

From Port to Experiences: Tourism-Enabled Cluster Renewal and Firm Strategy in the Douro Region

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Abstract

Wine regions facing maturity pressures increasingly use tourism as a renewal pathway, but less is known about how firms in regulated wine clusters adapt their strategies under such conditions. This study examines how firms in the Douro Demarcated Region, Portugal, respond to new path development and how wine-tourism complementarities reshape their corporate and business strategies. The research is based on an exploratory embedded case study of twelve wine firms, using semi-structured interviews with owners, executives and senior managers. The data were analysed through qualitative content analysis with a deductive–inductive coding approach. The findings show that renewal is mainly driven by two strategic anchors: diversification into wine tourism experiences and expansion of DOC Douro still wines, rather than by rejuvenation of the mature Port wine core. At the business level, firms primarily compete through differentiation, based on quality upgrading, branding, innovation, sustainability narratives and selective investment in tourism-related capabilities. Hybrid efficiency-oriented strategies appear only occasionally. The results also indicate that institutions, intermediaries and cooperative initiatives support coordination, but collective action remains uneven due to fragmentation, asymmetric interests and governance constraints. The study concludes that tourism-led renewal is most effective when it is integrated with product upgrading, experience design and coherent brand orchestration across wine and tourism channels. For policymakers and cluster organisations, the findings highlight the need to strengthen cooperative initiatives and improve coordination between wine value-chain governance and destination management.

Keywords: cluster renewal; clustered value networks; wine tourism ecosystem; firm strategy; diversification; differentiation; coopetition; Douro; Port wine

1. Introduction

Wine regions increasingly compete through experience-based value rather than product attributes alone. In wine tourism, value is co-created across a service ecosystem that includes wineries, hospitality providers, intermediaries, destination organisations and public institutions, combining agricultural, manufacturing and service logics [1,2,3]. This ecosystem perspective emphasises complementarities: narratives, landscape, accessibility, events and digitally mediated “winescapes”

shape how visitors evaluate both the destination and the wine offer [4,5]. For producers, tourism can therefore become a strategic lever that reinforces brand meaning, enables direct-to-consumer engagement and creates learning opportunities in experience design and service innovation.

At the same time, many historic wine regions face maturity pressures (slow growth in legacy categories), rising production and labour costs, climate risk, and governance tensions around regulation and value capture. In such settings, renewal rarely depends on rejuvenating a single product category; instead, it often involves branching into related activities and recombining knowledge bases, partners and institutions—what cluster and regional evolution research describes as new path development [6,7,8]. This makes wine tourism analytically important: it can operate as a renewal mechanism by enabling new revenue streams (hospitality margins and direct contact), new capabilities (branding, digital marketing, service operations), and new inter-industry linkages (accommodation, transport, cruise and cultural tourism).

These dynamics are particularly salient in the Douro Demarcated Region (DDR) in northern Portugal. The Alto Douro Wine Region is a UNESCO World Heritage cultural landscape, with Port wine quality defined and regulated since 1756, and with strong global recognition anchored in fortified wine exports [9]. At the same time, tourism in the Douro has expanded strongly in recent years, including growth in river-based visitation and cruise activity [10]. This creates a setting in which firm strategies must respond simultaneously to a regulated fortified-wine value chain and to a rapidly evolving tourism ecosystem.

Cluster research emphasises location-based externalities arising from dense linkages among firms and supporting institutions [11,12]. The literature provides strong foundations on (i) wine tourism experiences and destination marketing – also for the Douro, where prior studies largely focus on visitor experience evaluation and destination development [13,14], and (ii) cluster evolution and upgrading, including governance and collective action problems in wine clusters [15,16]. However, a key gap remains: we still know relatively little about how firms in a regulated wine value chain make corporate and business strategy choices, and how “cluster mechanisms” (institutions, intermediaries and cooptation) enable or constrain those choices [17,18,7].

Accordingly, this study adopts an exploratory qualitative case approach based on semi-structured interviews with decision-makers in twelve DDR firms. Our objectives are: (1) to document how firms describe cluster dynamics at the intersection of Port wine, DOC Douro still wines and tourism; (2) to identify the corporate- and business-level strategies firms prioritise under these dynamics and

the performance implications they associate with them; and (3) to examine the enabling and constraining mechanisms in the DDR environment.

This study contributes in two ways. First, it uses cluster life-cycle and new path development arguments as an interpretive lens, aligning theoretical ambition with an interview-based case design. Second, it explains how tourism-led complementarities reconfigure strategic options and coordination needs in a mature wine region, with implications for ecosystem governance and policy. The manuscript proceeds as follows. Section 2 reviews the literature and develops the analytical lens linking cluster renewal, value-chain governance and tourism ecosystem complementarities. Section 3 details the methodology and analysis procedures. Section 4 presents findings on strategy patterns and enabling/constraint mechanisms. Section 5 discusses implications for cluster life cycle and strategy theory and wine tourism ecosystem governance. Section 6 concludes with contributions, limitations and future research directions.

2. Theoretical background

2.1 Clusters in wine regions

Clusters are typically defined as geographically concentrated groups of interconnected firms, specialised suppliers, service providers and associated institutions whose co-location enables external economies, knowledge spillovers and innovation [11]. Networks, by contrast, foreground relational assets and governance arrangements that may extend across space and are structured around repeated transactions, trust and power asymmetries [12].

Wine production is strongly shaped by place-based conditions – terroir, landscape, and governance regimes, making wine activity structurally prone to geographic concentration and related/supporting activities [19]. Historically, wine firms have tended to agglomerate around wine-growing regions as they professionalised production and expanded export markets, which encouraged systemic organisation and coordination mechanisms typical of clusters [20].

In wine regions, the following two logics often coexist. A regulated appellation system can anchor a location-based identity while the value chain may be governed by powerful intermediaries (shippers, brokers, distributors) whose relationships extend globally. Brito [21], for example, characterises Port wine as a networked sector shaped by institutional and social dynamics as well as by economic coordination. From a global value chain (GVC) perspective, vertical governance

patterns (market, modular, relational, captive and hierarchical) affect upgrading opportunities and the distribution of value [22].

Therefore, within a cluster, a geographically bounded production and service system, a vertical value-chain linkages coexist with (and are sometimes reinforced by) horizontal ties such as cooperation, collective branding, shared infrastructures and joint problem solving. This framing aligns with typologies of spontaneous clusters that distinguish informal clusters, organised clusters and innovative clusters [23,12].

From a cluster perspective, wine tourism creates inter-cluster linkages: wine firms connect with hospitality, transport, cultural/heritage tourism and event ecosystems. Porter's original discussion of the California wine cluster highlighted the importance of related and supporting industries and of institutions that coordinate reputation and upgrading [24]. Wine tourism research shows that experiences are co-created across actors and that demand is heterogeneous, with segments differing in motivations, involvement and willingness to pay [1,25]. For wineries, this implies that diversification into tourism is not simply 'adding a tasting room': it requires designing experiences, aligning service quality, managing intermediaries and integrating sustainability narratives into marketing [26,27].

