brands have not made their mark, the desire to do so remains unchanged, and this was the subject of the seminar in the Club.

Three years ago, the Chamber of Commerce in Belluno launched a project to create a brand for its producers of eye-glasses. After a careful survey of the district, a set of technical regulations was drawn up and several specialists worked on the positioning strategies and the steps to take to promote the brand. An advertising agency created a logo – “GLAD” (an acronym of Glasses Dolomiti) – to denote a sense of pleasure and, using graphical effects, the letter A was designed to represent a Dolomite mountain.

The brand-name was registered and the small and medium-sized companies of the glasses district were able to use the symbol, either individually or as a group, in accordance with the prescriptions laid down. Currently, efforts are being made to encourage companies to join the consortium, following which, promotional work will begin.

This example is interesting because it is based on the challenge of persuading the general public and the glasses trade (in particular, shopkeepers) that the new brand is worthy of being placed alongside those of the industry leaders which, as is known, are also located in the district of Belluno.

A similar project is about to start in the silk district of Como. In this case, the regulating document of the “Silk co” brand plans to incorporate UNI certification but the trademark itself will only be available for use if most of the manufacturing of the silk is done in Italy and if certain regulations are respected. An ad hoc organisation, with a group of inspectors, will be responsible for making regular checks on the companies. The first two phases of the brand-name plan for the district of Como will require investments of 3 million euros.

The decision taken by the district of Biella is of the other type, i.e. a joint brand-name for the territory. This approach was deliberately chosen by the district Committee to strengthen the territory of Biella in all aspects. The trademark will

therefore not be used on products but to improve the image of Biella in communications at institutional level and at public or trade events (fairs, exhibitions etc.). The slogan "Biella, produces" was the winner of a special competition and will be used in leaflets, publications, audio-visual and other promotional means.

Other examples of territorial brands are "Prato Moda Operandi", promoted by the Unione Industriale Pratese, and "InGenius", used by the clothing and leather goods districts of Val D'Elsa near Florence. The latter brand was discussed in issue no. 7 of Italian Districts.

The “districtualisation” of Italy

For a long time the word “district” has been used to refer to the territorial systems circumscribed and characterised by the dominating presence of “industrial” activities organised in networks of small and medium-sized companies.

Gradually, it became more widely recognised that the competitive advantages derived from territorial links, inter-dependence, professional markets and the combination of the “identity” and “visibility” generated by the localisation of so many businesses in one area were not restricted only to manufacturing companies.

The first divergence from the word “district” from the acceptance it initially had was extended to food and wine areas; it was not difficult for Davide Paolini and other gastronomists to create a consensus among other admirers of the bacon fat from Colonnata, onions from Tropea, bread from Altamura, the patisseries in Ragusa, the truffles from Langhe and hams from the hills around Siena.

Once the first exception had been made, the rest was easy. Before long there were cultural districts: “*The urban areas that specialise in this and which contain the highest concentration of activities and places for art and show-business are known as cultural districts*” as a report by the Associazione Civita underlined last June. The report mentioned that the term was used by London City Council in the 1970’s; in some documents the concepts of urban marketing, specialised agencies and other integrated means were discussed which, later, were used (more outside Italy than inside) to revitalise areas in decline and to develop activities able to increase income and employment in certain areas. The Associazione Civita described many text-book cases, like the project to create a cultural district in the centre of Boston where the adoption of the reclamation plan was preceded by an evaluation (in which the local community was involved) of the economic impact of the plan. Even if it needn’t become a vogue, it is probable that this type of attention paid to systemic elements linked to the territory will soon be imported to Italy.

This model was the basis for the report on tourist villages discussed by Giuseppe De Rita some weeks ago. The report was written by ACI and Censis based on a census of 299 tourist districts (96 on the coast, 37 artistic and cultural, 137 in the mountains and 29 integrated) in which 22.4 million Italians live overall, and which number 16,600 restaurants and 24,300 hotels.

Although there may be overlaps, to understand the extension of the district phenomenon, many of the 199 “industrial districts” defined by Istat in 1996 must be added. This second group of districts is home to roughly 14 million Italians. In practice, therefore, more than two thirds of the citizens of Italy live (or are considered to live) in industrial, cultural or tourist villages and this may be an underestimation.

In any case, after examining the tourist villages, the Censis researchers grouped them on the basis of their *recreational activities* (sport, shopping, entertainment etc.), *hospitality* (hotels, campsites etc.), and *refreshments* (the quality of their food and wine offerings). This was an exercise that many will criticise but the areas of Italy studied (the Riviera, Versilia, Costiera, valleys and surrounding areas, large centres and networks of small centres) is fairly persuasive and it is not difficult to recognise the same competitive rivalry between them as is seen between the most famous and celebrated industrial districts.

Shortly before, the phenomenon of tourist districts had been analysed in the annual Istat report: “*the entire territory from Bellaria and Igea Marina to*

Cattolica is a complex of more than 5000 businesses, organised both in networks and uninterruptedly, that offer the tourist a customised series of products, created by the district to suit the requirements of individual demand. During the high season, the district of Rimini employs 40,000 staff (25,000 more than during the low season!) with a clear prevalence of female employees (65%); another comment by the report was, *“the beach is the most important resource”*.

