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# WORK AND SOCIAL SUSTAINABILITY IN THE WORLD OF WINE: FIRST EMPIRICAL EVIDENCE IN ITALY

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**GAMBERO ROSSO**

Fondazione Gambero Rosso



**LUCI SUL  
LAVORO**

*Immagini, musica e parole che raccontano il Lavoro*

**EQUALITAS**

# PREFACE

The Forum for the Sustainability of Wine was born in 2013 from a wine supply chain aggregation initiative that brought together 34 players: universities, research bodies and business associations, Equalitas, a standards body controlled by Federdoc with various technical partners, with the mission of spreading sustainable development models for the wine supply chain

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Since its inception it has embraced a holistic and inclusive vision of sustainability, aligned with best practices and the most globally widespread doctrines. Its SOPD-Sustainable Wine standard, published in 2017 and already subject to further improvements and updates in 2020, was the first in the world in its field to deal with how to apply social sustainability in business processes, with indicators and good work practices as the most articulated dimension. Even then it was evident that companies, very industrious in pursuing important changes taking place on environmental sustainability issues along the supply chains and markets of reference, needed to develop new programs with reference to work and to the coexistence between businesses and society.

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To this end, over the years Equalitas has invested in building content and in setting up relationships with bodies and institutions specialised in these areas, which were the basis for the birth of the permanent Wine-Work table within the Luci sul Lavoro Festival (with the participation of, among others, Milav, Mipaf, Federdoc, Oxfam Italia, ETI, Systembolaget, Syndicat European Trade Union, Amfori, Valoritalia, Fondazione Consulenti del Lavoro and Sustainable Wine Roundtable). In 2021, thanks also to the collaboration with the Gambero Rosso publishing group, it was possible to conduct an important cognitive survey among Italian wineries which allowed both to photograph their organisational context but also to measure the degree of integration, current and potential, of certain drivers of social development within each of their business models.

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Thanks to the contribution of Prof Enzo Peruffo (University

Luiss G. Carli of Rome) in drafting the questionnaire, assisted by the Technical Scientific Committee of Equalitas and the Luci sul Lavoro Festival, the survey therefore collected important elements from a well-representative sample of Italian wine brands (over 20% of the supply chain, equal to 5500 employees and 2 billion in turnover examined) which were elaborated and investigated by Prof Lorenzo Zanni's team at the University of Siena. The result is a supply chain which is attentive to the issues of work and social sustainability, in particular on more classic aspects, such as wage treatment and safety, but less than it should be for environmental issues and this demonstrates a certain weakness in incorporating the most current governance policies (such as, for example, workers' involvement and gender equality, with over 60% of companies that do not have women among its managerial personnel and managers, for example, but also sustainability reports and certifications in the social scope, present in less than a third of companies), as well as corporate welfare (such as work-life balance or corporate welfare plans that are adopted by just 25% of the sample), albeit in a diversified way between large and small companies, with the latter in greater difficulty

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. It also seems that wineries are not yet seizing the opportunities for a positive outsourcing of these issues, both in communication and marketing and in the interaction with the financial markets, when instead a strong sentiment both along the large-scale distribution supply chains but also in the investment policies of world finance (just think of the relevance of ESG indicators on public financial markets or of the real barriers which have been raised by the large-scale retail trade for fighting labour exploitation on their purchases and which is rapidly spreading also to wine) is evident. It is also evident that there is a cultural gap to be bridged along the supply chain in certain areas of the public policies to incentivise work and its welfare policies: in fact, it is striking that the majority of companies is not at all aware of the instruments created in order to protect their own workers such as FIA and EBAN funds (54% of the sample), as well as

of the incentives for hiring workers (women, young people or those receiving unemployment benefits) which have never been used by more than  $\frac{3}{4}$  of the sample, a figure that should make us reflect on the entire structure of the supply chain relations, which, moreover, demonstrates a lack of internal trade union representation. The survey therefore clearly shows how the wine sector must necessarily address the issue of traceability of good work practices along its supply chain, where this has highlighted that at least 15% of the hours worked in the fields directly managed by the bottling companies is also outsourced (with peaks of over 30%)

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We know how very often this workforce originates from economic migration or is pushed by other humanitarian crises, a field which our sample seems strangely little concerned about (third to last strategic element for the companies questioned). Finally, it appears that the territory, although considered as a strategic element of own labour policies for the purpose of recruiting personnel, is not considered a cluster in which to activate a continuous dialogue with the various stakeholders (such as neighbourhood and local communities) on how to improve the interaction. Finally, we took the opportunity to measure some economic indicators of the companies, during this two-year pandemic, noting with optimism how the vast majority of respondents, despite even double-digit turnover losses, has maintained employment

levels (therefore also with fixed-term contracts, with an employee contraction below 3%) but above all how they consider themselves satisfied with their performance (over 70% of the sample) and expect a strong positive rebound for their 2021 results (over a third of the sample expects growth of more than 20% of its business volumes).

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The results of this important survey carried out in the first half of 2021 will be studied and discussed in the coming months in the permanent wine-work table promoted by Equalitas and the Luci Sul Lavoro Festival, as part of the privileged relationships with the Ministries of Labour and Agricultural Policies. It will therefore be an opportunity to provide the institutions with ideas and thoughts, coming directly from companies, on how to regulate the use of funds to be allocated to the sector as part of the RRP (Recovery and Resilience Plan). However, it is indeed a great result and a source of great pride, for Equalitas and its partners, to have contributed in the last five years to laying the foundations for defining useful indicators of social and labour sustainability for the sector, already incorporated in their standard, creating virtuous networks in order that the wine sector should witness only and always the best results throughout its supply chain and up to the consumer. Yours sincerely,

**Michele Manelli**  
*Vice-President Equalitas*

# INDICE

Abstract	5
<b>1.</b> Research objectives	6
<b>2.</b> Work and social sustainability: theoretical assumptions and measurement indicators	7
<b>3.</b> Methodology and interpretative model	10
<b>4.</b> Results	11
<b>4.1</b> Descriptive statistics	11
<b>4.1.1</b> Structural characteristics of enterprises	11
<b>4.1.2</b> Strategic orientation	14
<b>4.1.3</b> Supply chain relations and relations with the territory	22
<b>4.1.4</b> Company performance	23
<b>4.1.5</b> Work and organisation	25
<b>4.2</b> First results emerging from a statistical analysis by “main components”	30
<b>4.3</b> The role of sustainability certifications and of quality awards	33
<b>4.3.1</b> The role of the Equalitas sustainability certifications	34
<b>4.3.2</b> The role of the Tre Bicchieri Gambero Rosso quality awards	35
<b>5.</b> First summary considerations	36
Bibliography	39

## ABSTRACT

The research provides a first overview of the issues of work and social sustainability in the Italian wine industry through the analysis of the results of a survey on 185 wineries (representing about 20% of the turnover of the sector), interviewed by means of a questionnaire. In particular, the focus is on analysing in depth the strategic orientation towards social sustainability of the top management and the organisation of the work also in relation to the structural characteristics of the companies.

On the basis of some scientific contributions on the subject of social sustainability, together with the experience gained within the Wine-Work Table promoted by Equalitas and the Luci sul Lavoro Festival, some indicators and measurement scales to be applied to the world of wine have been defined; these are indicators consistent with the sustainable development goals declared by international organisations (SDGs) and with financial sustainability rating criteria (ESG).

The empirical check carried out enabled analysing a significant sample of Italian wineries (with over 5,500 employees and 2 billion in turnover) and allowed highlighting the growing role of social sustainability as a driver of business development.

This interest is partly linked to the need to comply with the law and to the topic of environmental sustainability, with a strategic orientation towards social and labour issues which, however, also shows some inconsistencies between what is declared as entrepreneurial sensitivity and actual corporate behaviour.

Acting on social sustainability and on labour currently appears to be a strategy capable of affecting operational efficiency, i.e. costs, while there is a certain difficulty in using this lever to support supply differentiation strategies capable of generating greater revenues. There is a general effort to adapt the world of wine, but this sometimes clashes with operational (cost or organisational problems) and institutional (for example the lack of knowledge of some incentives) difficulties which are worthy of reflection not only for industry operators, but also by the competent institutional bodies.

At the level of entrepreneurial behaviour, we note how attention towards various typical indicators of social sustainability, such as governance and equal opportunities, is inadequate in the supply chain, and how a strategic primacy of the issues related to the sphere of environmental sustainability with respect to labour and social areas in general is still evident among companies.

There is also an attitude that tends to favour internal company logics over actions that involve other players in the territory, even those unrelated to the vertical relationships of the supply chain. Finally, there is a positive correlation between formally obtaining a sustainability certification and the presence of a greater attention towards social issues.

### 1. Research objectives

In Italy, the world of wine has been undergoing profound changes for years which have gradually changed traditional business models, types of products, production processes, the use of new technologies throughout the value chain (both upstream and downstream where online sales methods are spreading), company organisation, strategic orientation by providing value to some topics (think of environmental sustainability), previously considered marginal. All this is obviously having repercussions on the world of labour, with adaptations which record different sensitivities and speeds in Italy according to the territories, companies and institutional players involved. Therefore, this survey on the world of work in Italian wine, which brings out the state of advancement of entrepreneurial orientations, company behaviour, new elements, opportunities, but also the critical issues that companies and workers must face today, appears to be invaluable.

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The economic and social impact of the recent health emergency linked to the Covid-19 pandemic has further brought the issue of work, seen in its various facets, back to the centre of the political debate. Not only have the problems related to health and safety in the workplace been exacerbated by the pandemic, but some changes that have been present for some time have accelerated (digitalisation, globalisation, environmental sustainability), heavily involving the world of work in various sectors, including that of wine.

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The topic of work analysed in this research report is framed within the broader theme of corporate “social sustainability”, a concept well known to Italian entrepreneurs, which is linked to other concepts of corporate sustainability (economic and environmental), but which can take on different profiles, not all of which are considered a priority by the top management. As will more extensively be seen later (§ 2), the concept of social sustainability has received increasing attention in the literature even if a precise, commonly accepted and widely shared definition does not emerge in managerial studies. In the scientific literature, the concepts

of economic, social and environmental sustainability are often analysed jointly (Szolnoki, 2013), this has produced a wide range of taxonomies which has further contributed to fuel the confusion on the exact use of the term (Glavič and Lukman, 2007). For these reasons too, it is not easy to trace quantitative empirical analyses in the literature which explore the impact of sustainability on the structure and set-up of the company and how these affect the creation of value for the company (Santini and Cavicchi, 2011).

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From the viewpoint of strategic analysis, it is recognised that the construction of a socially sustainable business model is a process which develops over time and that takes on a complex nature by investing more interrelated elements; these can be captured and measured through numerous reporting systems which have proliferated in the last twenty years (Bonn and Fisher, 2011; Qasim, 2017). For analytical purposes, some authors suggest focusing on some critical variables and in particular on how these affect the performance of companies (Guthey and Whiteman, 2009); the problem therefore lies in identifying a set of specific indicators which measure awareness towards the topics of work and social sustainability (Ajmal et al., 2018; Popovic et al., 2018). Other authors instead, recommend analysing in depth the drivers, internal and external to companies, which steer towards sustainability in the wine sector, paying particular attention to the issue of corporate organisational skills (Annunziata et al., 2018).

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With reference to the wine sector, we note that surveys have already been carried out in Italy on the issue of environmental sustainability and on how this affects the components of corporate business models (Zanni and Pucci, 2014), while we found no theoretical or empirical detailed studies on the issue of social sustainability in the wine sector based on an adequate number of observations. This research therefore throws a first light on an important issue, even if from the point of view of operational practice it has not yet assumed an unequivocal value for entrepreneurs. Awareness, espe-

cially as concerns the topic of environmental sustainability, has grown very quickly and the world of wine has grasped the importance of change: entrepreneurs know that sometimes it is necessary to review the logics of action and the objectives, favouring a transformation which does not only concern agricultural businesses, but also affects consumers, politics and finance. Verbally, with reference to the topic of work in the world of wine, the interest in social sustainability is high; but we are interested in verifying whether there is a possible misalignment between what is declared by companies regarding their orientation towards social sustainability and their actual behaviour, and, in any case, what gaps need to be filled at a political level in order to make it grow in this sense as well.

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In particular, we are interested in seeing how the issue of social sustainability can be identified as a priority objective for the company and whether, to date, it can represent a real marketing and institutional communication tool for the top management. This is to meet a growing demand from the market (consumers, commercial intermediaries, financiers, institutions) which is beginning to give greater importance to social sustainability indicators alongside those of environmental sustainability. These objectives, in fact, are found at the highest institutional levels, as evidenced by the framework of the Sustainable Development Goals (SDGs) proposed by the

United Nations and by the financial sustainability rating criteria (ESG). As a term of comparison, we can take the concept of environmental sustainability which twenty-five years ago was considered a priority by a small number of pioneering entrepreneurs, but which over time has gained attention and space in the set of corporate targets and investments for the purpose of creating corporate value.

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In particular, there are three main research questions which we intend to answer in this report:

1. What space do work and social sustainability occupy today in the strategic orientation of Italian wineries? Which variables does the orientation towards "social sustainability" affect the most? How pervasive does the concept of "sustainability" of a wine company prove to be within the supply chain relationships and in relations with the territory?
2. Is it possible to identify different levels of orientation towards "social sustainability"? Are there different stages of attention and interest in labour issues?
3. Is there a relationship between orientation towards "social sustainability", work management and organisation models and company performance?