In Portugal, wine has also been framed as a strategic domain for economic specialisation and export competitiveness [28], and the Douro Demarcated Region (DDR) – whose economic base combines Port (fortified) wine and DOC Douro still wines, has long played a central role in national value creation and international market presence [29,30]. At the same time, the region faces restructuring pressures associated with maturity/decline tendencies in core fortified wine markets and a growing strategic role for tourism and experience-based diversification [31]. Importantly, DDR's configuration has not been static. Historically, coordination around fortified Port wine relied heavily on relational governance within a regulated value chain—closer to an informal cluster/network configuration. Over time, policy-backed cluster initiatives and specialised institutions have formalised coordination (ADVID – Associação para o Desenvolvimento da Viticultura Duriense that manages Douro Region Wine Cluster; Universidade de Trás-os-Montes e Alto Douro—UTAD; Instituto dos Vinhos do Douro e do Porto—IVDP), and ADVID's appointment as managing entity of the National Wine and Vine Cluster in 2017 signals a shift toward a more organised cluster configuration [32]. Tourism-led experimentation and new knowledge bases (experience design, digital marketing, sustainability) introduce innovation-cluster features, but these remain uneven

across actors and sub-sectors. Therefore, in the Douro, inter-cluster linkages are visible in river cruise tourism, accommodation and gastronomy, and UNESCO-related heritage branding, which jointly shape the opportunity structure for wine firms.

In this regard, following prior work we analyse the DDR through a cluster lens [29]. Rebelo and Caldas [29] explicitly apply a cluster approach to the DDR, identifying its constitutive actors—winegrowers, cooperatives, winemakers, traders, input suppliers, cultural heritage and tourism operators, R&D institutions (UTAD, ADVID) and regulatory bodies (IVDP, Casa do Douro) – and the linkages among them. This analytical choice also has institutional grounding: the DDR was formally recognised as a cluster in 2009, when ADVID was established as its managing entity, and in 2017 ADVID was appointed managing entity of the National Wine and Vine Cluster, embedding the region within the broader national competitiveness strategy [32]. Thus, in DDR cluster three conditions are present: (1) place-based specialised assets (landscape/terroir, appellation governance, skilled labour); (2) dense linkages among firms and support organisations (research and extension bodies, regulators, tourism/destination actors); and (3) observable horizontal ties and collective action (knowledge diffusion routines, cooperative/coopetitive initiatives).

However, despite this formal recognition, the cluster's organisational capacity to solve collective action problems remains a challenge; Rebelo and Caldas [29] themselves note a high degree of fragmentation and weak inter-group confidence among economic actors, partly compensated by the regulatory framework but not resolved by it. So, the DDR's capacity to solve collective action problems (CAPs) at the cluster level remains limited when compared with more purposefully organised wine clusters such as those in Chile or New Zealand, where coordinated governance structures have proved more effective at aligning actors around shared competitive goals [16,33]. In the DDR, longstanding institutional tensions – for instance between organisations governing fortified and still wine interests, or between grape producers holding different production rights – illustrate persistent difficulties in converging on collective objectives, suggesting that the region's organisational arrangement sits closer to an informal or transitional cluster configuration than to the highly coordinated models observed elsewhere.

2.2 Firm strategy under path development of cluster life cycle

Cluster life-cycle (CLC) models describe how clusters evolve through phases such as emergence, growth/development, maturity/sustainment, decline and transformation/renewal [34,35,36].

A cluster enters a development path when it reaches a critical mass of heterogeneous actors and begins to generate positive externalities that attract newcomers and stimulate spin-offs [37,34]. As focal firms gain strength, they can act as “trailblazers”, increasing employment, enabling more specialised labour markets, and stabilising innovation networks and supplier–customer relations [6,34,38].

During development, spatial and thematic boundaries become clearer and cluster-specific institutions and support organisations become more visible, enabling more structured collaboration, knowledge diffusion routines, and stronger formal and informal cooperation networks [39,40]. As competition intensifies and markets expand, clusters increasingly face international rivalry; firms respond not only through internal upgrading but also via outward-oriented strategies—exporting, expanding distribution, and building reputation beyond the region [41]. Crucially, development is also when horizontal ties (cooperation/coopetition) tend to become strategically meaningful: they can support joint upgrading, shared branding, and coordination for market access and innovation [17,18].

Path development research highlights that renewal may involve branching into related activities, the infusion of new knowledge bases and the reconfiguration of institutional arrangements [7].

In the Douro context, the industry-life-cycle of fortified Port wine (mature and facing long-term demand pressures) intersects with growth in DOC Douro still wines and with the expansion of tourism activities and experience offerings [32]. This intersection suggests that ‘renewal’ may be driven by inter-industry complementarities rather than by the rejuvenation of a single homogeneous industry. This focus is also consistent with longitudinal evidence on DDR’s cluster dynamics. Using a stage/path identification model and secondary data, Ostapenko et al. [32] argue that DDR underwent a longer period of transformation from the 1990s onward and entered a (new) growth stage / path’s development from around 2010th, supported by new ‘anchors’ such as DOC Douro still wines, new consumption forms of Port wine and the rapid expansion of tourism.

Within clusters and value chains, upgrading is a critical bridge between strategy and performance. The GVC literature distinguishes product, process, functional and chain/inter-sectoral upgrading [22]. In regulated wine value chains, functional upgrading may involve moving into bottling, branding, direct distribution or tourism/hospitality services; inter-sectoral upgrading may involve branching into experiences and place-based services.

Drawing on a synthesis of CLC studies, Ostapenko et al. [42] highlight corporate diversification and internationalisation as recurrent de-locking mechanisms associated with new path development, while business-level differentiation is generally tied to quality upgrading and value creation. By contrast, cost-leadership logics can be double-edged: they may support efficiency and market reach, yet can also reinforce path-dependent lock-in when they crowd out investments in innovation, training and diversification [43,44].

At the same time, cluster scholars emphasise that horizontal ties – cooperation and competition – can enable upgrading by facilitating knowledge exchange, coordinated marketing and collective problem solving [45,18]. Evidence from wine clusters highlights the role of leading firms, gatekeepers and intermediaries (e.g., brokers, wholesalers, tour operators) in shaping knowledge flows and market access [46,16,47,33].

Collective action is therefore not optional: clusters must solve shared problems (e.g., quality standards, appellation reputation, climate adaptation, labour shortages, destination management) to sustain competitiveness [16]. Where collective action regimes are weak or contested, cluster benefits may be limited and firms may rely more heavily on firm-internal capabilities or on vertical governance arrangements.

Based on the literature above, and consistent with evidence that DDR is currently in a (new) path's development [32], we derive analytical expectations for this. Specifically, we expect:

As clusters move into a development / new-path development stage, firms typically seek growth beyond the local market and reduce dependence on the core (often maturing) segment. Corporate strategy therefore tends to emphasise (related) diversification and internationalisation, which are frequently observed as key drivers of cluster evolution and renewal dynamics [41,44,42].

Proposition 2a (corporate level): In developing clusters, firms are likely to prioritise diversification and internationalisation to extend markets and support new growth trajectories [44,41,42].

At the business-strategy level, development stages are commonly associated with a stronger emphasis on differentiation (quality, branding, innovation), while cost leadership may still be pursued by some firms but with contingent performance effects: it can support competitiveness when aligned with upgrading, yet it can also reinforce lock-in when it crowds out capability-building investments [43,48,42].

Proposition 2b (business level): In developing clusters, firms are likely to compete primarily via differentiation, sometimes combined with cost leadership, whose relationship with performance is context-dependent [43,48,42].

