UDC 332.14
DOI: 10.34671/SCH.BSR.2020.0403.0014

CLUSTERS PERSPECTIVES FOR COMPETITIVE POSITION OF THE BULGARIAN WINE SECTOR

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Abstract. As a result of increased competition, dynamics in consumer preference and climate change, a complete structural transformation of the wine sector is observed, in addition to a reorganization of the layers of the global wine market. This invariably has an effect on the national winemaking. In its search for its place in this „palette" of a growing number of wine-makers and an incredible variety in the types of wines and trademarks, a key moment for Bulgarian winemaking is to strategically differentiate and competitively position itself on the global markets. Possible direction for competitive positioning on the prevalent functioning SMEs in the Bulgarian wine industry is the processes of clustering and tying them in to wine clusters, by using the cluster approach (with the focus on wine clusters), as a way to increase their competitiveness. The main focus is to the build the identity of the regions and its imposition them as a local wine destinations.

Keywords: competitiveness, wine industry, competitive position, wine clusters.

КЛЪСТЕРНИ ПЕРСПЕКТИВИ ЗА КОНКУРЕНТНО ПОЗИЦИОНИРАНЕ НА БЪЛГАРСКОТО ВИНОПРОИЗВОДСТВО

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Анотация. В резултат на засилена конкуренция, динамика в потребителските предпочитания и промени в климата се отчита цялостна структурна трансформация на винения сектор и пренареждане на пластовете на световния пазар на вино. Това неизменно оказва влияние върху националното винопроизводство. В търсенето на своето място в тази "палитра" от нарастващ брой винопроизводители и огромно разнообразие от видове вина и търговски марки, водещ момент за българското винопроизводство е да се диференцира стратегически и да се позиционира конкурентно на световните пазари. Възможно направление за конкурентно позициониране на преобладаващо функциониращите в българската винарска индустрия микро-, малки и средни предприятия, са процесите на клъстеризация и обвързването им с винени клъстери, като се използва клъстерният подход (с акцент върху винените клъстери), като начин за повишаване на тяхната конкурентоспособност. Основният акцент е към изграждане на идентичността на регионите и налагането им като локални винени дестинации.

Ключови думи: конкурентоспособност, винарска индустрия, конкурентна позиция, винени клъстери

КЛАСТЕРНЫЕ ПЕРСПЕКТИВЫ ДЛЯ КОНКУРЕНТНОЙ ПОЗИЦИИ БОЛГАРСКОГО ВИНОДЕЛИЯ

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Аннотация. В результате усиления конкуренции, динамики потребительских предпочтений и изменения климата наблюдается полная структурная трансформация винодельческого сектора в дополнение к реорганизации структуры мирового винного рынка. Это неизменно влияет на национальное виноделие. В поисках своего места в этой «палитре» растущего числа виноделов и невероятного разнообразия типов вин и торговых марок, ключевым моментом для болгарского виноделия является стратегическая дифференциация и конкурентоспособность на мировом рынке. Возможное направление для конкурентного позиционирования в винодельческой промышленности Болгарии - это процессы кластеризации и привязки их к винным кластерам, используя кластерный подход (с акцентом на винные кластеры), как способ повысить их конкурентоспособность. Основное внимание уделяется формированию идентичности регионов и их привязку к местным винодельческим направлениям.

Ключевые слова: конкурентоспособность, винодельческая отрасль, конкурентные позиции, винные кластеры.

INTRODUCTION

The global wine market functions in the conditions of fierce and growing competition. On one side are the wine producers of the „Old continent" with their century-old traditions and good practices in the field of production and trade of wine. From the other side - are the countries from the so called „New wine world", which use more modern style and modern methods in the production of wine. According to the experts in the field our country is defined as the next „combined style", which contains elements both from retained traditionalism and from the modern taste which is usual for the „new wine producing countries", that have positioned themselves among the leaders in the last years.

There are also climate changes that are observed and which absolutely have effect on the quantity and the quality of the produced wine and also cause changes on the world wine map. Additionally to the above mentioned, there also cannot be dismissed the dynamical changes in the consumer's tastes and preferences, that set the necessity for satisfaction of wide diversity of needs of clients with different tastes, purchase possibilities, status, incomes, wine culture and so forth. In response to that, there is a wide range of wines with different quality, origin and price in different package and quantity that are presented on the market.