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## 2. Work and social sustainability: theoretical assumptions and measurement indicators

Among the many definitions of sustainability that have been provided in the literature over the years, there is a more or less universal common element, namely the fact of considering this concept, linked to satisfying present needs without affecting those of future generations (Bruntland, 1987), as

having three main dimensions, an environmental one, one that is more financial and a purely social one (Colglazier, 2015). These dimensions are often complementary, where not, in some respects, convergent, but they refer to different domains; if for the first two, the environmental and the eco-

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<sup>1</sup>In particolare, si veda la risoluzione ONU "Trasforming Our World - Agenda 2030", all'interno della quale si fa esplicito riferimento ad indicatori di parità di genere e lotta alle discriminazioni (SDG 5 Gender Equality), giusto livello dei salari (SDG 8 Decent Work and Economic Growth), utilizzo efficiente delle risorse e consumo etico (SDG 12 Responsible Consumption), rispetto dell'ecosistema e tutela del paesaggio (SDG 15 Life on Land).

nomic one, the borders as well as the measuring instruments are now quite accepted, the same cannot be said for what concerns social sustainability, which often takes on a residual role in the debate on sustainability (Ajmal et al., 2018).

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Social sustainability is a dimension with predominantly qualitative characteristics, due to the complex human, psychological and anthropological dynamics which characterise it (Spangenberg and Omann, 2006), and therefore there has long been the need to find tools that would allow a conventional measurement of the company's tendency towards this type of approach (Hutchins and Sutherland, 2008). This problem also emerges in reference to the wine sector, where social sustainability can be generically defined as the ability to guarantee individual and collective well-being, leaving the concept open to many interpretations.

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On a general level, international literature considers social sustainability as a set of interconnected elements which can be summarised by the famous formula "security, empowerment, inclusion and cohesion" coined by the Nobel Prize winner Amartya Sen (1999). The classification has a certain diffusion in the field of social sciences and an academic dignity, but it does not resolve the basic ambiguity regarding the existence of a single procedure for the quantitative assessment of the social sustainability aspects. Subsequent studies have better clarified the area in which we are moving when talking of the social dimension of sustainability, achieving the identification of some essential elements that must be taken into account when analysing it: work is certainly one of these elements.

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As Ahmadi et al. (2017) remind us, among the various themes integrated into the concept of social sustainability we can include: health and social equity, human rights, but also workers' rights, adequate working practices and conditions, justice, community well-being, as well as attention to the needs of all the players which act along the value chain and of the communities in which we operate.

In their significant research on the measurement of social sustainability, Hutchins and Sutherland (2008) reflect on

the importance not only of the corporate productive factors (the classic land, capital, labour in the contemporary version) but also on the contextual elements, along the whole supply chain. Thus, the assessment of the social dimension will take place, through the use of appropriate metrics, by considering the 4 macro-variables of labour equity (e.g. fair salary), healthcare (e.g. investments in welfare for workers), safety (e.g. reduction of accidents at work) and philanthropy (e.g. company contribution to the development of solidarity projects) in light of not only the results of the company as an isolated subject, but taking into account all the players in the supply chain, primarily suppliers and buyers.

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Popovic et al. (2018) takes a step further, reaching the definition of 31 social sustainability indicators grouped into 9 categories, the vast majority of which relate to the issue of work (fair wages, safety, worker well-being, relations between employees, adequate training, equal opportunities). In this way the authors make the double effort to circumscribe, on the one hand, the defining range of action, since in this analysis the three dimensions of sustainability are less superimposable than usual, and, on the other, to broaden as much as possible the range of variables to be taken into consideration for a plausible quantification of social sustainability, as suggested by the main guidelines on the GRI, UN Global Compact and ISO 26000 sustainability reports (Papoutsis and Sodi, 2020; Siew, 2015).

Magee et al. (2013) add an interesting element to the debate by suggesting that in order to correctly measure the corporate social dimension it is advisable to proceed with a bottom-up rather than a top-down approach, involving also, through ad hoc surveys, workers, communities and third-party institutions which interact with the company in question.

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Even if we restrict the field of our analysis to the agri-food sector, some ambiguities remain. While on the one hand, at both national and international level, the social sustainability component appears to be relevant for companies, it takes place with non-homogeneous and disorganised initiatives, often the result of individual initiatives (Food Sustainability Observatory, 2020). The wine sector is no exception even

though it demonstrates some peculiarities and a certain dynamism in this regard (Wine News - UIV, 2021). For some time now, the need to develop strategies more linked to the dynamics and peculiarities of the territory has been underlined in the Italian scientific literature (Zanni and Nosi, 2004), as has the importance of developing business models which take the issue of environmental sustainability into greater consideration (Zanni and Pucci, 2014 and 2019) and, among these, the relevant role played by the more purely social dimension which takes into account organisational skills, training and workers' health (Annunziata et al., 2018).

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Even focusing on the wine sector only, the problem to be solved is the diversity of perspectives that can be used in the choice of indicators. The current growing attention towards the issues of social sustainability has in fact several causes: trade unions (safety, wages, work organisation, training), commercial (responding to the new needs of consumers and to new demands from commercial intermediaries), financial (think of the topic of Benefit corporations and of sustainable finance), institutional (improving controls, need to simplify the administrative framework evidenced by the effort to reach a single standard of sustainability certification), technological (managing the impact of digitalisation on processes and on the work organisation, for example, assessing the implications of new technologies or of smart working), humanitarian. All this has prompted the companies in the wine sector to give initial responses to the "social" requests from workers and the territory, as evidenced by the numerous initiatives organised by the players in the supply chain on issues such as safety at work, the fight against illegal recruitment and the integration of migrant workers (Wine News - UIV, 2021). Among the more concrete actions on the subject of work in the world of wine in Italy, we mention:

- the protocol of product, organisation and territory sustainability certifications developed by Equalitas, the first articulated and concrete initiative in the agri-food sector, which through the verification of specific requirements aims, among other things, at defining indicators on social sustainability, with insights on all the relevant

issues, work in the first place, which this research also took into account when elaborating the questionnaire;

- the "Permanent Wine-Work Table organised, starting in 2020, as part of the "Luci Sul Lavoro" Festival.

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Having acknowledged that in the wine sector the social sustainability requirements are increasingly taking on relevance in relation to different issues (workers' rights, personnel welfare, continuous training, non-discriminatory practices, interaction with local communities, gender diversity, etc..) and that the variables to be considered can be numerous, it is a question of understanding which ones we should focus our attention on, with the topic of work as the main focus. In particular, it is necessary to carry out a shared quantitative assessment which is not that of a "generic" orientation of the company towards sustainability, with the risk of slipping towards declarations of intent that have little to do with the company's impact in terms of social sustainability.

Following what emerged from the empirical analyses of the database (§ 4.2), in this paper we will refer to the following five indicators of direction towards social sustainability for wineries:

- **Work** (social indicators closely related to the field of work).
- **Gender** (indicators linked to gender equality and to the role of women in the company).
- **Territory** (indicators of supply chain interactions and of external relations with the local context).
- **Process** (techniques and operating mechanisms within the company that can be connected to social elements).
- **Environment** (environmental sustainability indicators of an ethical nature and linkable to social sustainability). Although distinct from social indicators, environmental ones have been considered as they sometimes overlap and because we were interested in grasping possible correlations and comparisons between the actions regarding environmental sustainability and those relevant to social sustainability.

### 3. Methodology and interpretative model

This survey is based on a national data collection conducted by Gambero Rosso and Equalitas in the months of May-July 2021; 185 Italian companies in the wine sector responded to an online questionnaire.

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The *sample analysed* represents 5.6% of the companies in the Gambero Rosso database (3,300 companies contacted); 190 questionnaires were initially collected, but 5 questionnaires were discarded and considered invalid. The sample was subjected to a significance test to ensure that it adequately represents the overall characteristics of the Italian wine business (size, legal form, location, company performance). In aggregate terms, it is estimated that the companies interviewed account for a total of about 5,500 employees out of the 34,000 in the sector, therefore equal to 16% , and for a turnover of over two billion euro; considering that overall the turnover of the Italian wine and grape production companies recorded an average value of about 11 billion euro in the analysed period (2017-2019), it is estimated that the relevance of the sample used represents about one fifth of the total value.

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The *questionnaire used*, developed by a mixed scientific committee which both sectoral bodies and universities took part in, consists of 23 questions divided into four thematic areas:

a) Strategic orientation; b) Supply chain relations and relations with the territory; c) Structural data and company performance; d) Census and employment trend. Before the questionnaire was submitted, the questions were subjected to validation by the scientific committee of Equalitas.

The structure of the questionnaire mirrors the research questions identified in §. 1 which privilege questions regar-

ding the issues of work and social sustainability in reference to the strategic orientation of wineries towards sustainability, and towards social sustainability in particular, towards supply chain relationships and relations with the territory, as well as providing indications on structural, performance and employment trends data of the companies involved in the research. Many of the questions posed in reference to the dimensions of sustainability have already been validated in the literature (Annunziata et al., 2018; Popovic et al., 2018), as has the method of collecting the information concerning the company's master data and the statistical processing of the strategic orientation (use of the 5-point likert scale).

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The *data analysis method* chosen was mixed: on the one hand of a qualitative nature, through the interpretation of the results provided by descriptive statistics, on the other a more quantitative one, where it was necessary to proceed with further statistical processing of the data (bi-varied correlations to analyse the degree of association between social sustainability and company performance; application of multivariate techniques with the analysis of the main components, in order to identify clusters of variables regarding social sustainability indicators). When processing the data, the actual responses (absolute values and percentages) have been shown in tables and charts; should the total number of respondents not be equal to 185 companies, this is because of the presence of some non-responses.

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For the purpose of reading the research results, the interpretative model outlined in the this paper is detailed in [figure 1](#).

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Source Federvini-Inps (2019).

InfoCamere - Ufficio studi e ricerche (Study and research office) - years 2019 e 2020.

In particular, the following collaborated in drafting the questionnaire and to these go our thanks: Prof Enzo Peruffo of the Luiss G. Carli University (coordinator of the scientific committee), Marco Sabellico Copy editor of Gambero Rosso, Michele Manelli Vice-president of Equalitas, Stefano Stefanucci Director of Equalitas, Enrico Limardo and Marco Cilento co-founders of the Festival Luci sul Lavoro, Prof Lorenzo Zanni of the University of Siena and member of the CTS Equalitas. We wish to also thank Laura Bello (Equalitas) for her collaboration in the data collection and processing and for her work in refining the graphics (Tables and Figures).

Figure 1: the conceptual model

## ENTREPRENEURIAL ORIENTATION TOWARDS SUSTAINABILITY

(environmental, social, economic)



The choice of testing this model in the wine sector allows us to analyse in depth an important issue for the Italian business system where the concept of social sustainability has been felt for years, but whose specificities have not yet been sufficiently analysed through a quantitative investigation based on an appropriate number of surveys. The

topic also represents an interesting field of investigation both to answer the research questions posed and to start a comparison in the future with other Made in Italy sectors (intersectoral analysis) or with other international contexts in the world of wine (benchmarking with other wine producing countries).

## 4. Results

### 4.1 Descriptive statistics

#### 4.1.1 Structural characteristics of enterprises

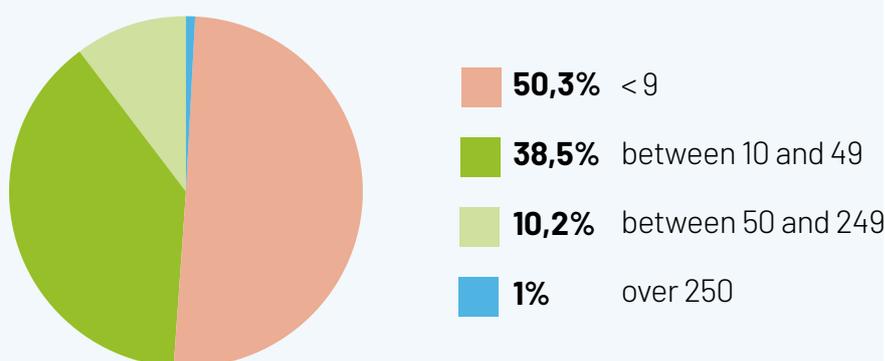
Figure 2 and table 1 detail the characteristics of the sample investigated on the basis of the *dimensional classes in terms of employees*, thus confirming:

- The strong incidence of micro-enterprises under 10 employees which characterises the wine sector in Italy (in our sample they represent 50.3% of respondents);
- The existence of a significant group of small businesses between 10-49 employees (38.5%);
- The very limited number of medium-large companies over

50 employees (11.2%).

Compared with previous surveys, still conducted in collaboration with Gambero Rosso (Zanni-Pucci, 2014), there is generally a smaller number of respondents in absolute terms, but a greater interest from medium-large companies. So, we can hypothesise in the first place that the issue of work and social sustainability seems to be felt more by more structured companies rather than by micro-enterprises where, most likely, the presence of family members involved with different roles and methods in operational activities has a greater impact.

Figure 2: Breakdown of the sample by company size (no. of employees)



**Table 1: Breakdown of the sample by no. of employees**

<b>Classes of employees</b>	<b>Absolute Values</b>	<b>% Values</b>
less than 9 employees	92	50.3%
between 10 and 49 employees	72	38.5%
between 50 and 249 employees	19	10.2%
more than 250 employees	2	1.0%
<b>Total</b>	<b>185</b>	<b>100.00%</b>

The small company size is also confirmed by the analysis of the sample based on the *classes of turnover* which shows that (table 2):

- 47.7% of the companies investigated does not exceed 1 million euro in turnover;
- 35.5% has a turnover that is in the range of 1-10 million euro;

- 16.8% exceeds 10 million in turnover.