Importantly, as clusters develop and interdependence rises, horizontal ties become more strategically relevant: firms increasingly engage in cooperation/coopetition and mobilise local and extra-local networks to enable collective upgrading, knowledge diffusion, and coordinated market access [17,18,45].

Proposition 2c (cluster behaviour): In developing clusters, coopetition and collective action become increasingly salient mechanisms for sustaining growth and enabling upgrading [17,18,45].

Table 1: Theoretical propositions of firms strategies at new path development

Strategic level	Expected strategic emphasis	Cluster mechanisms/conditions	Key literature (illustrative)	Proposition (to test)
Corporate strategy	Related diversification + internationalisation (export market expansion; channel building)	Rising critical mass; clearer cluster identity; institutional support (R&D/extension, programmes) enabling scaling and market expansion	Belussi [44]; Elola et al. [41]; Ostapenko et al. [42]	P2a: Firms prioritise diversification and internationalisation to extend markets and support new growth trajectories.
Business strategy	Primarily differentiation; selective cost leadership may co-exist (hybrid positioning)	Competitive intensity increases; upgrading becomes central; cost orientation may help when it funds upgrading, but may harm when it reinforces lock-in	Belussi and Sedita [43]; Carli and Morrison [48]; Ostapenko et al. [42]	P2b: Firms compete mainly via differentiation, sometimes combined with cost leadership whose performance effect is contingent (positive or negative).
Cluster behaviour (horizontal ties)	Increasing coopetition/collective action	Higher interdependence; thicker institutions; intermediaries and destination actors coordinate experiences; network ties enable collective upgrading	Conz et al. [17]; Felzensztein et al. [18]; Scur and Garcia [45]	P2c: Coopetition and collective action become more salient mechanisms for upgrading and sustaining growth.

3. Methodology

We adopted an exploratory, embedded case study design [49] to examine strategy making under new path development conditions in a single region while retaining within-case variation across firms. Case study research is suitable for complex, context-dependent phenomena such as cluster renewal and ecosystem governance, where boundaries between phenomenon and context are blurred [50].

The focal case is the Douro Demarcated Region (DDR), Portugal. We defined the case boundary geographically (firms with core production assets or headquarters in the DDR) and sectorally (firms

producing and/or commercialising fortified Port wine and/or DOC Douro still wines, with possible tourism/hospitality activities) [29].

Case selection and temporal framing were informed by prior longitudinal analysis of DDR cluster dynamics indicating a transition into a (new) path’s development since around 2010, with tourism and DOC Douro still wines acting as key ‘anchors’ of renewal [32].

Firms were identified through (i) SABI (Sistema de Análise de Balanços Ibéricos), a commercial database containing financial and structural information on Iberian companies, and (ii) the IVDP registry of certified operators. From these sources we generated an initial pool of eligible firms and applied purposive sampling to maximise heterogeneity in size, age, portfolio orientation (Port vs. Douro), and internationalisation profile. Invitations were sent by email followed by phone follow-ups; additional contacts were obtained via institutional diffusion of the call for participation. Between April and November 2022, we conducted twelve semi-structured interviews with owners, executives and senior managers. Four interviews were conducted in person and eight online (Zoom/Teams). Interviews lasted 50–120 minutes (~22 hours total). Interviewees were selected based on decision-making responsibility for strategy and/or marketing and on substantial sector experience.

Table 2. Interviewed firms and key characteristics

Name	Interviewed	Gender	COMPANY'S SIZE	FOUNDATION	BEGINNING OF INTERNATIONALIZATION	% OF EXPORTS	PRINCIPAL MARKETS	TOTAL MARKETS	% of Port wine in the portfolio
A.	Managing director (CEO)	Male	Medium	Second part of XX century (goes back to XIX/XVIII)	Born global	80% - 99%	France (redistributes), Denmark.	100-150	70%-99%
B.	Managing director (CEO)	Male	Large	XVII century	Born global	80% - 99%	Europe: UK, Denmark; US, Canada	100-150	100%
C.	Chief Commercial Officer, Board Member	Male	Large	1st part of XX century	Born Global	60%-80%	UK, USA, France, Belgium	100-150	until 20% (including)

D.	Owner	Male	Medium	Second part of XX century (goes back to XIX/XVIII)	Born global	80% - 99%	Europe: UK, Germany, Belgium, Holland, Denmark. US, Canada.	30-60	70%-99%
E.	Managing director (CEO)	Male	Large	XIX century	Born global	80% - 99%	Europe: UK, Belgium, Holland, US.	100-150	70%-99%
F.	Managing director (CEO)	Male	Medium	XIX century	Born global	60%-80%	Germany, Sweden, Canada, US, Norway, UK.	60-80	40-50%
G.	Owner	Male	Medium	1st part of XX century (goes back to XVII)	Born global	60%-80%	Brazil, UK, Sweden, Germany, US, Canada	30-60	until 20% (including)
H.	Owner	Female	Small	XXI century	Gradual	20%-40%	Holland	until 10 (including)	0%
I.	Owner	Female	Small	XXI century	Born global	100%	Poland, UK, Denmark, Brazil, Holland, China, France.	until 10 (including)	70%-99%
J.	Owner	Male	Small	Second part of XX century (goes back to XIX/XVIII)	Gradual	60%-80%	Brazil, China, Germany, Belgium, Switzerland, France	until 10 (including)	0%
K.	Owner	Male	Medium	Second part of XX century (goes back to XIX/XVIII)	Born global	20%-40%	Brazil, US, Europe (Switzerland, Poland, UK), China	30-60	until 20% (including)
L.	Owner	Male	Medium	Second part of XX century (going back to XIX century)	Born Global	80% - 99%	US, Holland, Denmark, UK, Canada, Germany, Japan.	30-60	70%-99%

Thus, there is the following distribution of organizations:

- Firm size: 3 small, 6 medium, 3 large
- Internationalisation: 10 born global, (i.e., firms whose export orientation was established from early operations; for older firms founded in the XVII–XIX centuries this reflects the historically trade-oriented nature of Port wine, though the label should be interpreted with caution given the communication and shipping constraints of those eras), 2 gradual
- Export intensity: 6 high ($\geq 80\%$), 4 medium (60–80%), 2 low (20–40%)
- Market scope: 3 serve ≤ 10 markets; 4 serve 30–60; 1 serves 60–80; 4 serve 100–150
- % of Port Wine in the portfolio: 1 firm = 100%; 5 firms = 70–99%; 1 firm = 40–50%; 3 firms $\leq 20\%$; 2 firms = 0%

We applied purposive maximum-variation sampling to capture heterogeneity across the value chain and strategic profiles (firm size and age; export intensity; product portfolio mix between fortified Port wine and still DOC Douro wines; and degree of involvement in wine tourism).

The interview guide was developed from the literature and organised around four blocks: Characterization of the firm; Corporate and business strategies; Performance and Cluster dynamics' influence.