This on the other hand causes the necessity of differentiation and positioning of the competitive environment of many wine producers, wine types and trade marks.

The above mentioned is and indicator for the formation of a new market realm, which is characterized with an overall structural transformation of the field, and which is reflected also in the Bulgarian wine production. There appears to be a need to define It's competitive position, based on the taking in account the levels of competitiveness reached.

Possible direction for competitive positioning on the prevalent functioning SMEs in the wine industry in our country is the processes of clustering, established trough the cooperation of the related organizations in the sector. The cluster approach corresponds with the belief that the bounded organizations function as one whole system (cluster) and "the competitive advantage is becoming even more a function of the degree at which the company can manage the whole system" (Porter, 2004:68). Michael Porter suggest also the first graphical conceptual project for a wine cluster (Porter, 1998:77) – The California wine cluster. Based on the concept for a wine cluster are created and function similar structures, located in different wine regions around the world (ex: South Australia; Niagara, Canada; Bordeaux, France; Baden, Germany; Mendoza, Argentina, Casablanca, Chile and others), as research interest in them is growing [1-5], etc.

In connection to this, the formation of a wine cluster is considered a main factor for creation of stable aggregate competitive advantages, offering of an aggregate product and an imposing of common identity of the wine regions in our country.

The object of the current study is the Bulgarian wine industry, as a traditional sector from Bulgarian economy (the case of micro- and small enterprises from the wine industry in Plovdiv region).

The subject is the clusters perspectives for competitive positioning of Bulgarian wine production.

METHODOLOGY

The author's thesis is that for the competitive positioning of micro- and small enterprises from the wine industry a possible direction is the integration of their competitive advantages and activities in wine cluster. This would increase their competitiveness and contribute to a global image of the wine region.

The aim purpose is to present the competitive position of Bulgarian wine sector and opportunities for development trough cluster approach.

In this sense, *the research tasks* of this analysis are:

1) make some theoretical remarks, regarding the concept of competitiveness, competitive environment, competitive position and cluster approach;

2) make a description of the specifics (with a focus on the wine regions) and the key competitive advantages of the Bulgarian wine sector, as a basis for its competitive positioning;

3) present of some opportunities for clusters perspectives for competitive positioning of the Bulgarian wine.

The used methods are: processing of quantitative and quality data, content analysis and comparative, situational and sectoral analyses. The approaches used are: integration, system and cluster approaches.

The sources of data are: Executive Agency on Vine and Wine (EAVW) in Bulgaria, Agrarian reports of Ministry of Agriculture, Food and Forestry of Bulgaria and etc., and information from empirical studies.

A research has been conducted [6] on competitiveness of micro- and small enterprises from the wine industry in Plovdiv region (February-March 2018).

Target group - According to information provided by the NSI, in the territory of the Plovdiv region as of 2016 (reference as of December 2017), there are 34 wine-producing enterprises with code 11.02 - Production of wine from grapes. Of these, 33 meet the criteria: for micro- and for small enterprises. Out of it, 25 enterprises were identified. Micro and small wine producers are observed as a strategic group [6].

The empirical studies are based on online structured interviews and in-depth interviews. An evaluation by an expert opinion is executed, as the respondents are the owners, managers or marketing managers of the researched enterprises.

The given results indicate the key competitive advantages for the competitive positioning of the wineries studied and indicative for presence of a wine cluster.

The collected data was processed with IBM SPSS Statistics and Microsoft Excel.

TEORETICAL REVIEW

As a general concept for development, the competitive ability has a growing importance both progress of individual economical units, and also in relation to the prosperity of the nations. The above mentioned gives basis for the same to be inspected on different levels of governance (micro-, meso-, macrolevel), and from there to be measured and evaluated with different methodology for each of its individual aspects: product, company, industry, national economy. The multidimensionality, the lack of unification and the relative character of the competitive ability lead to the necessity the category to be considered in the context of different conditions of the environment, as the (complex) effect of many factors which affect it is taken into account.