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Compared with previous surveys, once again, we note that the present sample has a good number of medium-sized companies which, in terms of aggregate turnover, provide a good representation of the world of reference.

**Table 2: Breakdown of companies by average turnover in the three-year period 2017-2019**

<b>Classes of turnover</b>	<b>Absolute Values</b>	<b>% Values</b>
up to 250,000 Euro	31	17.2%
from 250,000 to 500,000 Euro	27	15%
from 500,000 to 1,000,000 Euro	28	15.5%
from 1,000,000 to 2,000,000 Euro	24	13.3%
from 2,000,000 to 5,000,000 Euro	29	16.1%
from 5,000,000 to 10,000,000 Euro	11	6.1%
from 10,000,000 to 50,000,000 Euro	21	11.7%
from 50,000,000 to 250,000,000 Euro	8	4.5%
Over 250,000,000 Euro	1	0.6%
<b>Total</b>	<b>180</b>	<b>100%</b>

Referring to the geographic distribution of the companies interviewed (table 3 and table 4) we note a good representativeness of our sample on a national basis which allows us to evaluate the data by dividing them over at least three re-

gional macro-areas: North (48%), Centre (33%), South and Islands (19%). The analysis by individual regions also shows a fair coverage of different production areas present throughout the region.

**Table 3: Number of companies by national geographical macro-area**

<b>Geographical macro-area</b>	<b>No. of companies</b>	<b>% Values</b>
North	99	53.5%
Centre	50	27.0%
South and Islands	36	19.5%
<b>Total</b>	<b>185</b>	<b>100%</b>

**Table 4: Number of companies by region**

<b>Region</b>	<b>No. of companies</b>	<b>% Values</b>	<b>Macro-Area (%)</b>
<b>North</b>			<b>53.5%</b>
Emilia Romagna	11	5.9%	
Friuli Venezia Giulia	15	8.1%	
Liguria	2	1.1%	
Lombardy	7	3.8%	
Piedmont	38	20.5%	
Trentino Alto Adige	10	5.4%	
Valle d'Aosta	2	1.1%	
Veneto	14	7.6%	
<b>Centre</b>			<b>27%</b>
Abruzzo	7	3.8%	
Lazio	1	0.6 %	
Marche	8	4.3%	
Tuscany	30	16.2%	
Umbria	4	2.1%	
<b>South and Islands</b>			<b>19.5%</b>
Basilicata	6	3.2%	
Calabria	4	2.1%	
Campania	5	2.8%	
Molise	0	0%	
Puglia	5	2.8%	
Sardinia	8	4.3%	
Sicily	8	4.3%	
<b>Total</b>	<b>185</b>	<b>100.00%</b>	<b>100.00%</b>

On the other hand, if we consider *the year of birth* of the companies interviewed (**table 5**) we can see that:

- 4.9% consists of very young business start-ups (less than 10 years);
- 22.1% consists of companies where, probably, the first generation of founders is still involved (between 10 and 25 years);
- 23.8% consists of companies that have managed or are

managing at least one generational transition process in the top management (between 26 and 50 years);

- 49.2% consists of companies which have experienced two or more generational transitions (over 50 years of activity); among these, 17% consists of companies which can be defined as “long lasting wineries” and which embody the ability to carry on the company business over the centuries (Devigili, Cordero di Montezemolo, Zanni, 2010).

**Table 5: Breakdown of companies by year of foundation**

Foundation year	No. of companies	% Values
Less than 10 years	9	4.9%
10-25 years	41	22.1%
26-50 years old	44	23.8%
51-100 years	60	32.4%
Over 100 years	31	16.8%
<b>Total</b>	<b>185</b>	<b>100%</b>

### 4.1.2 Strategic orientation

In terms of strategic orientation, the first aspect that we wanted to verify was the *degree of sharing of the definition of sustainability* measured in terms of agreement/disagreement with the following three options (**table 6; figure 3**):

1. Environmental sustainability: “Corporate development must not in any case harm the environment and must do everything possible to reduce the consumption and waste of natural resources”.
2. Social sustainability: “Corporate development must in any case ensure the well-being of workers and develop human capital in the company and in the reference area”.

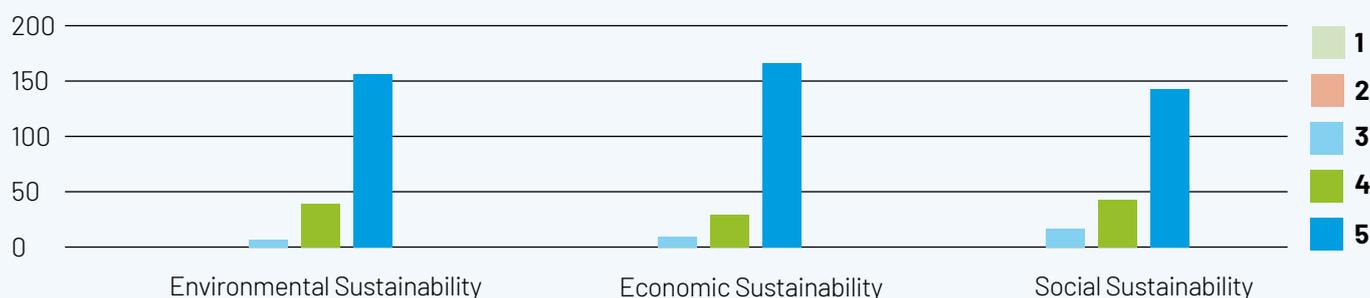
3. Economic sustainability: “Corporate development is guaranteed by creating value and ensuring a fair return to the various stakeholders”.

The differences in the answers between the three dimensions of sustainability indicated are minimal and it can be said that over 95% of the respondents identifies their company in the suggested definitions (values 4 or 5); social sustainability has slightly lower values, confirming that this concept is known but, depending on the survey perspectives, it can take on different meanings which can sometimes generate a certain confusion among entrepreneurs in the sector.

**Table 6: degree of sharing of three possible definitions of sustainability (1 = not at all; 5 = maximum)**

Definition of sustainability	Degree of agreement/disagreement				
	1	2	3	4	5
Environmental	0	0	2	31	152
Economic	0	0	4	24	157
Social	0	0	8	43	134

**Figure 3: sharing the possible definitions of the three dimensions of sustainability (1 = not at all; 5 = maximum)**



The role of social sustainability appears, at first glance, to be a key tool as the company’s development driver (table 7) with about two thirds of respondents declaring that they attribute

a high importance to this, 30% declares low importance and only a minority of respondents (2.7%) admits that they do not consider it among the company’s development drivers.

**Table 7: Degree of importance of social sustainability as a driver of corporate development**

Importance of social sustainability	None	Low	High	Total
Absolute Values	5	55	121	181
% Values	2,7%	30,5%	66,8%	100%

Wanting to investigate *which elements of sustainability assume greater importance* for the wineries interviewed, the answers begin to be much more differentiated (figure 4 and table 8). In particular, following a descending order by importance and by number of responses, we note that:

- The highest values in the answers provided are recorded for some levers of social sustainability that are subject to assessment (and sanction) by the competent bodies, in particular the issue of safety at work, the traceability of products in favour of consumers, the respect for and the safety of workers in the upstream supply chain.
- A second category of highly sensitive responses concerns aspects in which social and environmental sustainability overlap. We refer to the general respect for future generations, the defence of biodiversity, the reduction of CO2 emissions and to energy saving initiatives, the adoption of good agricultural practices and of communication on the substances used, the organic management of the vineyards; these are typical deve-

lopment drivers of environmental sustainability strategies which also take on social values as they safeguard the ecosystem and the community in which the company operates.

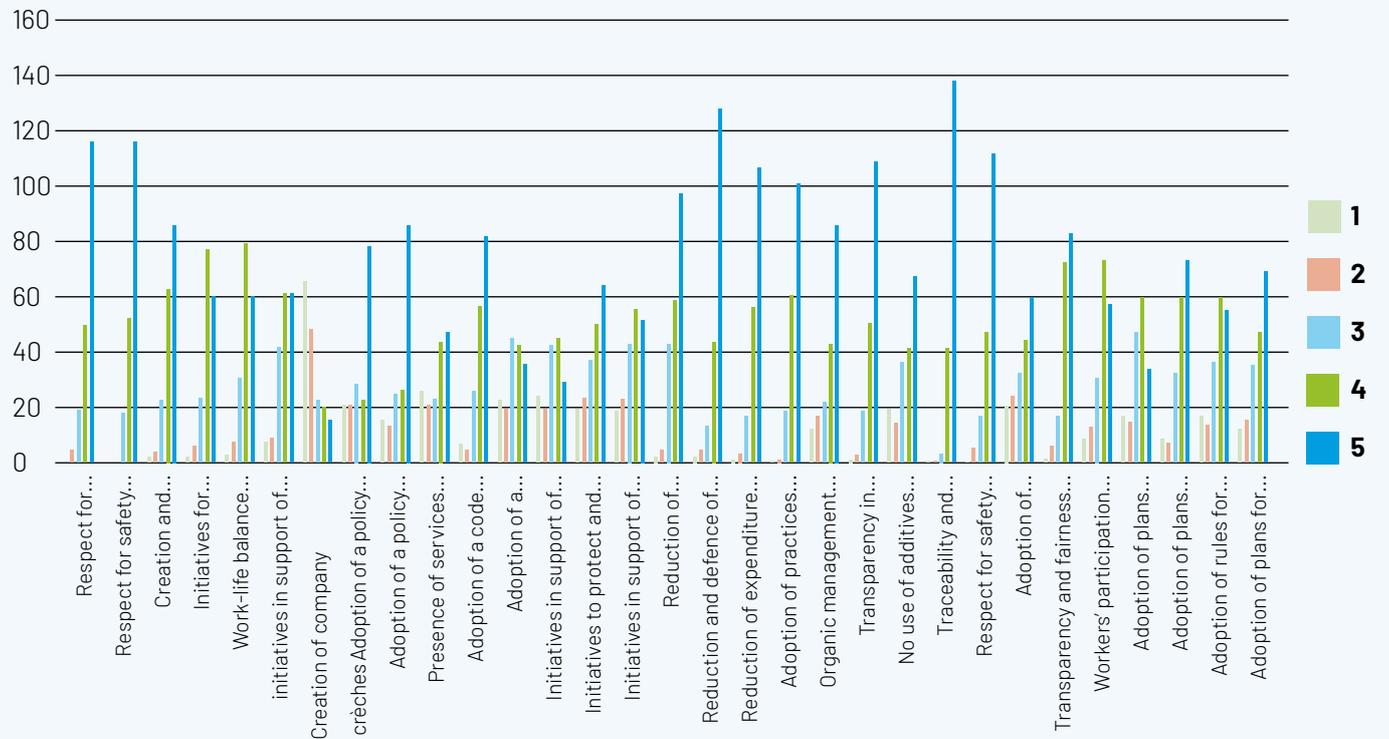
- A third category of responses concerns action levers that are more closely related to the world of work such as: the creation and safeguarding of employment levels, the adoption of anti-corruption policies, the introduction of ethical codes, transparency and fairness in the management of wage policies, the adoption of continuing education policies, workers’ participation in company decisions, the adoption of plans for respecting gender equality.
- In terms of importance, a further series of actions links the internal social dimension of the company to social issues which affect the entire Italian business system such as the youth issue, the gender and work-life balance problems, the policies to fight sexual harassment, support of art and culture, social initiatives to support the terri-

tory, initiatives to economically support migrants.

- This series closes with fewer responses, more precise initiatives, not always within the reach of individual small

businesses, such as the creation of company crèches, the adoption of “whistle blowing” instruments in the company, the adoption of corporate welfare plans.

**Figure 4: Degree of importance of the elements of sustainability for the creation of value (1 = none; 5 = maximum)**



**Table 8: Degree of importance of sustainability as a driver of business development (1 = none; 5 = maximum)**

<b>Elements of sustainability as a driver of business development</b>	<b>Average score</b>
Traceability and re-traceability of the wines produced	4.73
Reduction and defence of biodiversity in the countryside (soil and ecosystem)	4.59
Respect for the safety and well-being of workers in the company	4.51
Respect for future generations	4.48
Adoption of regenerative agricultural practices	4.45
Respect for the safety and well-being of workers along the upstream supply chain	4.45
Transparency in communication on the use of wine additives and adjuvants	4.44
Reduction of energy costs (electricity, water, gas, etc.)	4.43
Reduction of greenhouse gas emissions (CO <sub>2</sub> , etc.)	4.33
Creation and maintenance of employment levels	4.25
Transparency and fairness in the management of wage policies	4.24
Adoption of a code of ethics by the company	4.12
Initiatives for integrating young people in the labour market	4.00
Adoption of continuing and documented personnel training plans	3.98
Organic management of the vineyards	3.94
Adoption of an anti-corruption corporate policy	3.93
Initiatives for the protection and development of art and culture	3.93
Work-life balance initiatives for employees	3.87
Workers' participation in the company's strategic guidelines	3.86
initiatives in support of women's work	3.86
Adoption of plans for the respect of gender equality	3.80
Social support initiatives in the territory (families, immigrants, poor)	3.66
Adoption of rules for the presence of women among the management bodies of the company	3.66
No use of additives in the winemaking process	3.65
Adoption of a policy to fight sexual harassment in the workplace	3.63
Adoption of certifications relating to social sustainability in the company	3.52
Adoption of corporate welfare plans	3.42
Presence of toilets for women working in the fields	3.41
Adoption of a "whistle blowing" system in the company	3.26
Initiatives to economically support the work of migrants	3.23
Creation of company crèches	2.25

As the first consideration, we note that, in terms of ranking of sustainability indices, the “environmental” dimension still appears to be the prevailing one as regards the focus of the top management in the world of wine; certain social issues are perceived, but some important challenges (new governance structures, migrants, youth and women’s policies, social initiatives in the territory) seem to be less of a priority when creating corporate value. On one hand, this may depend on the structural problems of some wineries (especially smaller ones) which can feel unprepared to manage some important social changes on their own but, on the other, a possible “perception gap” also seems to emerge on the part of the world of wine towards some issues which are now particularly felt by the international community both from the perspective of demand (linked to the emergence of new “socially conscious” consumption models) and from that of ethical finance (which pays particular attention to some of these indicators).