Table 3: The interview guide

TOPICS	QUESTIONS	DESIRED INFORMATION
Characterization of the firm	The year of firm's foundation? Number of employees Total sales (2019) % of exports on sales (2019)? First year of exports by the firm How many export Markets (2019)? First 5 markets of exports (2019)?	
Corporate and business strategies	<i>What strategies has your company followed for the past 10 years?</i>	Identify the pursued strategies: 1. <i>Corporate Level:</i> vertical integration, product diversification, internationalization 2. <i>Business Level:</i> cost leadership, differentiation, focus <i>Cooperation/Coopetition</i>

Performance	<i>How would you evaluate your company's <u>performance</u>?</i>	Analyze the company's performance, namely through: <i>Sales / markets</i> Return on investment (ROI), market share, profit margin in sales, ROI growth, sales growth, market share growth and global competitive position [51].
Cluster dynamics' influence	<i>How cluster's environment influences firm's strategic direction and performance?</i>	Ways by which cluster's environment influences firm's strategic direction and performance

The semi-structured format enabled follow-up questions adapted to each firm's profile [52].

To address time-horizon ambiguity, questions explicitly invited reflections on strategic change 'over the last decade' and included probes for the COVID-19 shock and the recovery period, recognising that 2020–2021 represented a major discontinuity.

Interview recordings were transcribed and analysed using qualitative content analysis supported by NVivo. Coding followed a deductive–inductive logic [53,54]. Deductive codes captured corporate strategies (diversification, internationalisation, vertical integration), business strategies (differentiation, cost-efficiency, focus). Inductive coding captured emergent themes and refined categories through iterative comparison.

Figure 1: Coded firm's strategies for DDR cluster



4. Findings

Findings are organised around the research questions and the theoretical expectations for a cluster in (new) path development. Table 4 summarises the strategic themes identified across the twelve interviews; the counts indicate how many firms mentioned each theme (prevalence across cases, not the intensity of adoption). Overall, respondents portray renewal in the DDR as a shift from a Port-centred configuration toward a broader wine-tourism ecosystem in which experiences, place branding and service partners become strategically salient. We report corporate-level strategies first, followed by business-level positioning, perceived performance, and the mechanisms through which the cluster environment enables or constrains strategic choices.

Table 4: Strategies in the DDR cluster

CORPORATE STRATEGIES	
1). DIVERSIFICATION	12
1. Tourism	12
2. Douro wine	11
3. Olive oil	4
4. New wine regions at national level	3
5. Other drinks	3
6. Fruit	3
7. Jams	2
8. Provision of services - rental of facilities as a way to diversify activities	2
9. Porto as diversification	2
10. honey	1
11. non-core activities	1
12. new regions at international level	1
2) VERTICAL INTEGRATION	8
Downstream (own distribution & commercial subsidiary)	5
Upstream (growth through property purchase)	7
2.1. Outsourcing	3
3). INTERNATIONALIZATION (beginning of internationalization and new markets)	7
BUSINESS STRATEGIES	
1) DIFFERENTIATION	11
1. Product quality	9
2. Bet on the brand, marketing and communication	8
3. Innovation (transversal and packaging)	8
4. Organizational strategy - importance of internal management (adaptability, flexibility and resilience)	7
5. Investment in new facilities	6
6. Sustainability	6
7. Distribution focused on quality, attention, exclusivity	5
2) Focused differentiation (High price)	6
3) Hybridization	3
Well positioned in terms of cost and benefit	1

Cost-effectiveness	1
Efficiency gains	1

4.1 Corporate-level strategies

Diversification emerged as the most pervasive corporate strategy: all interviewees described extending activities beyond the traditional Port-focused business. Across cases, two diversification avenues dominated: (i) wine tourism and experience offerings in the Douro Valley (12/12) and (ii) expansion of DOC Douro still wines (11/12). Respondents framed both as renewal “anchors” that complement a mature fortified-wine core and allow value capture through direct-to-consumer contact, hospitality margins and place-based storytelling.

Tourism diversification was typically described as a move beyond “classic” cellar visits in Vila Nova de Gaia toward experience design in the Douro itself (tastings, lodging, gastronomy, events and guided activities). As Interviewee G noted, “There’s a big change in this paradigm.” Several firms also highlighted that tourism amplifies brand visibility in export markets through visitor-mediated reputation effects.

Diversification into DOC Douro still wines was commonly contrasted with the slower dynamics of Port. Interviewee D summarised this logic: “The production of Port is somewhat stagnant and that of the Douro is growing faster.” Firms emphasised that this shift requires not only vineyard and production adjustments, but also distinct portfolio and marketing strategies.

Beyond these two anchors, diversification varied systematically by firm profile. Small and medium-sized firms more often mentioned complementary regional products (e.g., olive oil, honey) and service-based options (e.g., facility rental), while larger firms more frequently reported experimentation with other drinks and geographic expansion into additional wine regions. These differences reflect heterogeneous resource bases and risk-spreading logics across the sample (Annex I).

Internationalisation was mentioned by seven firms as a current strategic focus. For younger and smaller firms, it was described as active market expansion and channel building; for older and larger firms, it was more often framed as consolidation and portfolio management across established markets.

Vertical integration was reported by eight firms. Backward integration (e.g., vineyard/property acquisition) was frequently justified as a way to stabilise grape supply and reinforce quality control. Forward integration (e.g., distribution subsidiaries) appeared mainly among medium and large

firms, whereas outsourcing arrangements were more typical among smaller and younger firms as flexible responses to resource constraints.

Taken together, the corporate-level evidence points to a renewal pattern centred on tourism and DOC Douro still wines, complemented by selective vertical integration and outward market expansion, with the form of diversification varying by firm size, age and international profile.

4.2 Business-level strategies

At the business-strategy level, differentiation was the dominant competitive logic (11/12 cases). Firms described multiple bases of differentiation, most consistently: product quality, brand building and communication, innovation, organisational capabilities, sustainability narratives, and distribution practices.

Quality was the most frequently cited differentiator (9 firms) and was often linked to premiumisation. Interviewee B observed: “We are seeing a profound change in terms of consumption... a shift to premiumization.” In Port, this was associated with greater emphasis on aged and special categories as a route to sustaining value in a mature segment.

Branding and marketing were presented as central for competing in super-premium positioning and for communicating both heritage and innovation. Interviewee K captured this emphasis succinctly: “Our first priority was to create a brand; the second was to create a brand; the third was to create a brand.”

Innovation was described as transversal (product, packaging and portfolio experiments) and often linked to renewing consumption occasions and engaging younger consumers. Several firms also connected innovation to investment in internal capabilities and external knowledge sources.

Organisational capabilities, such as adaptability, flexibility and resilience, were positioned as enabling responses to shocks and changing preferences, supported by professionalisation of sales/marketing functions and closer customer relationships. Investment in facilities and technology was also described as both “physical evidence” of quality and an enabler of tourism and hospitality. Sustainability appeared as a differentiating narrative (6 firms), most often through organic and/or biodynamic wines and broader low-input sustainable viticulture practices. Respondents framed sustainability both as a market expectation and as a longer-term response to environmental pressures.

Distribution strategies differed across firms. Some avoided large retail channels to preserve exclusivity and closer distributor relationships, while others emphasised selective scaling. Across both approaches, respondents highlighted the strategic role of intermediaries—importers, distributors and on-trade partners—in shaping market access and brand positioning.

Focused differentiation via premium pricing was common (6 firms), particularly in Port. Alongside this, a small subset of cases reported hybrid positioning—combining differentiation with explicit efficiency/cost-benefit logics, typically as a pragmatic response to resource constraints or to the need to reach broader segments.

Overall, business-level positioning converges on differentiation, while hybridisation appears as a secondary pattern among smaller/younger firms or those seeking broader reach.