This process of “districtualisation” has affected nearly all of Italy but has not yet ended. The Region of Tuscany, for example, is preparing to institute “rural districts” – a new category and certainly not the last – typified by Chianti. Lombardy has invented “meta districts”, a new definition that will allow, perhaps, the inclusion of the set of services dedicated to the fashion industry (e.g. trade magazines, PR agencies and showrooms) which have Milan as their base. The first district map drawn up by the experts of the Veneto covered virtually 80% of the region. Among the new entries across Italy in this rather loosely defined inventory, there are the Etna Valley, the cluster of multimedia services in Rome and the highly developed electronics area near Genoa.

Industrial districts, in their many-faceted manifestations, have practically conquered Italy. Leaving aside the comments, what is effectively emerging is the role of their business context as a pillar of the development of Italy, both in the central north and the south. The extension of the meaning and use of the word “district” to include tourism and the food and wine industry should not, however, make us lose sight of the complex of perspectives of the Italian industrial system that has, in its districts (with all their weak and strong points), one of its most important planks.

Bibliography

P. Valentino
- I distretti culturali
Associazione Civita, Rome 2001

Aci Censis
- Distretti turistici: l'opportunità di innovare l'offerta
Rome 2001

Istat
- La situazione del Paese nel 2000
Rome 2001

D. Paolini
- I luoghi del gusto. Cibo e territorio come risorse di marketing
Badini & Castoldi, 2001

Good government of districts

The unending subject of industrial policies for Italian districts has been further enriched by a new contribution made in almost “minimalist” style. A 70 page report that compares the theories of districts with the peculiarities of the development along the Adriatic coast and presents the results of a study on the subject. All this to prepare a methodology for an investigation into “*good district government*”.

Although dozens of articles have been written and hundreds of pages filled in the official bulletins of the Regions of Italy, the subject of district policies has hardly got underway and contributions like the one by Balloni, Cucculelli and Jacopini – halfway between academic analyses and the desire to claim a stake on the field – are original and timely.

Research has come up with a new (the umpteenth) methodology for identification of territorial systems on which new industrial policies can be based. Analysis of clusters is used to map eleven gravitational “basins” or integrated system areas; slightly altering a phrase used by the authors, it is true that the “*imagination of economists is not as poor as might be thought!*”

Two ad hoc surveys were carried out on three of the “system areas” identified. The first survey was based on a sample of companies to understand the strong and weak points of localised factors in the system area and relationships with the local community. The second examined a group of workers whose answers provided elements used to analyse the quality of the social services at work and at home.

The results of the surveys confirm the centrality of the complex alchemical natures of industrial districts; in addition, there were many interesting elements in the methodology used that aimed at encouraging the members of the economic system to listen to one another.

The general and methodological proposals considered in the report are obviously not set outposts on the approach to a definitive solution. Unlike what the authors seem to think, there is no best way regarding policies for industrial districts. The report harbours a poorly hidden distrust in district committees, “*naïve, meeting-ridden, plethoric, excessively ponderous and difficult to manage*”. In response to “*spontaneous collaboration*”, the report counters excessively strongly with “*voluntary collaboration based on programmed collaboration*”. From this point of view, the experiences of district committees are not univocal, just as, a priori, there are no reasons to believe that “*forums of system areas*” might be more effective (which the institution proposes so that an approach to local policies may be defined), and to an even lesser degree is there reason to have faith in the assistance of the regional development agencies.

The problem of the new industrial area policies is not so much one of institutional architecture or means, the greatest tangle is the way in which local entities (the economic ones in particular) equip themselves to use them. To make headway on the subject of the strengthening of districts, which up till now has been completely static, we need fresh and direct contributions like the one from Balloni and colleagues.

V. Balloni, M. Cucculelli, A. Jacopini

La politica industriale per distretto

Confindustria Marche, Ancona, 2000

The districts of Basilicata

The Districts Club is a cultural association which, as such, comes up against dozens of problems when trying to deal with requests for collaboration and assistance on the subject of district policies. This was the spur in the decision to form a company, District Lab, of which the Club owns 90% and club members the rest. In practice, the company forms the operating arm of an association that is a very simple, and substantially non-profit, organisation dedicated to the problems and policies of industrial districts.

Last January, the Region of Basilicata created a set of regulations governing action on behalf of industrial districts and local production systems (Regional Law no.1 of 23/1/2001). After deep analysis by a group of experts led by Prof. Fabio Sforzi, the Regional Council defined a list of areas that were eligible for support for local development (Regional Council Decree no. 1433 of 25/6/01). This formally opened the procedures for the institution of District Committees. The districts in the list were sofa producers in Matera, corset makers (clothing) in Lavello-Melfi, mineral water producers in Rionero in Vulture and Bella, and light industry in Pescopagano and Sant'Angelo Le Fratte.