We then tried to assess what contribution “social sustainability” could give to the improvement of some economic

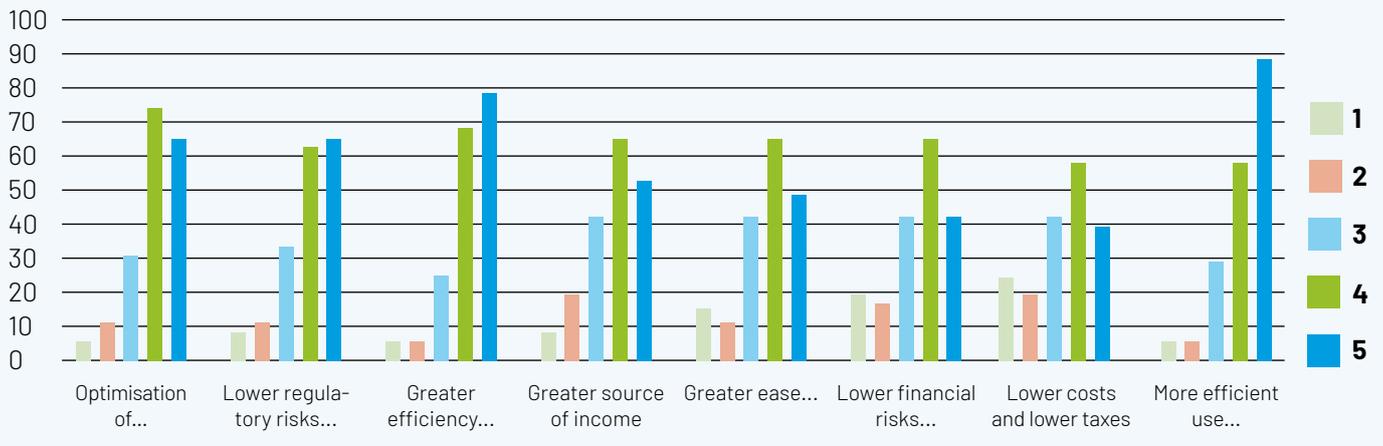
aspects for the wineries interviewed and from the answers provided it emerges that (figure 5 and table 9):

- The prevailing motivation seems to be that of operational efficiency and use of resources, i.e. the actions taken seem to act above all on the aspect of corporate costs.
- Compliance reasons follow, both in terms of supply chain optimisation and of lower legal risks.
- Social sustainability, on the other hand, still seems to be an instrument that is not entirely capable of supporting supply differentiation strategies through marketing strategies capable of generating greater revenues (unlike environmental sustainability which over time has proved capable of responding to new consumer needs).
- Finally, at the moment social sustainability does not seem to be perceived as an instrument capable of reducing financial risks and of reducing financial and fiscal costs for wineries, despite the growing interest of some credit institutions in favour of benefit corporations.

**Table 9: Type of contribution offered by sustainability to generating economic value for the company (1 = no contribution; 5 = maximum contribution)**

<b>Contribution offered by social sustainability to some economic aspects of the company</b>	<b>Average score</b>
More efficient use of resources	4.17
Greater operational efficiency	4.14
Optimisation of the supply chain	3.99
Lower regulatory and/or legal risks	3.95
Greater source of income	3.74
Easier access to funding sources	3.62
Lower financial and/or operational risks	3.51
Lower costs and lower taxes	3.36

**Figure 5: Contribution of social sustainability to improving economic aspects (1 = none; 5 = maximum)**



We tried to analyse in depth the possible contribution offered by “social sustainability” to improving the ability to differentiate the company’s products/brands, noting that for the wineries interviewed (figure 6 and table 10):

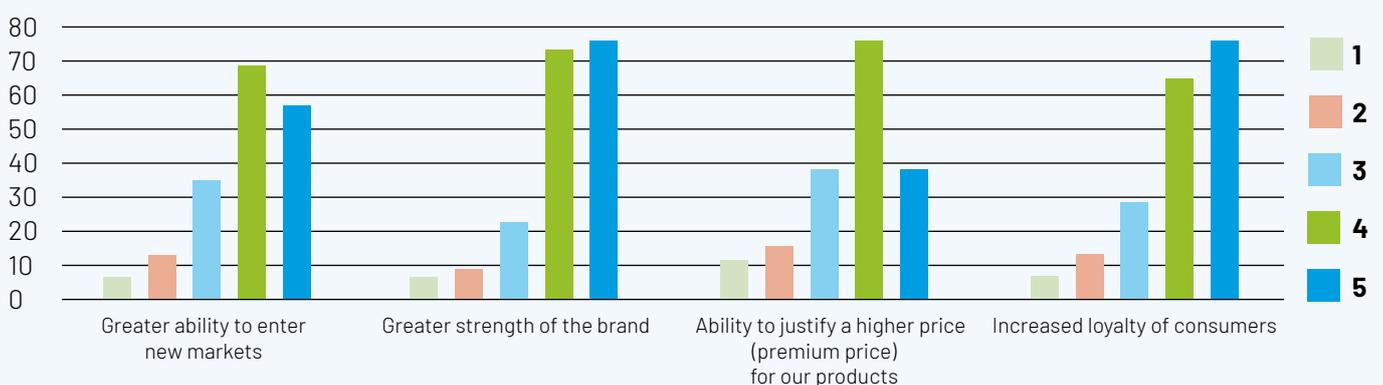
- social sustainability appears principally to be an instrument for strengthening the brand and building customer loyalty;

- it can then be a lever to enter some markets that are more sensitive to this issue (both as new geographic markets and as new distribution channels),
- while it still does not seem able to support higher pricing strategies for the company’s products aimed at a specific target clientele.

**Table 10: Contribution of social sustainability to improving the ability to differentiate products (1 = none; 5 = maximum)**

Contribution of social sustainability to differentiation strategies	Average score
Greater brand strength	4.10
Increased consumer loyalty	4.02
Greater ability to enter new markets	3.85
Ability to justify a higher price (premium price)	3.64

**Figure 6: Contribution of social sustainability to improving the ability to differentiate products (1 = none; 5 = maximum)**



Still in terms of marketing policies, we have tried to assess whether the commitment to social sustainability was supported by adequate communication strategies *addressed to some company interlocutors*, noting that (Figure 7 and Table 11):

- the communication activity mainly concerns the downstream supply chain (customers and distributors);

- followed by the media, considered players who in any case can act on the final customer;
- less attention is paid to other institutional partners and suppliers (i.e. the links in the upstream chain).

**Table 11: Degree of communication of the commitment to social sustainability towards the interlocutors of the company (1 = none; 5 = maximum)**

### Communication activities of the commitment

to social sustainability towards the interlocutors of the company	Average score
Customers	4.13
Distributors	3.95
Media	3.63
Other partners (consortia, trade associations, etc.)	3.49
Institutions/Local Authorities	3.41
Suppliers	3.36

**Figure 7: Degree of communication of the commitment to social sustainability towards the interlocutors of the company (1 = none; 5 = maximum)**



Moving from a simple orientation towards social sustainability to a concrete commitment to support it with adequate resources and strategies, the companies interviewed were asked in which areas and with what degree of intensity they intended to make investments over the next three years and found that (figure 8 and table 12):

- the greatest effort seems to be aimed at supporting environmental sustainability policies or traditional territorial promotion policies, in which social sustainability appears

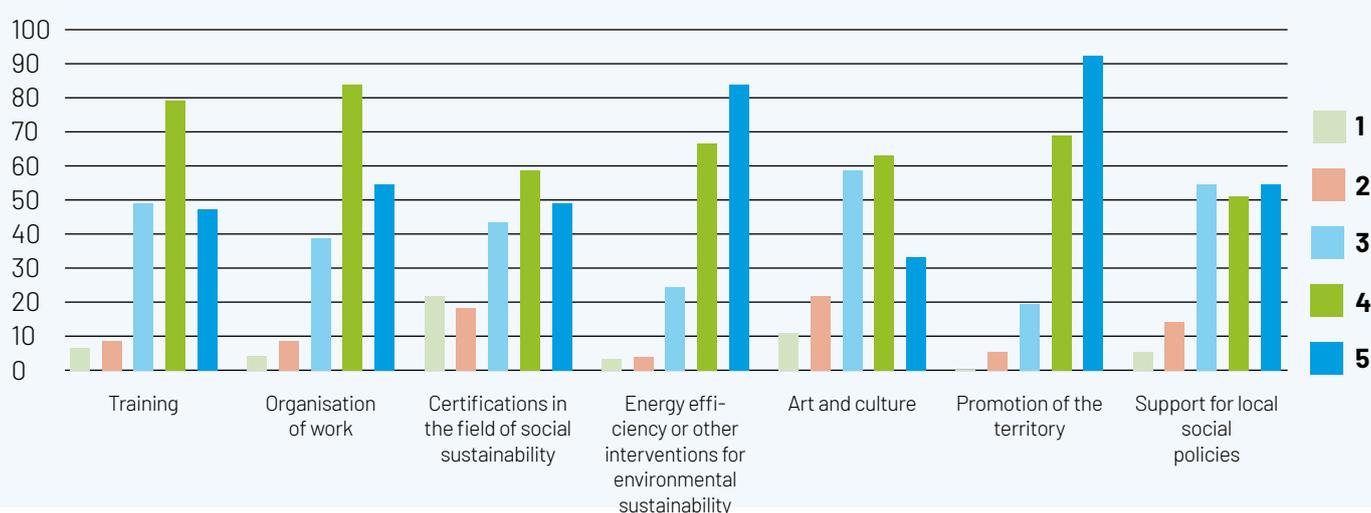
to be an ancillary effect;

- this is followed by more targeted investments to improve work organisation, employee training or to support social policies in their home territory;
- less attention is paid to certification policies in the social field (which still, according to the respondents, do not seem able to tailor the offer) and to actions in support of art and culture.

**Table 12: Degree of investment in social sustainability over the next three years (1 = no investment; 5 = maximum investment)**

Areas of investment in social sustainability over the next three years	Average score
Promotion of the territory	4.32
Energy efficiency or other interventions for environmental sustainability	4.25
Work organisation	3.97
Training	3.85
Support for local social policies	3.74
Certifications in the field of social sustainability	3.51
Art and culture	3.50

**Figure 8: Degree of investment over the next three years (1 = none; 5 = maximum)**

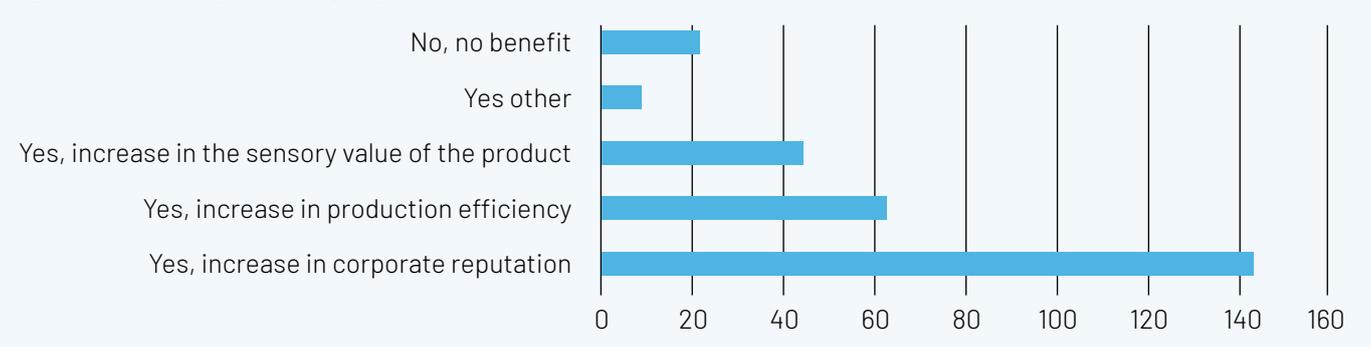


In order to investigate which elements can *favour or hinder the certification strategies of social sustainability* we asked the companies (figure 9 and figure 10):

- what advantages they believed could be provided by the adoption of a certification system mainly attribu-

- table to reputational factors or operational efficiency;
- what obstacles delayed the adoption of social certification systems mainly attributable to organisational implementation difficulties and cost problems

**Figure 9: Advantages in adopting social sustainability certifications**



**Figure 10: Obstacles to the adoption of social sustainability certifications**



**4.1.3 Supply chain relations and relations with the territory**

The second section of the questionnaire submitted concerned elements of social sustainability which could affect supply chain relations and relations with the territory.