4.3. Cooperation/cooperation and collective action.

A key pattern relevant to cluster dynamics was the salience of cooperation/cooperation: many respondents explicitly described joint promotion, knowledge exchange and resource pooling as necessary to scale reputation and respond to shared constraints. Interviewee E stated, “It is necessary that everyone work together,” while Interviewee B stressed that joint actions increase market impact: “jointly we have much more impact than if we did so individually.” Several respondents framed this as a “grow the pie” logic rather than zero-sum rivalry: “we must increase the size of the cake... not go after the cake slice” (Interviewee E). At the same time, respondents noted coordination limitations and uneven participation: Interviewee A emphasised that cooperation “cannot be top-down, it has to come from the initiative of companies,” and Interviewee I observed that actors often “paddle a lot on our own,” compared with more coordinated competitor regions. These accounts suggest that collective action is increasingly perceived as strategically important, while also remaining uneven and contested across the cluster.

4.4. Perceived performance

Most respondents reported broadly positive performance trajectories over the last decade, although they described different growth patterns and different preferences regarding growth pace. Smaller and younger firms pursuing gradual internationalisation emphasised resource constraints and the burden of upfront investments; larger and highly export-oriented firms described steadier improvement.

COVID-19 was repeatedly framed as a discontinuity. Tourism-dependent firms reported sharper disruptions, whereas some firms benefited from stronger off-trade/export channels during the same period. Interviewee B captured the baseline challenge: “the mere fact of growing in a mature sector is already in itself remarkable.”

Respondents also expressed a trade-off between rapid expansion and stability. As Interviewee A noted: “I want to continue to grow but in a sustained way... if you grow too fast, you still fall faster.” Overall, perceived performance is positive but contingent on portfolio choices (Port vs. DOC Douro and tourism intensity), export intensity and exposure to shocks.

4.5 Influence of the cluster environment

All respondents emphasised that the DDR environment shapes both strategic options and performance. Several described the region’s recent visibility and dynamism as creating a “window of opportunity” for investment and diversification; Interviewee E characterised the cluster as “an almost living animal ... what moves and moving everything else moves.”

- Place-based assets. Respondents highlighted landscape, terroir and appellation reputation as “legitimacy cues” that support both wine and tourism positioning. These assets were repeatedly described as central to place branding and experience design.
- Institutions and support infrastructure. Institutional actors—especially ADVID, IVDP and UTAD—were frequently credited with technical knowledge, research dissemination and coordination support, particularly under climate and sustainability pressures. Respondents also described institutions as enabling smaller firms to access resources and expertise that would be difficult to generate internally.
- Intermediaries and tourism partners. Firms pointed to growing collaboration with distribution and tourism partners—accommodation providers, tour operators, cruise-related channels, and distributors/importers—as mechanisms through which experiences and brands reach markets. These actors were often described as shaping visibility, access and positioning, reinforcing the role of gatekeepers in both wine and tourism channels.

Finally, respondents stressed that influence is not one-directional. Several portrayed firm agency as shaping the cluster’s trajectory through investment, innovation and partnership building; as Interviewee K put it, “this isn’t just one direction, it’s bilateral ... the influence is bilateral.”

5. Discussion

The findings can be interpreted through the analytical expectations developed in Section 2 for clusters in (new) path development, while recognising the exploratory scope of a single-region case and the interview-based nature of the evidence. Rather than implying “stage validation,” the results are best read as showing how firms interpret and enact under conditions associated with new path development – namely branching, upgrading, and the reconfiguration of complementarities across related activities [41,44,42]. In this sense, transformation and growth in the DDR appears less about rejuvenating a single legacy category and more about recomposing the regional value proposition by adding experience-based services, place branding, and new channels around the wine core.

Corporate strategy patterns align with the idea that diversification and outward market orientation are recurrent mechanisms through which clusters “de-lock” and open new trajectories [44,41]. In the DDR, diversification is anchored in two dominant directions—wine tourism/experiences and DOC Douro still wines—supported by selective vertical integration and, for some firms, experimentation beyond the region. Analytically, these moves can be read as both opportunity capture (tourism demand and stronger place-based branding) and risk management in a context where the fortified-wine core faces maturity pressures [32]. Importantly, diversification here is not simply “more products”; it often implies a shift in value capture logic, from product margins in mature categories toward margins and learning from services, direct contact with consumers, and brand amplification through visitation.

Wine tourism operates not merely as “another diversification activity” but as an inter-cluster linkage mechanism: wineries connect to hospitality, transport, cultural/heritage tourism and event ecosystems, and they must manage gatekeepers such as tour operators, cruise interfaces and distribution partners. This raises an important interpretive implication: renewal becomes a coordination problem across two systems – the wine value chain and the tourism ecosystem, each with its own intermediaries, quality signals, and power structures. Accordingly, tourism-led renewal is not automatically “cluster upgrading”; it is contingent on how firms and institutions align experience design, branding, and channel governance so that tourism complements (rather than substitutes for) product upgrading and export competitiveness.

At the business-strategy level, differentiation clearly dominates, reinforcing arguments that value creation in mature contexts depends on upgrading, quality, branding, innovation, and narrative construction, rather than on a generalised cost-leadership logic [43,44]. At the same time, the limited

presence of hybrid/efficiency positioning points to an important boundary condition: cost orientation appears selective and situational, not a stable strategic archetype. This supports a “double-edged” interpretation: cost leadership can be beneficial when it enables upgrading investments or stabilises operations, but becomes harmful when it crowds out capability-building and reinforces lock-in [43,48,42]. In other words, the DDR evidence suggests that the relevant question is not whether firms “use cost leadership,” but how efficiency is integrated (or not) into an upgrading trajectory.

The results suggest that cluster effects exist, but they are uneven and governance-intensive. On the enabling side, firms repeatedly emphasise institutional thickness (ADVID/UTAD/IVDP) and partnerships that support knowledge diffusion, legitimacy, and coordinated visibility. On the constraining side, the DDR is also shaped by regulated value-chain governance and powerful intermediaries—features that resemble vertically governed chains as much as horizontal cluster dynamics. This matters analytically because it helps explain why some “cluster mechanisms” (joint promotion, shared events, tourism collaborations) are visible, while deeper forms of collective upgrading (e.g., coordinated innovation agendas or unified positioning) remain contested or uneven. The evidence therefore aligns with work emphasising co-competition and intermediaries as enabling mechanisms in cluster evolution, but it also illustrates the coordination problem: cooperation is widely valued yet difficult to sustain when incentives, resources, and bargaining power differ across actor groups [17,18,16,45].

Indeed, the DDR’s difficulty in resolving cluster-level collective action problems – such as tensions around grape allocation between fortified and still wine categories, or the historically fraught relationship between key regulatory bodies – stands in contrast with the more effective coordinated governance observed in wine clusters like Chile and New Zealand [16,33]. This suggests that while the DDR exhibits cluster features, its organisational capacity to converge on shared competitive goals remains a structural limitation that conditions the scope of tourism-led renewal.

Taken together, the findings provide interview-based support for the three propositions in a conditional sense. P2a is reflected in pervasive diversification (tourism and DOC Douro) and continuing outward market orientation, though the form of branching varies with firm resources and legacy positions. P2b is reflected in dominant differentiation and upgrading logics with selective hybridisation, consistent with the contingent role of efficiency strategies. P2c is reflected in the salience of institutional brokerage and cooperative/co-competitive practices, while also indicating that

collective action frictions and asymmetries (e.g., uneven openness, different incentives, regulatory constraints) may limit upgrading in specific arenas. These boundary conditions are analytically important: they suggest that tourism-led renewal is most likely when it is coupled with upgrading investments and credible coordination mechanisms, rather than treated as a standalone substitute for product/market renewal.