Taking into account that between the individual levels of competitiveness exists an interconnection and interdependency (the same function as an united system) and also that „one nation can't be competitive in everything" [7-22], the focus must be set not on the economy as a whole, but on „particular industries and industrial segments" [8-81], in which is observed a higher production growth. This way are denoted the two major criteria, which develop the competitiveness and the choice of competitive strategy [7-58]:

- *structure of the industry*- defined based on the analysis of the competitive environment;

- *positioning in the industry*- as a way to derive „the maximal amount of it's abilities, discerning it from it's competitors." [8-81].

For this purpose is needed a periodical analysis both of the industry's environment evaluation of it's attractiveness for the enterprises, functioning within it, and also in relation to the establishment of the competitive advantages of the companies-competitors, based on which the same are ranked between themselves in the industrial environment.

The above stated justifies the term „competitive position" to be defined with one of the most common definitions, describing it as a „totality of the strengths and weaknesses of the company in given sector in relation to its general competitors" [9] and the place the organization holds „in accordance with its capabilities for creation and development of competitive advantages in relation to the other competitors on the market" [10].

Different understandings exist regarding the questions related to the indicators for evaluation of the competitive position of a given organization (and from there also on the other levels – industry, national economy). The same can be viewed as a basis for the formation of its competitive advantages and „as key factors for the success" [7] in the competitive struggle including „quality, value, abilities, knowledge, experience, resources, competencies and so forth." [6-48].

There exists a certain consolidation among the opinions regarding the definition of the market share as a leading and „crucial" indicator for competitive positioning of a company, industry, country [10-133], [11], [12-143]. That premises also the direction of the competitive strategies to be indeed the direction of its growth.

Possible direction for competitive positioning on the prevalent functioning SMEs in the Bulgarian wine industry (which due to their limited resources are uncompetitive), is the processes of clustering and tying them into local wine clusters.

Back in 1890 Alfred Marshall [13] puts an accent on the specialization of the different regions, with respect to the specifications of the environment (the factor conditions) and presents his idea for formation of industrial regions. That way for the first time he uncovers the meaning of "local concentrations" for the development of the industrial sectors and that of the national economy. Porter further develops his idea, focusing on the research of the industries and he supplements the pledged until that moment natural resources (as an element of the factor conditions), with the determinants: company strategy, structure and competition; conditions internal demand; related and support productions, which create the conditions, under which the environment, where different companies (sectors) are "born and learn to compete" [15-875] is formed. He defines the term "cluster" as one more encompassing and general term, which extends out of the frame of one industry and which represents "a geographic concentration of interconnected companies, specialized suppliers, suppliers of services, companies of the connected industries and those associated institutions, which are competing, but also cooperating” [15].

The clusters topic continues to have a growing research interest in looking for opportunities to increase the competitiveness in the conditions of globalization and growing competition even till present days [16-19], etc. The challenge is to determine the real visibility in the Bulgarian wine industry.

RESULTS AND DISCUSSION

1. Specifics of the Bulgarian Wine industry

A well known fact is that Bulgaria is among the countries with imposed traditions and long standing experience in the wine production and until the 80s of the previous century it was among the leading producers and exporters of wine. After the 90s because of inner processes in the sector including the privatization of the wine factories (which until today realize the overall production and export of wine) and the land reform (with the following break up into small pieces of the vine arrays, which affects the quantity and the quality of the grape, and from there of the wine) in Bulgaria is set the beginning of a new stage of the industry development.

To this moment, on the fragmented market of wine in the country function a big number micro- and small wine producing enterprises, with similar market shares. This presupposes their consideration as strategic groups.

The same are positioned in to major areas for production of regional wines and protected geographical indication – PGI [20]: *PGI Danubian Plain* and *PGI Thracian Valley*, as each of the regions is characterized with its typical wine sorts. There are 52 outlined regions for production of wines with protected designation of origin (uniqueness) - PDU [20], which have guaranteed and controllable origin in accordance with their terroir. There is a tendency towards production of quality wines (with PGI and PDU).

According to the data form Agrarian Report for 2019 [21], the total production of wine from the 2018 harvest by registered wine producers amounts to 1 040 650 hl, (with measured decline of 3,6% compared to 2017). According to the report, the wine produced within non-industrial conditions is 129 536 hectoliters of wine, which makes the total wine production for 2018 reach the amount of 1 170 186 hl (with a decline of 1,9% compared to 2017).To the total quantity for 2018 of the produced wines are included also: must, fruit juices and others, which combined share in the production for 2018 is about 4%.