The first question to be answered concerned the degree of knowledge and of monitoring of some aspects of social sustainability along the entire production chain (upstream and downstream) (table 13 and figure 11). Seemingly, the companies interviewed declared a good level of knowledge and of monitoring of the upstream and downstream supply chain,

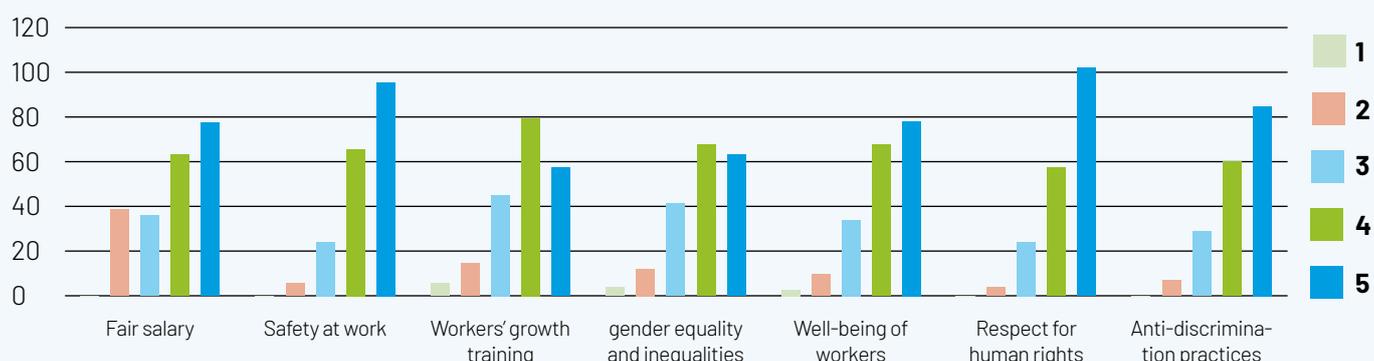
probably because past scandals and potential legal and image risks have sensitised the wine world to these issues. In order of importance, the greatest awareness was:

- towards the respect for human rights and working conditions (collective agreements) and the issue of safety;
- followed by attention towards anti-discrimination practices and wage conditions;
- lower levels of priority are attributed to training and gender equality aspects

**Table 13: level of knowledge and of monitoring of social sustainability along the supply chain (from 1 = none to 5 = highest degree)**

Social sustainability factors monitored along the supply chain	Average score
Respect for human rights (employment of minors, collective Agreements)	4.40
Safety at work	4.36
Anti-discrimination practices	4.25
Fair salary for employees	4.13
Well-being of workers	4.12
Gender equality and inequalities	3.96
Workers' growth training	3.96

**Figure 11: Degree of knowledge and of monitoring of the aspects of the supply chain (1 = none; 5 = maximum)**



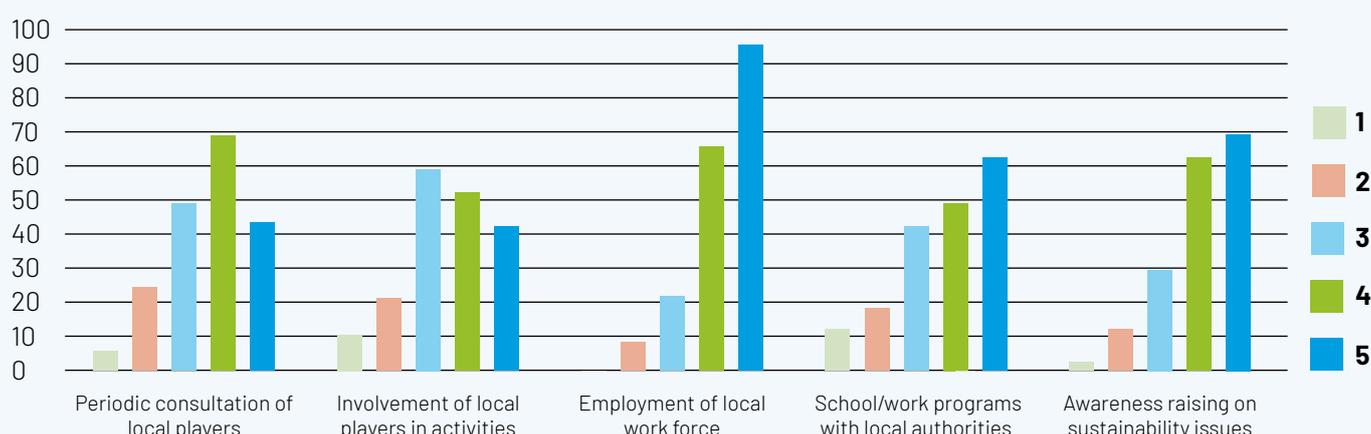
A second element of interest refers to the company's *degree of attention towards certain relation factors with the territory and the local community* in order to improve coexistence relationships (table 14 and figure 12). Monitoring these potential actions is important for wineries also for the purposes of a possible certification of social sustainability as they are considered good operational practices to reconcile the development of the company with that of the local context in which it operates (see for example the Equalitas Standard). In decreasing order of importance, we note that:

- the two factors to which the greatest attention is paid are the recruitment of local workforce and the awareness of sustainability issues (here understood in a broad sense, that is, both social and environmental);
- followed by the involvement in training activities with local players in collaboration with local institutions;
- finally, in order of priority, the periodic consultation with local players and their involvement in company activities (i.e. social networking and consultation actions).

**Table 14: Degree of attention towards factors relating to the territory (1 = none; 5 = maximum)**

Relationship factors/Type of actions	Average score
Employment of local workforce	4.37
Awareness raising on sustainability issues	4.12
School/work programs with local institutions	3.72
Periodic consultation of local players	3.66
Involvement of local players in the activities	3.51

**Figure 12: Importance of factors relating to the territory (1 = none; 5 = maximum)**



#### 4.1.4 Company performance

With reference to company performance, we have tried to assess what impact the Covid 19 pandemic may have had on two indicators:

- turnover (potential indicator of economic sustainability);
- green investments (environmental sustainability indicators).

The impact on economic sustainability of the Covid-19 pandemic confirms a differentiated landscape which does not depend only on sectorial elements, but that also mirrors corporate and strategy factors (for example the incidence of sales in the Ho.Re.Ca channel or the ability to sell online).

In particular, the change in turnover that occurred in 2020 and the one forecast for 2021 (table 15 and figure 13) indicate:

- that more than 50% of respondents saw the volume of their business reduced in 2020, some companies even considerably (reductions of more than 20%); this negative impact is estimated to be largely reabsorbed in 2021, although for a core of companies the turnover reduction

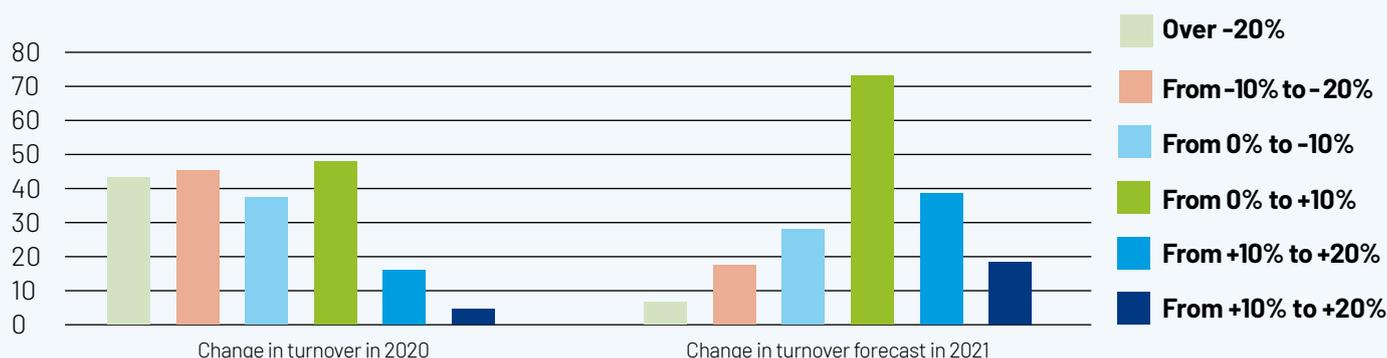
should also occur in the current year;

- a group of companies seems to have reacted proactively to the change in the scenario, seeing their turnover grow in 2020 even during the period of the pandemic; this group is more numerous in 2021 (about 70% of respondents) and expects a “rebound” in its turnover.

**Table 15: Change in turnover of companies in the years 2020 (actual) and 2021 (forecast)**

YEAR	% Change in turnover					
	Over -20%	From -10% to -20%	From 0% to -10%	From 0% to +10%	From +10% to +20%	Over +20%
Turnover 2020	41	43	37	46	11	1
Turnover 2021 (estimate)	6	17	28	71	39	17

**Figure 13: Change in turnover of companies in the years 2020 (actual) and 2021 (forecast)**



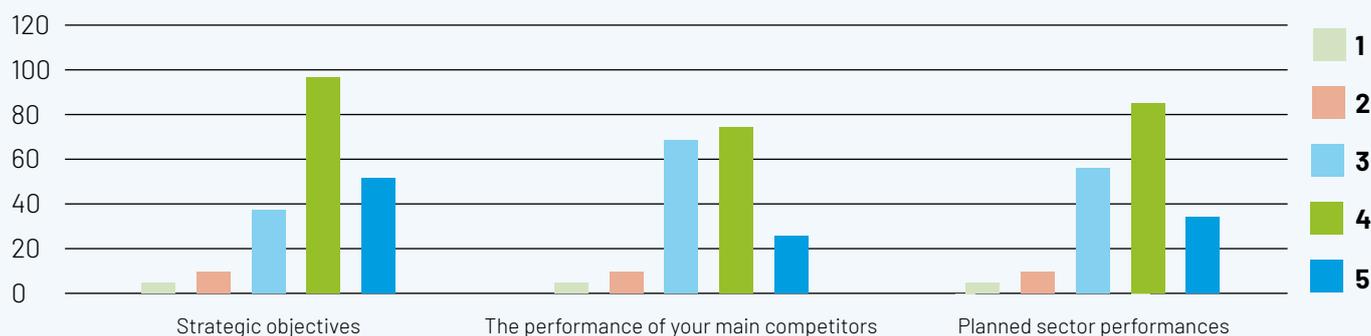
Respondents were then asked about their *degree of satisfaction with the overall performance of the company in the three-year period 2017-2019* (where 1 = no satisfaction, 5 = maximum satisfaction), i.e. in the period prior to Covid-19 (table 16 and figure 14). We note that in general the companies interviewed reported a good level of satisfaction with the company performance measured in terms of pre-set internal strategic objectives; slightly lower values, but still

satisfactory in any case, concern the external dimension of company competitiveness (sector dynamics, direct competitors). This indicates that only a small number of companies reported dissatisfaction with their performance before the pandemic and therefore the drops in turnover recorded in 2020 seem to be the result of an unexpected exogenous event that hopefully can be overcome within two years.

**Table 16: Degree of satisfaction with the performance of the three-year period 2017-2019 (1 = none; 5 = maximum)**

Performance indicators	Average score
Planned strategic objectives	4.03
Sector performance	3.79
The performance of your main competitors	3.59

**Figure 14: Degree of satisfaction with the performance of the three-year period 2017-2019 (1 = none; 5 = maximum)**



A further element that we were interested in measuring was whether the Covid-19 pandemic had interrupted the efforts of companies to build *ecologically sustainable business models* (table 17). More specifically, the responses provided indicate that:

- over the 2015-2020 period, most of the companies interviewed (over 90%) continued to invest in environmental sustainability, confirming the growing attention towards green strategies which had already emerged clearly from

- the surveys carried out previously (see Zanni, Pucci, 2014);
- despite the difficult context conditioned by the health emergency, more than two thirds of companies confirm an increasing level of green investments, i.e. the efforts towards environmental sustainability do not seem to slow down, but rather continue, albeit in the presence of an unfavourable economic situation (only 1% signals a decrease).

**Table 17: investments in environmental sustainability in the 2015-2020 period**

Investments in the five-year period 2015-2020	YES	NO	Total	% Values
	172	13	184	100%
Of which				
Increased	136	-	-	78,6%
Remained stable	36	-	-	20,8%
Decreased	1	-	-	0,6%

#### 4.1.5 Work and organisation

In order to verify the real and constant orientation towards social sustainability by referring to some concrete actions inherent to work and company organisation, companies were asked to indicate whether in 2020 they had adopted consistent *management organisational instruments* (table 18 and figure 15). The responses indicate:

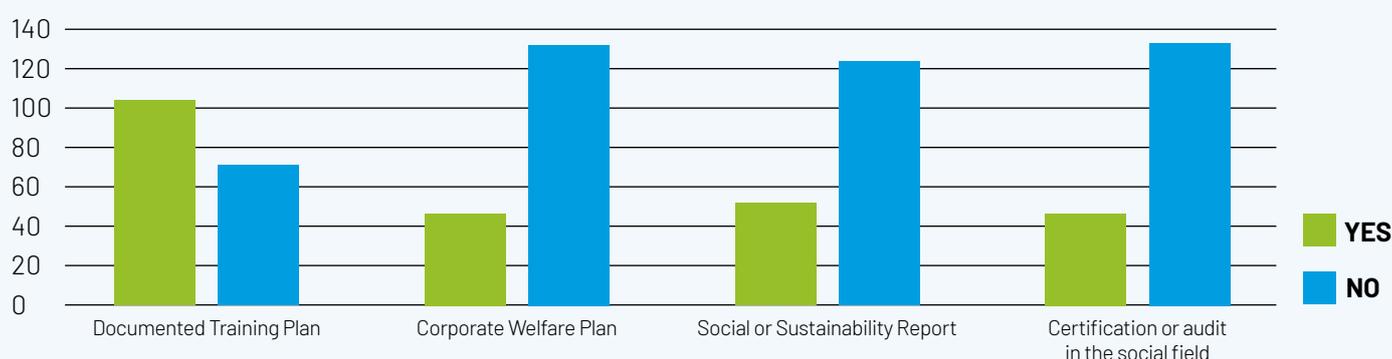
- a greater effort in terms of personnel training (reported

- by over 50% of the sample of companies interviewed);
- a first sign of the adoption of mechanisms that in the future will allow certifying and formally evaluating the efforts made towards social sustainability, as well as implementing corporate welfare plans (actions reported by about 20-25% of the companies in the analysed sample).