6. Conclusion

This study examined how firms in the Douro Demarcated Region (DDR) interpret new path development dynamics and translate them into corporate- and business-level strategies at the intersection of fortified Port wine, DOC Douro still wines and wine tourism. Using an exploratory interview-based case design with decision-makers, we analysed strategy patterns and the mechanisms through which the DDR environment enables or constrains strategic choices, interpreting the evidence through cluster life-cycle and new path development expectations.

Three main conclusions emerge. First, at the corporate level, renewal is largely enacted through related diversification, with tourism/experience offerings and DOC Douro still wines functioning as the dominant “anchors” of strategic branching. Firms frame these moves as both opportunity capture (place branding, direct contact with consumers, hospitality margins) and risk management in a context where the fortified-wine core is perceived as more mature. Second, at the business-strategy level, firms converge strongly on differentiation, namely, quality upgrading, branding and communication, innovation and sustainability narratives, while explicit efficiency/cost-benefit logics appear selectively and pragmatically. This supports a contingent interpretation of cost orientation: it can be complementary when it enables upgrading, but may be problematic when it crowds out capability-building investments. Third, the DDR exhibits cluster effects, but in a form that is uneven and governance-intensive. Respondents highlight institutional support and growing partnerships around tourism as enabling conditions, yet they also point to coordination frictions, asymmetries among actors and the continuing importance of intermediaries and regulated value-chain governance, which shape how far collective upgrading can progress.

These findings contribute to research on cluster renewal and wine tourism in three ways. First, they show how new path development in a mature wine region can be driven by inter-industry complementarities, especially tourism, rather than by the rejuvenation of a single product category. Second, they refine stage-based arguments by treating the cluster life-cycle logic as an interpretive

lens: the DDR evidence is consistent with the propositions, but also reveals boundary conditions linked to power asymmetries, gatekeeping and coordination capacity. Third, the study links tourism-led renewal to governance mechanisms, in particular, institutions, intermediaries and coopetition, demonstrating that tourism-led branching is not automatically equivalent to upgrading; it depends on the ability of actors to coordinate experience design, reputation-building and channel governance across the wine value chain and the tourism ecosystem.

Practical implications

Understanding cluster evolution helps managers align strategies with what the region can realistically support at a given moment. For managers in wine cluster, the findings suggest that successful (new) path development requires integrating product upgrading with experience design and coherent brand orchestration, while building capabilities that connect wine and tourism channels (service quality, digital communication, and partnerships with hospitality and intermediaries). For policymakers and cluster organisations, the results highlight the need to strengthen collective action capacity by enabling cooperative/coopetitive initiatives, improving coordination between wine and destination governance, and tackling structural constraints repeatedly raised by firms (notably human capital shortages, infrastructure gaps, and regulatory rigidity that can discourage innovation and responsiveness).

Limitations and future research

The evidence is derived from a single-region case and from interview-based perceptions collected in 2022, a period still influenced by the COVID-19 shock and subsequent market adjustments. The results therefore support analytic generalisation to theory rather than statistical generalisation. Future research could build on this study in three directions: (1) comparative designs across wine regions to assess how different governance models shape tourism-led renewal; (2) longitudinal research tracking how cooperative initiatives and institutional interventions evolve and whether they translate into measurable upgrading outcomes; (3) ecosystem-focused studies examining intermediaries (distribution platforms, tour operators, cruise interfaces) as gatekeepers of both market access and visitor flows, and how their role conditions value capture for different firm types; (4) deeper investigation of coopetition strategies within and across wine clusters, including the mechanisms through which firms balance competitive rivalry with collective action, and the

conditions under which cooperation translates into effective cluster-level coordination; and also, (5) integrating firm-level strategic choices with cluster-level performance indicators within a unified design remains an important avenue for future research.

Overall, the DDR case illustrates how tourism-led complementarities can reconfigure strategic options in a mature, regulated wine region—while also highlighting that renewal is ultimately contingent on the region’s ability to coordinate actors, knowledge and governance across the wine–tourism interface.