The Region of Basilicata decided to give District Lab the task of providing support during the definition of actions for the districts and initial assistance to the newly formed district committees. District Lab will therefore make available all the experience accumulated by the members of the Districts Club. The requested services will be provided partly indirectly (at a general level) and partly through the presence of experts at the early meetings of the district committees.

With a touch of nostalgia

This is an item of news that will not please those who enjoy handling printed paper and opening their correspondence with a letter opener. To them we offer our sympathy for the following decision, taken not without a certain degree of regret.

Districts, as we all know, are the custodians of traditional crafts and have played this role not simply for purposes of self-defence or conservation: innovation and tradition have been brilliantly merged in the histories of all Italian districts. We too have taken the decision not to allow ourselves to be blocked by passively defending things as they have always been, but to follow new directions that allow us to communicate with readers in a different way.

As from January 2002, *Distretti Italiani* will also be distributed electronically. For a while both the paper and digital versions will be available but, at a certain stage, only the electronic format will be retained. Readers who wish to keep in direct touch with industrial districts and the Club are **requested to give, on the coupon over the page, the email address** at which they would like to receive future copies of *Distretti Italiani*.

**Cut out, photocopy, fill in and send
via fax to the number 0574 455288**

Name:

Surname:

Company / organisation:

(only for those to whom it applies) District

Telephone:

Email address:

I authorise the District Club to use the information provided (name, surname, address) exclusively for dispatching of *Distretti Italiani*.

Signature

Date

Illustrations

The illustrations in this issue of *Distretti Italiani* are taken from *Le carte della carta* by D. Ferrari, published by Libri Scheiwiller, Milan 1999.

How to join the Club

The following are eligible to join the Districts Club: Italian industrial districts represented by Chambers of Commerce, industrial and crafts associations, service centres, trade unions, and local development organisations comprising the above or local authorities.

Information is available from **Club dei Distretti Industriali, via Mazzini, 92, 25065 Lumezzane – Brescia; telephone +39 030 825 1011, fax +39 030 892 1420, email: distretti@lumetel.it**

New members soci

The *electronics district in Genoa* (200 companies, 7500 employees, 2000 billion lire (1 billion euros) production value of which 25% is exported. The district is represented by the association **DIXET**, “Distretto Elettronica e Tecnologie avanzate”.

Networked districts

i. Information on the activities of the Districts Club is available on the Internet site www.clubdistretti.it where, among things, back numbers of *Distretti italiani* can be consulted.

- Local administrations, business associations and anyone involved in the planning of territorial development and local communities can meet, on-line, at the address www.re-set.it. Re-SET is a place where models and methodologies can be compared and is a tool for increasing the skills and professionalism of those involved with local development.

- **LEEDonLINE** is the new on-line publication of the Leed programme (*Local Economic and Employment Development*) launched by the OECD. Leed is an international network of authorities and organisations involved in local politics and deals with employment, business, innovation, international co-operation and the diffusion of best practices. This new publication can be seen at www1.oecd.org/tds/LEEDonLINE/1.htm, or by writing to dina.ionescu@oecd.org

The voice of the Club

The Club was present at the following meetings:

- Censis
X Forum of local economies.
Rome, 18 April 2001
- Associazione Industriali Viterbo
Civita Castellana, industrial district.
Magliano Sabina, 20 April 2001
- Bioindustry Park Canavese

Technological development and local development. Comparison of experiences.
Colleretto Giacosa (Turin), 29 June 2001

- Envirdis
Virtual districts: a European network for innovation.
Naples, 18 June 2001
- Informest, Interreg, Regione Friuli V.G.
The VICLI project. Identification of virtual districts and diffusion of good practices for strategic territorial planning for certain countries in eastern and southern Europe.
Pordenone, 28 September 2001
- MIT – Italy Program; Banca Popolare di Bergamo
The new economy and industrial districts: challenges and opportunities.
Bergamo, 12-13 October 2001
- Districts Club
Internationalisation paths for industrial districts.
Fermo, 19 October 2001

Publications about districts

General articles and essays

OECD and DATAR
Proceedings of World Congress on Local Clusters
Paris, January 23/24 2001
Datar, Paris

RUR, Censis
Distretti produttivi digitali
Federcomin, Rome, 2001

Districts Club
Check up economico finanziario dei distretti industriali (2000)
Lumezzane, 2001

Studies on districts

Veneto Banca, Museo dello Scarpone di Montebelluna
Rapporto Osem 2000
Montebelluna, 2001

Unione Industriale Biellese, Biella Chamber of Commerce
Economia Biellese 2000
Biella, 2001

V. Balloni, M. Cucculelli, A. Iacopini
La politica industriale per distretto
Confindustria Marche, Banca delle Marche, Mediocredito Fondiario, Ancona

P. Ghiotto
Valenza, il distretto della gioielleria e dell'oreficeria di qualità in
Credito Popolare, no. 1, 2001, pp. 143- 152

Next meetings

- Datar, OCDE
International Conference on territorial Development
Paris, 28/29/30 January 2002