**Table 18: adoption in 2020 of organisational and management actions/instruments (% relative incidence)**

Organisational/management instruments	YES	NO
Documented Training Plan	101 (57.3%)	75 (42.7%)
Corporate Welfare Plan	42 (24.6%)	129 (75.4%)
Social or Sustainability Report	49 (28.5%)	123 (71.5%)
Certification or audit in the Social field	45 (25.6%)	131 (74.4%)

**Figure 15: Adoption of management organisational instruments in 2020**



Another element of interest concerned *the employment impact connected to the Covid-19 pandemic*, to verify whether there had been significant changes in the workforce in the face of the even significant decreases in turnover that had affected some companies (table 19, figure 16). The responses provided indicate that:

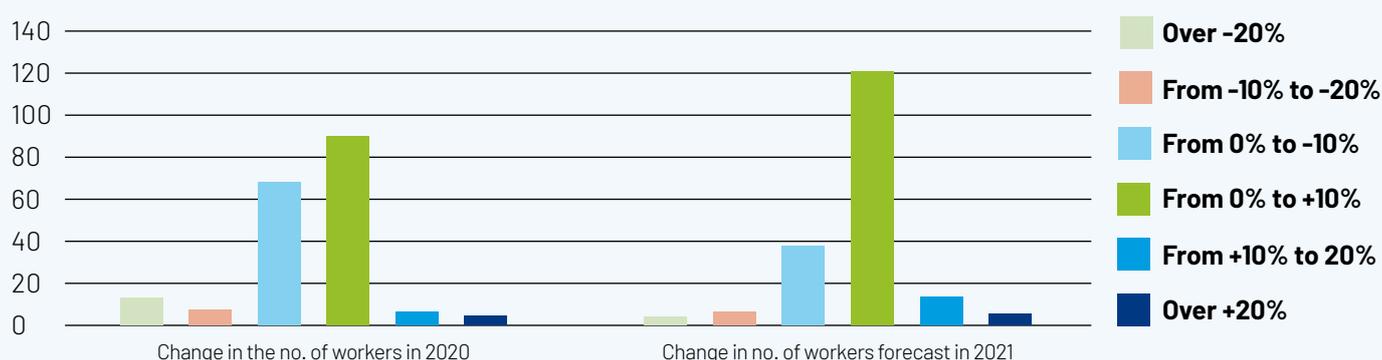
- only a small part of the companies offloaded the effects of the drop in turnover onto the workers (with a reduction in the workforce of more than 10% in a sector still characterised by the contribution of seasonal workers) in line with the declared objective of safeguarding levels of occupation which are part of the company's orienta-

tion towards social sustainability. This is also due to the presence of institutional measures that prevented the dismissals, including of seasonal workers, during the most acute phase of the pandemic crisis;

- most companies report a stability in the number of employees;
- some companies indicate an increase in the workforce as early as 2020, with greater intensity in 2021. If these hypotheses were to materialise, it would seem that the employment effects in the world of wine were not significant and that the decline in employees due to the pandemic should be reabsorbed by 2021.

**Table 19: Change in the number of company workers in the years 2020 (actual) and 2021 (forecast) (% relative incidence)**

Year	Change in % in the number of workers					
	Over -20%	From -10% to -20%	From 0% to -10%	From 0% to +10%	From +10% to +20%	Over +20%
2020	7 (4%)	6 (3.4%)	66 (37.7%)	89 (50.9%)	6 (3.4%)	1 (0.6%)
2021 (estimate)	1 (0.6%)	3 (1.8%)	37 (21.3%)	120 (69%)	10 (5.7%)	3 (1.8%)

**Figure 16: Change in the number of company workers in the years 2020 (actual) and 2021 (forecast)**


A potential stop on the implementation of possible actions in favour of workers can be linked to cost factors and to knowledge of the legislation, therefore we tried to verify whether the wineries interviewed *knew about and had benefited from work incentives over the last three years* (table 20, figure 17). The responses provided indicate that:

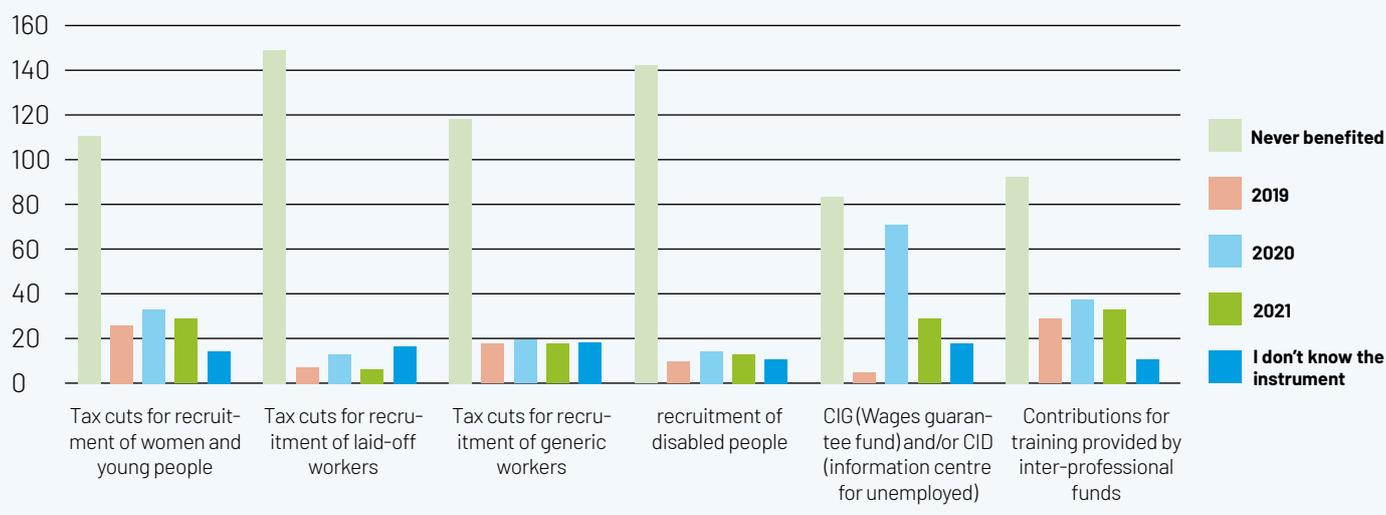
- the most used instrument was the redundancy fund (CIG and/or CID), particularly in 2020 from the outbreak of the pandemic crisis; over a third of the analysed sample made use of it, confirming the usefulness of this instrument to mitigate the social effects of the crisis that appears to be decreasing in 2021;
- the contributions disbursed for training by the inter-professional funds follow in order of importance. In any case, these consistently involve less than 20% of the sample over the three-year period despite being known;

- the various tax cuts for hiring particular categories of employees (women, young people, disabled persons, workers collecting unemployment benefits, generic workers) have lower rates of use, although they are generally also known to entrepreneurs;
- the high rate of non-use of these work incentive instruments (in some cases more than
- $\frac{3}{4}$  of the sample declares that it has never benefited from it) highlights possible critical issues in the dispensing mechanisms or in the onerousness of the procedures by the wineries. These incentives, in fact, are normally known to over 90% of respondents, but are probably not used due to the complexity of the procedures or to the excess of regulatory constraints contained therein. We also note that this behaviour is constant and does not seem to change over the three-year period in question.

**Table 20: Use and knowledge of employment incentives in the years 2019-2020 (actual) and 2021 (forecast)**

Employment incentive instruments	Degree of use and knowledge				
	Never benefited	2019	2020	2021	I don't know the instrument
Tax cuts for recruitment of women and young people	111	24	29	23	11
Tax cuts for recruitment of laid-off workers	140	4	7	3	16
Tax cuts for recruitment of generic workers	115	17	21	17	17
Tax cuts for recruitment of disabled people	139	9	13	11	11
CIG (Wages guarantee fund) and/or CID (information centre for unemployed)	81	5	65	27	17
Contributions for training provided by inter-professional funds	105	27	36	31	13

**Figure 17: Use and knowledge of employment incentives in the years 2019-2020 (actual) and 2021 (forecast)**



A further level of interest concerns the option of outsourcing company activities which can determine effects on workers' conditions, especially in the presence of weak controls on the supply chain. The use of external players in the world of wine is probably due to the fact that having third parties carry out certain activities may be useful both operationally and economically for some companies; something that, in terms of sustainability, does not prevent a priori that the entire wine supply chain can ensure adequate standards of control both from the point of view of wages and of workers' safety and well-being.

In particular, the companies were asked to indicate whether they had contracted to third parties, with reference to the annual average of the 2017-2019 three-year period, field

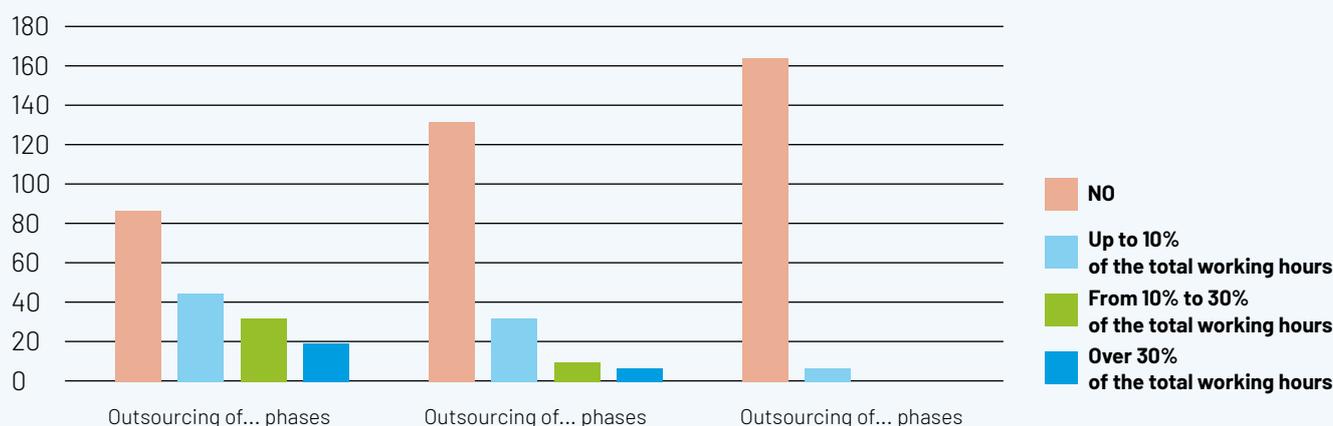
work or cellar-bottling and with what intensity in relation to the total hours of work carried out in the sectors (table 21, figure 18). Based on the responses provided, we note that:

- the most outsourced processing phase concerns work in the fields (involving about half of the sample analysed), followed in order of priority by the bottling phase; agritourism activities have minimal levels of outsourcing.
- In general, the companies interviewed use it to a reduced extent (up to 10%) of the total working hours.
- A core of companies, respectively 17% and 10% of the interviewed sample, nevertheless shows average (between 10-30% of the total hours worked) or high rates of outsourcing of work in the fields (above 30% of the total working hours).

**Table 21: Degree of outsourcing of company activities**

Type of business outsourcing	Degree of intensity in % of the total working hours			
	NO	Up to 10%	From 10% to 30%	Over 30%
Outsourcing of field work phases	84	41	31	18
Outsourcing of cellar-bottling work phases	123	33	9	5
Outsourcing of agritourism work phases	156	8	0	0

**Figure 18: Amount of total working hours contracted to third parties in the three-year period 2017-2019 (average)**



In order to verify the use of welfare instruments, companies were asked whether *at least one worker employed by the company had benefited from one of the following public welfare instruments* in the three-year period 2019-2021 (table 22, figure 19). In this regard it was observed that:

- of all the most used public welfare instruments, those concerning training are the best known and used (the peak of use in the three-year period was 2020, which affected about a quarter of the interviewed companies in

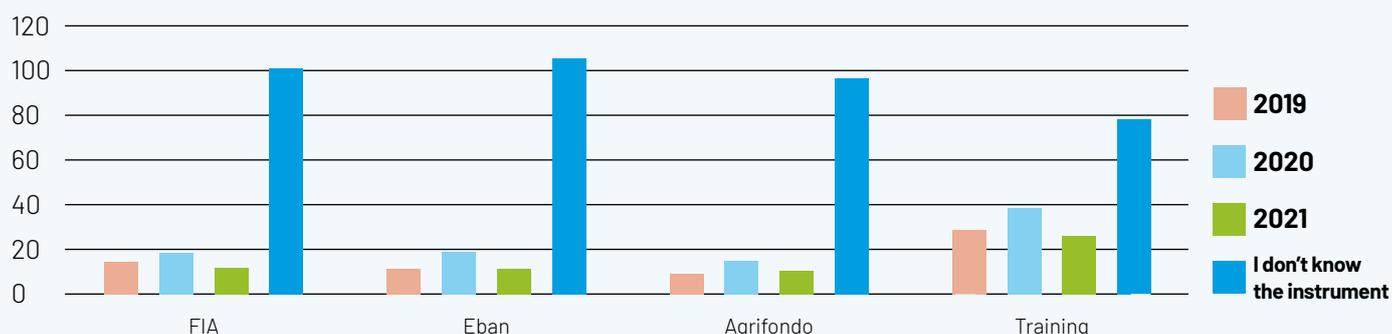
the sample);

- unlike employment incentives, which are largely known, the public welfare instruments available to companies seem little known, highlighting the presence of cultural gaps (of entrepreneurs, consultants or the network of support services) and suggesting the usefulness of institutional communication aimed at wine entrepreneurs (over 40% of entrepreneurs does not know these with peaks reaching 60% for some instruments).