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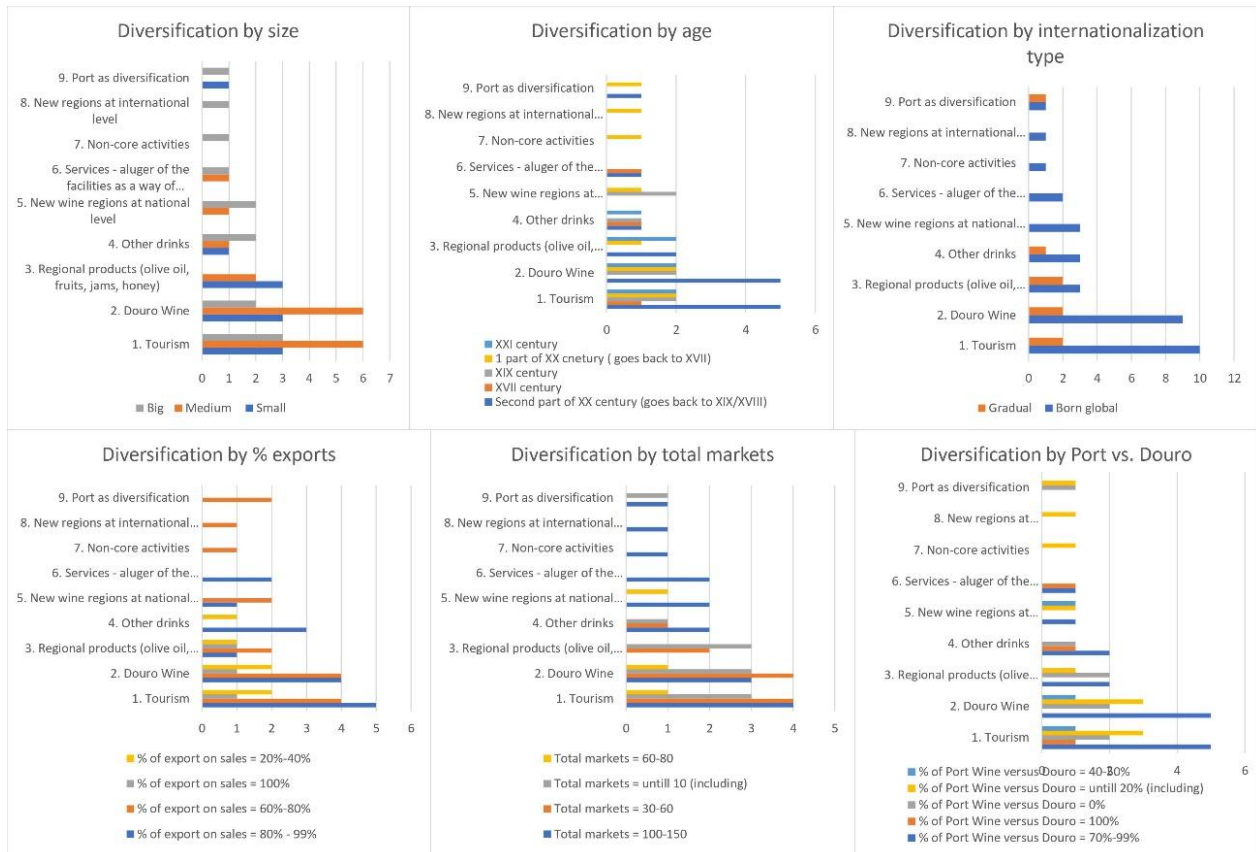
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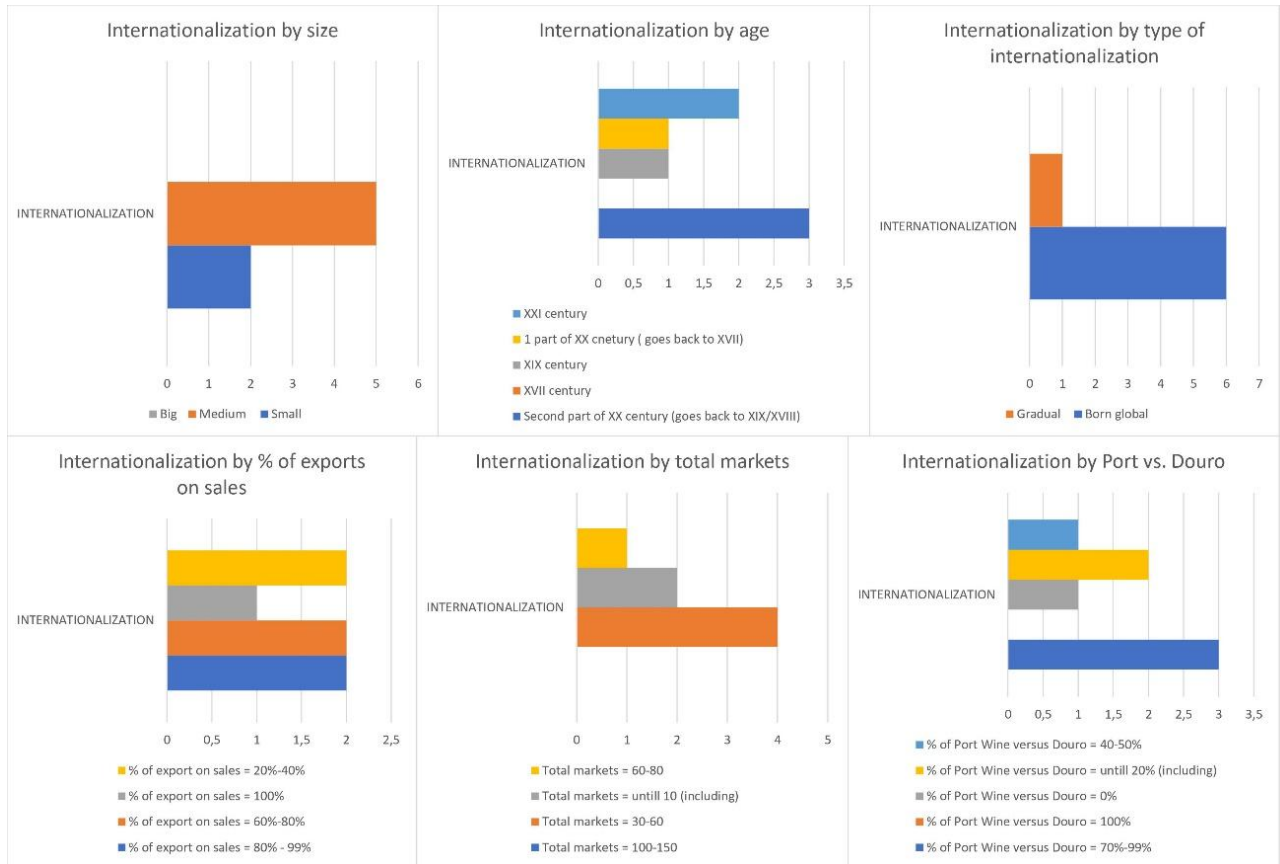
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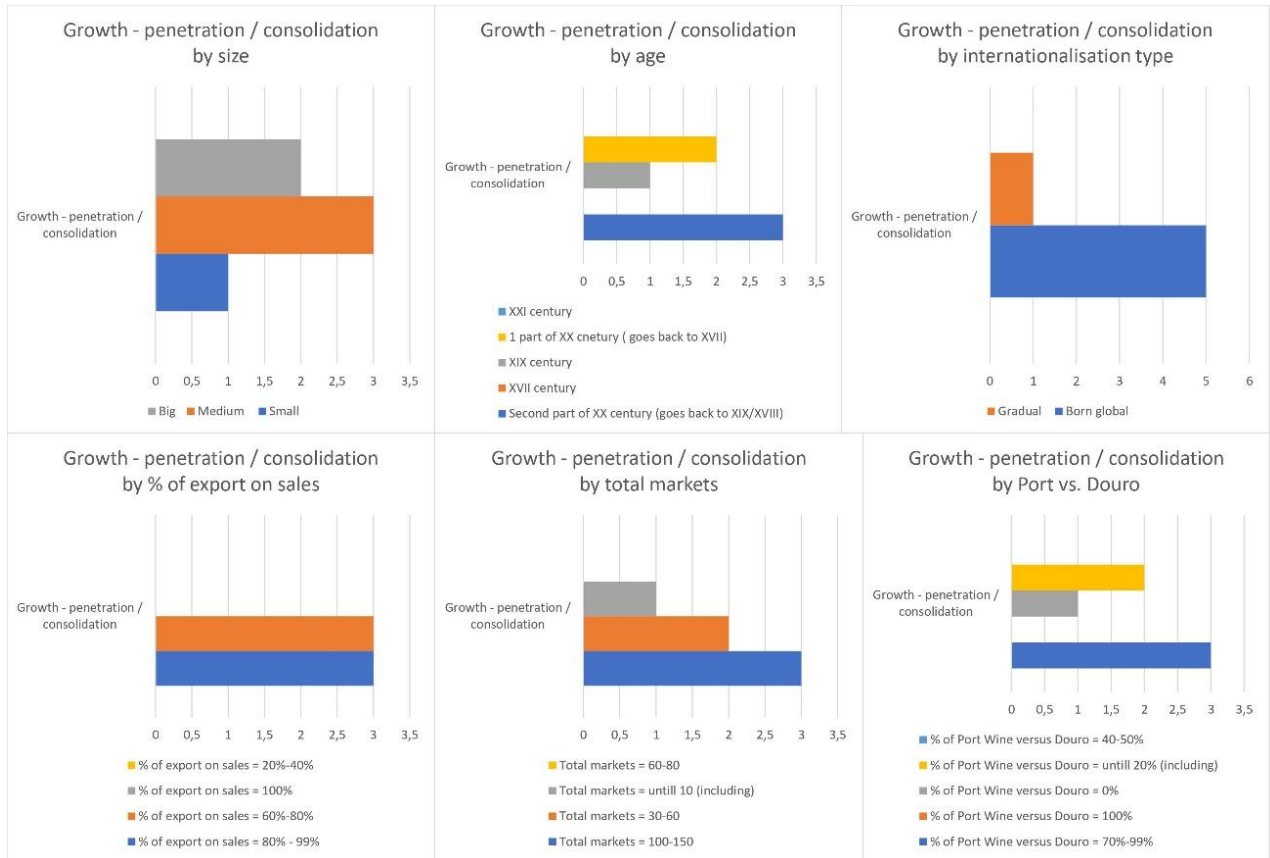
Annex: Firm's strategies by company's type



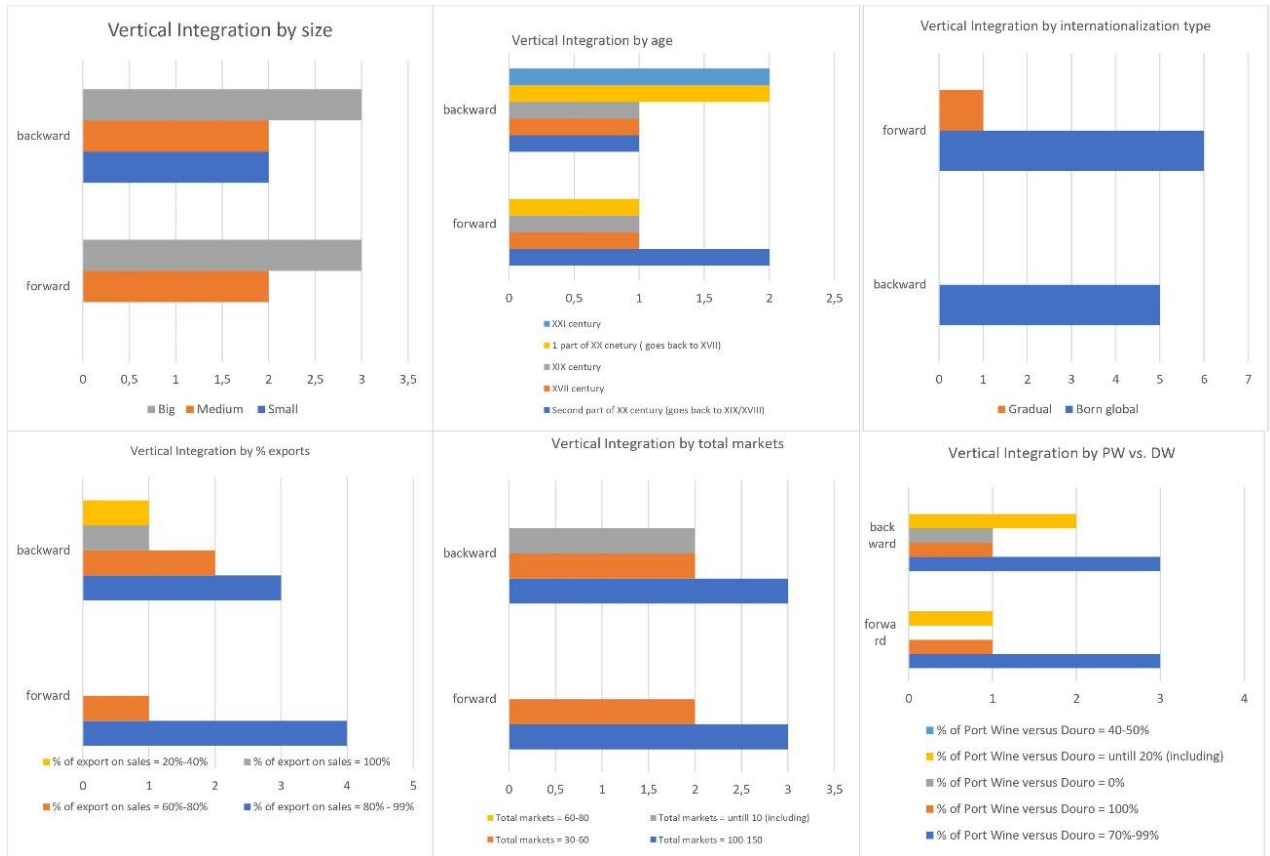
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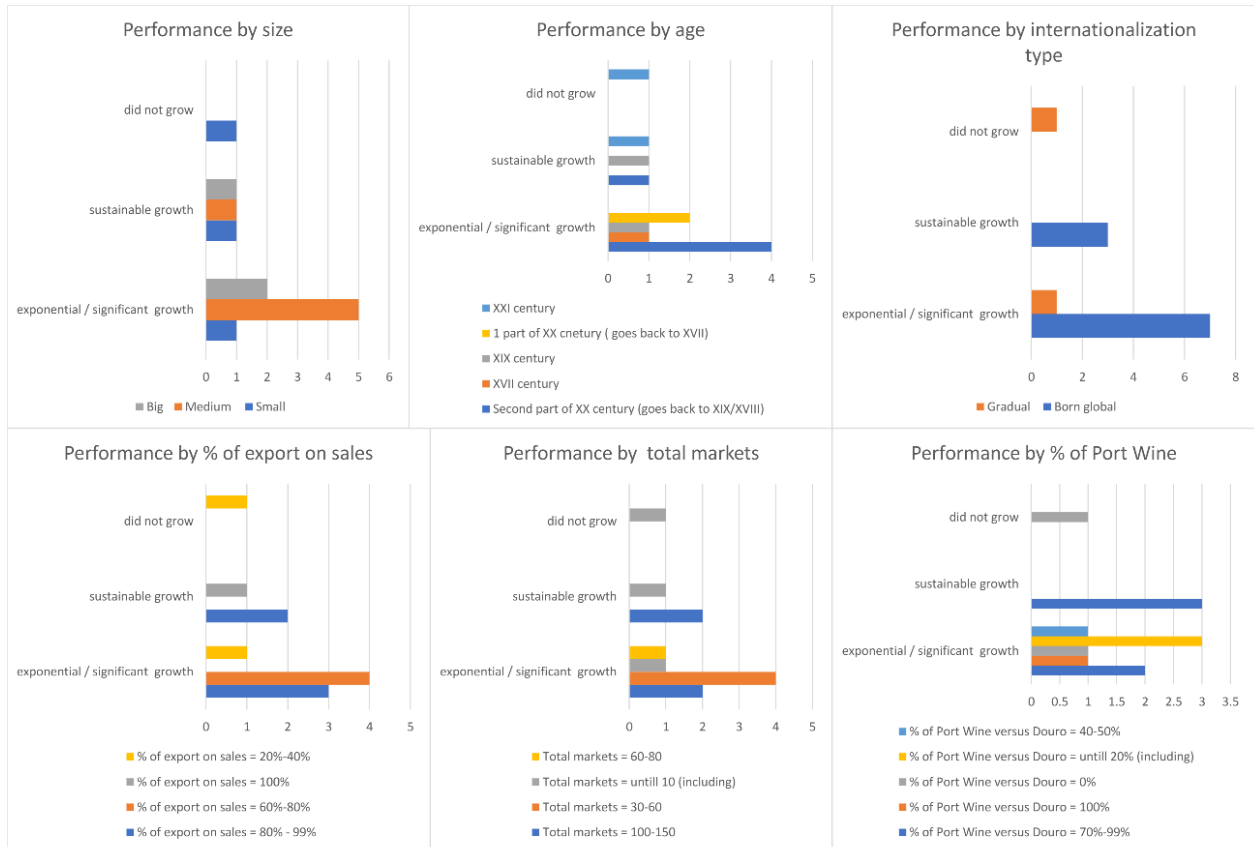
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