**Table 22: At least one worker employed by the company benefited from one of the following public welfare instruments in the three-year period 2019-2021**

Welfare instrument	2019	2020	2021	I don't know the instrument
FIA	15	18	12	103
Eban	11	18	10	104
Agrifondo	9	14	9	99
Training	30	43	28	77

**Figure 19: At least one worker employed by the company benefited from one of the following public welfare instruments in the three-year period 2019-2021**



Finally, respondents were asked if they could provide information concerning the *presence of trade union representation within the company* (table 23 and figure 20). Net of the non-responses, we note that:

- Over 60% of respondents declared the absence of employees registered with a trade union, a percentage that rises to 75% if we consider the presence of a Unitary

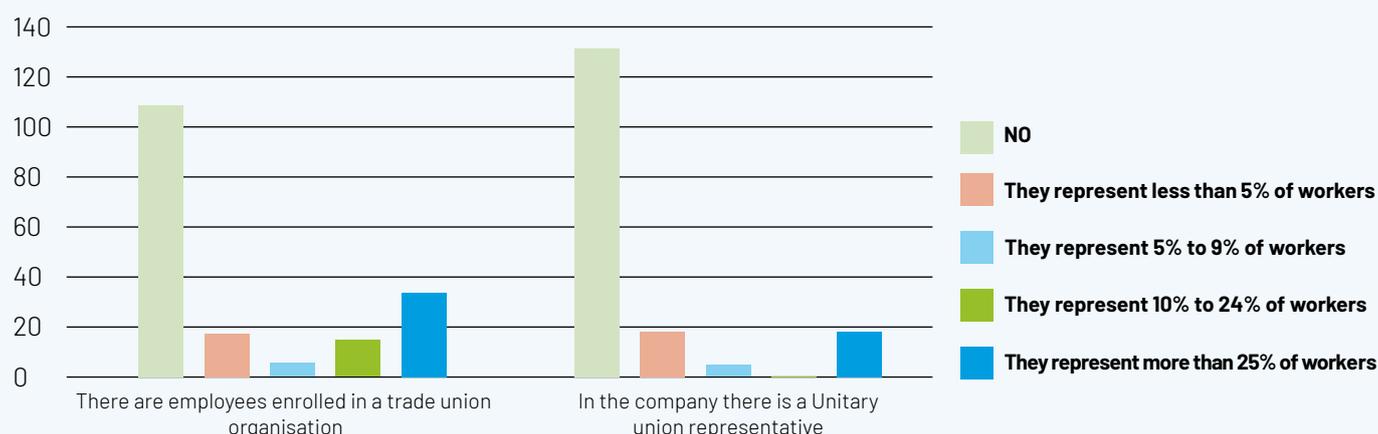
union representative body.

- The figure reflects the prevalence of micro and small enterprises and the peculiarities of the agricultural world; however, there is a core of wineries that has a greater presence of union members (almost 20% of workers), probably the larger ones.

**Table 23: Presence of union representation within the company**

Type of trade union representation	Degree of trade union representation (in % of workers)				
	NO	Less than 5%	From 5% to 9%	From 10% to 24%	Over 25%
Employees registered with a trade union organisation	101	13	5	14	32
There is a Unitary union representative body within the company	126	16	0	0	16

**Figure 20: Trade union representation within the company**



### 4.2 First results emerging from a statistical analysis by “main components”

One of the research questions that arose upstream of submitting the questionnaire concerned the definition of the dimension of social sustainability within the wine supply chain sector, and the necessary in-depth analysis of what are the “social” variables to be taken into consideration in relation to the companies’ strategic orientation. To answer the question, the survey presented 31 indicators of social and socio-environmental sustainability to respondents, for which they had to provide a degree of agreement or disagreement (5-point *likert* scale) regarding the orientation to-

wards sustainability of their own company and which have been analytically listed in table 8.

In addition to giving an overview of the orientation of companies, the collection of data on the 31 variables was used to determine common factors which led, through the development of a factorial model validated with adequacy and significance tests, to the identification of 5 groups or clusters of variables valid as general indicators of social and socio-environmental sustainability in the wine sector. The 5 groups were formed by aggregating the factors that showed significant commonality between them, and were named:

<sup>5</sup> KMO test equal to 0.929 (with values > 0.7 the model can be considered adequate) and Bartlett’s sphericity test with significance 0.000 (valid for values < 0.05).

- **Work** (variables 1, 2, 3, 4, 5, 9, 11, 23, 24, 26, 29)

**1.** Respect for future generations; **2.** Respect for the safety and well-being of workers in the company; **3.** Creation and maintenance of employment levels; **4.** Initiatives for integrating young people in the labour market; **5.** Work-life balance initiatives for employees; **9.** Adoption of an anti-corruption corporate policy; **11.** Adoption of a code of ethics by the company; **23.** Traceability and re-traceability of the wines produced; **24.** Respect for the safety and well-being of workers along the supply chain upstream of the product; **26.** Transparency and fairness in the management of wage policies; **29.** Adoption of continuing and documented personnel training plans;

- **Gender** (variables 6, 7, 8, 10, 28, 30, 31)

**6.** Initiatives to support women's work; **7.** Creation of company crèches; **8.** Adoption of a policy to fight sexual harassment in the workplace; **10.** Presence of toilets for women working in the fields; **11.** Adoption of a code of ethics by the company; **28.** Adoption of corporate welfare plans; **30.** Adoption of rules for the presence of women among the management bodies of the company; **31.** Adoption of plans for the respect of gender equality.

- **Territory** (variables 12, 13, 14, 15, 25)

**12.** Adoption of a "whistle blowing" system in the company; **13.** Initiatives to economically support the work of migrants; **14.** Initiatives for the protection and development of art and culture; **15.** Social support initiatives in the territory (families, immigrants, poor); **25.** Adoption of certifications relating to social sustainability in the company;

- **Environment** (variables 16, 17, 18, 19, 20)

**16.** Reduction of greenhouse gas emissions (CO<sub>2</sub>, etc.); **17.** Respect and defence of biodiversity in the countryside (soil and ecosystem); **18.** Reduction of energy costs (electricity, water, gas, etc.); **19.** Adoption of regenerative agricultural practices; **20.** Organic management of the vineyards.

- **Process** (variables 21, 22, 27)

**21.** Transparency in communication on the use of wine additives and adjuvants; **22.** No use of additives in the winemaking process; **27.** Workers' participation in the company's strategic guidelines.

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As you can see, the aggregation of components has led to defining groups whose boundaries are sometimes weak, but this is useful for a fairly clear overview of which macro-areas we operate in. In particular, it is interesting to note that the canonical classifications of the literature previously reviewed (§ 2), based mostly on work-related components (e.g. fair wages, welfare for workers, safety at work), require the integration of "social" variables which are often associated with the issue of work, such as gender equality and taking care of supply chain relations and of relations with the territory. At the same time, as already emerged from the interpretation of the descriptive statistics, the analysis of these main components suggests that the clusters of the variables concerning work and the environment still weigh much more than for the other groups (gender, territory, process).

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Having established the main components among the social sustainability variables, we then proceeded to measure the correlation and association of these social sustainability components with the variables of interest relating to age, size in terms of employees and company performance.

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In the first elaboration, the age variable of the company was given in classes from 1 to 5, where 1 indicates companies with less than 10 years of activity, 2 = between 10 and 25 years, 3 = between 26 to 50 years, 4 = between 51 and 100 years; and 5 = over 100 years.

**Table 24: Correlation between orientation towards social sustainability and the age of the company**

Variable	Variable2	Correlation	Count	Statistic		Notes
				Lower C.I.	Upper C.I.	
Work	Age class of the company	,088	185	-,057	,229	
Gender	Age class of the company	,099	185	-,046	,240	
Territory	Age class of the company	,027	185	-,118	,170	
Environment	Age class of the company	-,074	185	-,216	,071	
Process	Age class of the company	-,093	185	-,234	,052	

Missing value handling: PAIRWISE, EXCLUDE. C.I. Level: 95.0

In **table 24** we can see there is a *positive correlation between the age of the company and sensitivity on the social issues of work and on the issue of women*; on the contrary, it is interesting to note that more mature companies are less involved in environmental issues and process techniques than younger companies, the latter probably more flexible in terms of adopting innovations and of updating their business model than the former, which perhaps are more faithful to the production “traditions” inherited from the past.

In order to construct the second correlation, the company size class was defined with reference to the number of workers, identifying those belonging to one of the three distinct

groups composed of less than 9 workers (micro-enterprise), from 10 to 49 employees (small-medium enterprise), or from 50 to 249 employees (medium-sized enterprise). The two large companies (over 250 employees) present in the database, already under study (section 4.1), were not analysed in this elaboration as they are *outliers* (values significantly distant from the central trend measurements). The results of the test (**table 25**) show how the association between orientation towards social sustainability and the size of the company is not very significant for issues strictly related to work and the environmental dimension, while it takes on a positive number for external relations with their home territory.

**Table 25: Correlation between orientation towards social sustainability and the size of the company in terms of employees**

Variable	Variable2	Correlation	Count	Statistic		Notes
				Lower C.I.	Upper C.I.	
Work	Company size	-,089	63	-,330	,162	
Gender	Company size	-,175	63	-,405	,076	
Territory	Company size	,166	63	-,086	,397	
Environment	Company size	-,237	63	-,458	,011	
Process	Company size	-,147	63	-,381	,105	

Missing value handling: PAIRWISE, EXCLUDE. C.I. Level: 95.0

Finally, to test the third relationship between orientation towards social sustainability and classes of turnover, we divided it into 8 different and increasing classes of turnover depending on the economic results reported by the company. The classes identified were: **a)** up to 250.000 €; **b)**

from 250.000 to 500.000 €; **c)** from 500.000 to 1.000.000 €; **d)** from 1.000.000 to 2.000.000 €; **e)** from 2.000.000 to 5.000.000 €; **f)** from 5.000.000 to 10.000.000 €; **g)** from 10.000.000 to 50.000.000 €; **h)** from 50.000.000 to 250.000.000 €.

Similarly to what was recorded in the previous analysis (after all, the strong correlation between the number of employees and the class of turnover in wineries is known), the results (table 26) did not give strong indications, except that company performance seems to be more associated with a

positive orientation towards issues of social sustainability in work, while relations with other factors concerning environmental dimension, process techniques and the issue of women remain negative or slightly negative.

**Table 26: Correlation between orientation towards social sustainability and company turnover**

Variable	Variable2	Correlation	Count	Statistic		Notes
				Lower C.I.	Upper C.I.	
Work	Turnover	,038	60	-,218	,289	
Gender	Turnover	-,087	60	-,333	,171	
Territory	Turnover	,156	60	-,102	,394	
Environment	Turnover	-,271	60	-,491	-,018	
Process	Turnover	-,249	60	-,473	,005	

Missing value handling: PAIRWISE, EXCLUDE. C.I. Level: 95.0

The relationship between the components of the orientation towards social sustainability and company performance effectively demonstrates the existence of a relationship but does not explain a possible cause-and-effect relationship. In this sense, it is necessary to note that a second statistical investigation proves the existence of a close association of data between the change in turnover of companies in 2020 (actual) and in 2021 (forecast) and each of the 5 components of the strategic orientation: those who are more inclined to take into consideration social sustainability and to invest

in this sense have also shown greater resilience in going through the period of crisis due to the pandemic. Therefore, even if the available data do not provide a certain answer on cause-effect relationships and it is not possible to exclude a priori that this may be a coincidence (spurious relationship), this empirical evidence may be of interest to incentivise companies to act concretely, going beyond intentions and expressions of interest, and to increase their investments in social sustainability.

### 4.3 The role of sustainability certifications and of quality awards

Finally, an attempt was made to observe possible correlations of the orientation towards social sustainability with respect to two other indicators:

- the presence of a formal sustainability certification having as reference the Equalitas Standard, not just in terms of "technical compliance" but also with other be-

havioural and performance variables;

- the number of awards and acknowledgments received, or the presence of quality opinions recognised as authoritative in the wine sector, in particular we took into account the judgments of production excellence "I tre Bicchieri" for the wine in the Gambero Rosso guide obtained in the last twenty years.

### 4.3.1 The role of the Equalitas sustainability certification

Certifications in the field of sustainability, and specifically those of social sustainability, have already been the subject of a first analysis in § 4.1.2, where it emerged that many wineries still pay little attention to them. Despite some reputational advantages being evident even to respondents, this lack of consideration is motivated by the perception that the companies have regarding the high costs to be incurred to obtain the certifications and to their significant organisational impact. In this survey we therefore tried to verify whether having obtained a standard as a sustainable company, in this case the Equalitas certification as a sustainable organisation, can be considered a noteworthy parameter in terms not only of a company's greater orientation towards sustainability, as would be hoped for, but also as regards its own labour policies and the resilience to crises. The Equalitas certified companies in our sample are 22, i.e. 12% of the sample investigated.

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A first element of interest which can be extrapolated from the data analysis concerns the greater orientation towards social sustainability of companies certified with the Equalitas Standard. It is therefore a question of verifying the "compliance" between what is declared by the company and what is attested by the certification, and whether the Equalitas certification process is able to capture variables that are not only environmental, motivating the companies that adopt it towards issues which are more sensitive to aspects connected to social sustainability. This is obtained first of all by taking as a reference the central (average) orientation trend index, which is 3.98 for the total of the sample, 3.89 for non-certified companies, 4.09 for companies with the Equalitas Standard, which indicates a greater propensity for social sustainability on the part of the latter. The correlation between the Equalitas certification variable and the orientation towards sustainability is also verified by the bivariate analysis (significant T-test because it is greater than the critical value). The certification factor is therefore

very relevant, even before the age of the company, its size in terms of employees or the turnover. This is not entirely unexpected proof, as the aforementioned certification requires that companies that wish to achieve it must comply with specific requirements in terms of good socio-economic practices, most of which are mandatory right from the first year of adoption of the Standard. Nonetheless, it is confirmed that Equalitas' attribution mechanisms seem to work effectively, ensuring that the companies involved are actually more aware of the issue than those which are not actively involved.

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It is also not surprising, given what has been said, that the sample companies with the Equalitas certification are more active not only in terms of orientation and therefore of awareness and resolutions towards sustainability issues, but also with regard to evidence-based results (degree of investment in social sustainability, attention towards territorial relationship factors, adoption of managerial organisational instruments such as a corporate welfare plan or a social report, application of a National Labour Collective Agreement for personnel). Particularly noteworthy is the fact that most of the certified companies have indicated their positive change in turnover both for the year 2020 (effective) and for 2021 (forecast, despite the not always rosy general expectations of sector operators regarding the 2021 harvest), with a total average for the year 2020 which stands between a 0% and a 10% increase in turnover, against an average value of between 0% and -10% recorded by the companies in the non-certified group. This evidence is consistent with what emerged on the greater resilience of wineries that are more oriented towards sustainability, and with the social dimension in particular, which, as we have seen, is particularly strong for Equalitas certified companies; all regardless of the age, size and turnover of the companies, which in the subgroup of the certified companies have various and heterogeneous characteristics in this sense (Levene Test on the verified group variance), and almost indiscriminately for

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<sup>6</sup> In particular, see sections 5.5 (Sustainable Organisation form), 6.3 (Sustainable Product form) and 7.5 (Designation for Sustainability form) of the Equalitas Standard called "Good socio-economic practices", and the related subsections Workers, Training, Relations with the territory and the local community, Good economic practices

the 5 groups of components (work, gender, territory, environment, process) detailed in § 4.2 of this report.

The certification instrument therefore seems to work well, as evidenced by the companies involved which all confirm

### **4.3.2 The role of the Tre Bicchieri Gambero Rosso quality awards**

Further considerations can be made by referring to a performance measure without an economic nature, but with a qualitative one, attributable to the presence of the number of awards and recognitions obtained by the wineries investigated in the last twenty years. In particular, the quality award of the “Tre Bicchieri” wine awarded by Gambero Rosso was taken into account. During the time frame considered, this concerned several companies taking part in the survey at least once (to be precise, 42.1% of the sample investigated). It is interesting to relate the receipt of this recognition, and the number of times companies have been given the award, with the data collected on the behaviour of companies in terms of sustainability, on their labour policies and on their resilience following the Covid-19 crisis. In the first case concerning the orientation towards sustainability, it can be argued that there is a weak association, especially as regards the components of gender and of relations with the territory (which indeed are not assessed for awarding the prize; other subgroups of orientation towards social and socio-environmental sustainability (Environment and Process components of § 4.2) are instead correlated, albeit weakly (Pearson correlation coefficients 0.187 and 0.236), with the number of “Tre Bicchieri” awards obtained. Respect and defence of biodiversity in the countryside (soil and ecosystem), adoption of regenerative agricultural practices, organic management of vineyards and transparency in the communication on the use of oenological additives and adjuvants are instead the specific variables of orientation towards sustainability which appear more correlated with having or not received the award.

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Precisely because of the nature of the Gambero Rosso award, focused on the all-round quality of the wine, no significant differences emerged between the group of com-

panies with the recognition and those without, with reference to the labour policies implemented by the wineries consulted. A general lack of knowledge of instruments for employment support as well as the application of national contracts on a large scale and in all company areas is also confirmed in this subset of the sample. At the same time, there are no significant indications in the analysis of the statements given by the companies concerning their turnover trend, which appear similar regardless of whether or not they have obtained the award.

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An interesting element, on the other hand, is the association between the number of awards obtained, the company details and the company resilience during the crisis. The awarded companies are on average older and, confirming the fact that companies would be more resilient as their age grows, they responded on average that they suffered reduced turnover losses in 2020 and that they forecast a net growth for 2021, compared with what was recorded by the other non-awarded companies. This makes the “Tre Bicchieri” award a sort of proxy of resilience, even if it is not easy to establish the cause and effect of this relationship due to the extension of the reference time frame (twenty years) during which the assessments of older companies were obviously more favourable than those of the younger ones.

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Finally, it is important for the assessment of this paper to know that the sample of companies belonging to the set of those awarded by Gambero Rosso is distributed more homogeneously on the Italian territory (in our sample, there are 18 Regions covered) and that therefore, compared with the less significant results of the first analysis of this paragraph concerning the Equalitas certification, it provides an overview of some interesting trends for the whole national market.

## 5. First summary considerations

This research represents a first attempt to analyse the issue of work and social sustainability in the world of Italian wine supported by an adequate empirical data basis; the sample analysed, while not statistically representative of the national universe, still offers good coverage when considered in terms of generated company turnover. In particular, the analysis carried out focused on answering some research questions relating to:

1. the space currently occupied by work and social sustainability in the strategic orientation of Italian wineries;
2. the identification of variables and indicators of orientation towards social sustainability;
3. the relevance of the concept of social sustainability within the supply chain relationships and in relations with the territory for wineries;
4. the identification of the actions in place in favour of social sustainability and towards the issue of work by wineries;
5. verifying the existence of relationships between orientation towards social sustainability, work organisation models and company performance;
6. the association between obtaining sustainability certifications (Equalitas Standard) and wine quality (Gambero Rosso "Tre Bicchieri" award) and elements of orientation towards sustainability, corporate work policies, resilience to crises.

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The attempt to summarise some of the results from the empirical verification carried out, leads to the following first summary considerations:

- **Awareness.** The issue of sustainability is of great interest to wineries, which in general show a good knowledge of the subject with a good degree of adherence to the proposed definitions. The concepts of economic and environmental sustainability appear to be better handled by wine entrepreneurs as well as safeguarded by consistent investments, while the issue of social sustainability highlights sometimes less defined outlines and actions which are potentially "dispersed" in several directions

and are still weak on some axes.

- **Measurement indicators and action levers.** Social sustainability does not always appear easily attributable to a univocal definition and to a precise identification of the elements that it consists of. Based on the literature analysed and the statistical analysis carried out, it was in any case possible to identify five classes of main variables in the wine sector which we have called Work, Gender, Territory, Environment, Process.
- **Motivations and priorities.** For respondents, social sustainability appears to be one of the main drivers for business development (more than two thirds of the sample of companies interviewed indicate this), but with different motivations and priorities. Work-related issues, such as compliance with safety rules or traceability policies, are a key and a generally recognised component of corporate social sustainability, also because they are subject to rules and controls by the institutions. On the contrary, issues such as gender equality, migrants and attention to supply chain and territorial dynamics are considered less relevant by wineries.
- **Coherence.** Sometimes there is the perception of a discrepancy between the orientations towards social sustainability declared by the companies and the actual behaviour: on one hand, respondents showed a high sensitivity towards the issue, especially for some aspects (defence of employment levels, safety, coherence between environmental and social sustainability), on the other it seems to be implemented more towards actions guided by legal obligations (safety at work, transparency, compliance with wage rules, respect for socio-environmental practices) rather than towards the precise and organic satisfaction of all social sustainability indicators.
- **Strategies and competitive advantage.** Acting on social and work sustainability seems to be a strategy capable of affecting operational efficiency, that is the costs, more, while there is a certain difficulty in using this lever to support supply differentiation strategies through

marketing actions capable of generating greater revenues. At the moment, therefore, it seems that the main strategic lever is that of environmental sustainability, towards which social sustainability represents a “sister” dimension, albeit a different one.

- **Risks.** Businesses are interested in using social sustainability as a driver for strengthening their brand, following the growing attention of consumers towards ethical business behaviours, or as an instrument to promote the territory; but there is still little or no attention towards some concrete action levers (the adoption of corporate welfare plans, a top management policy that promotes real gender equality, or the achievement of sustainability certifications). A potential risk is that, like “green washing” strategies, communication policies of mere “social washing” may be implemented, therefore the issue of social controls and certification remains a topical issue to safeguard companies which are making concrete efforts to adapt their company logics.
- **Social certification.** The weak interest shown towards social certification instruments derives from the combination of two main elements: on the one hand, the cost-opportunity of obtaining the sustainability certificate is perceived as high by companies, which underline the impact of the actions required for fulfilling the requirements; on the other, the lack of knowledge of the instrument by companies is for now a hindrance towards the adoption of certificates, especially in relation to obtaining the standard of sustainable organisation and territory. On both these aspects, corrective actions (incentives, institutional communication activities) could be envisaged to encourage the adoption of good practices and company certification. The empirical examination carried out confirms that the companies certified with the Equalitas standard appear not only more oriented towards social sustainability in all its aspects (in compliance with the laid down requirements), but that they have also been more reactive in facing the economic crisis resulting from the Covid-19 pandemic.
- **Training and welfare.** From the analysis of the subject of work and organisation, there is appreciation for a

growing effort in relation to training and a good knowledge of work incentives; while there is evident ignorance and a scarce use of public welfare instruments. In some cases, despite the presence of public work incentives, companies do not use them significantly; a possible reason for this problem can be attributed to the complex structure of the incentives and to the related bureaucracy which discourage their adoption. On this aspect, further investigation by public decision-makers would be worthwhile.

- **Company organisation.** The survey reveals different approaches to the issue of outsourcing some processing phases which, in general, mainly concerns work in the fields and which only takes on medium-high intensity in some companies, therefore a specific study on the effects of outsourcing on social sustainability should be done more at the level of the single company rather than of an entire sample. In the agricultural world, the issue of outsourcing some processing phases must not be criminalised, but there must be awareness of the potential risks it entails (in terms of wages and worker protection), but also of the opportunities; among the latter, in addition to the possible cost advantages, we should also point out the possibility of following suitable offer differentiation strategies by activating a chain of socially certified subcontractors which could be included in the new policies for the sector (for example with ad hoc measures in favour of “agricultural subcontractors”).
- **Trade union representation.** We note the lack of trade union representation within the wineries interviewed which reflects the large presence of micro-enterprises (under 10 employees) in our sample, its incidence in fact increases (albeit slightly) as the company size increases based on the number of employees.
- **Company structure.** Social sustainability factors have shown a certain importance regardless of company size. Some differences are perceived based on the age of the companies: start-ups and younger companies show greater attention towards the issue of environmental sustainability, while the issue of social sustainability appears to have an important role in the so-called “long lasting

*wineries*”, companies which have been active for many years (some of the family-run type) in which a centuries-old production tradition probably makes them more sensitive to social problems and to the territory in which they operate.

- **Resilience.** The importance of investments in social sustainability on company performance appears significant, albeit not very highly so. Contrary to what is perceived by companies, investments on social issues, as well as those to be sustained to obtain a sustainability certification, can represent a growth factor and foster economic resilience in the event of a crisis, as emerges from the analysis of the relationship between orientation towards social sustainability and loss of turnover following Covid-19. This strategic option therefore completes the strategies based on the mere search for technical excellence verified through the positive correlation with the number of prizes and awards won for quality. The number of observations is not yet relevant enough to be able to generalise as regards the universe of Italian wine, but an interesting research hypothesis emerges (that companies more oriented towards social sustainability are more resilient), worthy of future study.

In conclusion, this research has enabled providing a first reading of the issue of social sustainability in the world of wine, highlighting a few positive aspects (such as the awareness of the importance of the sustainability issue for creating corporate value, the attention to some indicators monitored by the institutions), but also possible critical is-

ues (the delay in perception of some social indicators, the difficulty in implementing differentiation strategies based on social indicators, the ignorance of some institutional instruments to support them).

A “patchy” picture emerges with some Italian wineries appearing more sensitive to social issues and others lagging behind; subsequent insights will allow us to give more details to this reading. The first impression is that this partly depends on a dimensional problem where some smaller companies may be the weak link in the ability to manage the complexity of the various challenges which today affect the world of work (technological transition, globalisation of markets, migrations, gender equality, social problems of the territory in which they operate, etc.); but in other cases, rather than exceeding certain dimensional thresholds, what can make the difference appears to be the achievement of “cultural” thresholds (ability to read the scenario, skills, training) where the passion for the world of wine and for one’s company is able to merge with attention to the external dimension of the home territory and of society as a whole. The achievement of suitable entrepreneurial threshold levels (quantitative and qualitative) appears to be the most important challenge facing the players in the world of wine and the institutions which must promote the growth of this important industry, including social growth, with their policies.

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**EQUALITAS**  