As expected with the highest share (59,8%) are the table wines (without PDU and PGI). The share of the regional wines with PGI is about 38% and of the quality ones with PDU about 0,5% - quality wines (with PGI and PDU) – 38,5% (Fig. 1).

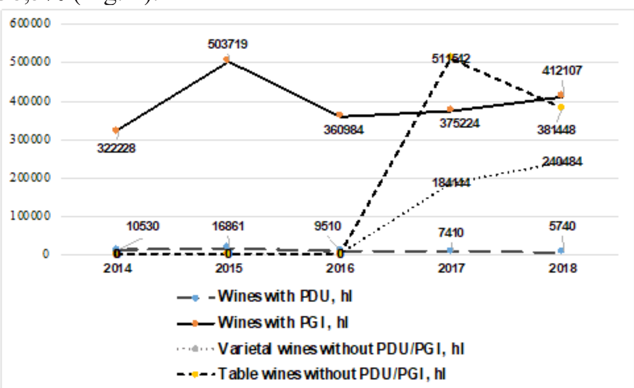


Fig. 1. Dynamics of wine production in Bulgaria, 2014-2018, hl,

Source: Autor’s research, based on data of EAVW

The quality wines are related to the specifics of the environment, the terroir. It is assumed that the terroir of the „feeling for place“ [22], includes within itself not only certain qualities of the product, but also the means by which the local environment affects it. The idea corresponds with the belief that certain products are not reproducible in the same way, outside, outside the environment from which they originate.

This way the qualities and the characteristics of the wine are viewed as originating from their special bond with the place of origin and with authenticity, given to them by the terroir. That justifies the definitive role of the place of origin for the production of regional wines a from there also the necessity for strategic orientation of the wine producers towards the creation of local identity by the means of imposition of regional products.

The wine sector in our country is fragmented and functions in the conditions of a growing number of wine producers and trade labels and various product lines. There is a monopolistic competition between the wine producers (mostly SMEs), in which the same don’t differentiate from each other based on the market shares they hold, but there can be observed an outstanding accent towards differentiation of the product, respectively the regional (aggregate) product.

2. Competitiveness Position of Bulgarian wines enterprises

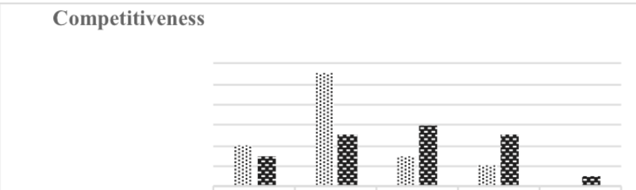
In the below presented data, from an empirical research among the of micro- and small enterprises from the wine industry in Plovdiv region (which are part of bigger work), there can be indicated some essential moments in relation to the formation of competitive status and the competitive positioning of the wine factories [6]:

1) Micro- and small enterprises are considered as a strategic group: enterprises are of the same type - they meet the criteria for micro- and small enterprises; operate in the same region - Plovdiv region; are influenced by the same environmental factors, have similar products, strategies, activities, consumers (markets), suppliers, intermediaries and other partner organizations, etc.

2) The strategic direction of the micro- and small enterprises from the wine industry is basically towards differentiation strategy, followed by 65% of the researched factories. Only 35% of them are striving towards diversification and development of auxiliary activities.

3) Results from the study of the enterprise and product competitiveness (presented on Fig. 2) establish high levels of their evaluation. The enterprise competitiveness is evaluated as very good in 25% of the interviewed, as good in 30% and according to 15% of the respondents it is excellent.

Even better are the rates for evaluation of the product competitiveness, which for 20% from the researched enterprises is excellent and for 55% - very good.



	excellent	very good	good	average	low
Product competitiveness	20%	55%	15%	10%	0%
Enterprise competitiveness	15%	25%	30%	25%	5%

Fig. 2. Competitiveness

Source: Author’s research work

4) The presented results confirm that when forming the competitive status (position) largely the focus is indeed towards increase of the competitiveness of the product i.e. the capabilities for differentiation and development of uniqueness (competitive advantages) are look for mainly in the product mix. More than 50% of the interviewed wineries rely on product differentiation as an indicator for competitive positioning (50% use it the utmost and 20% - to a very high degree).

Based on its items – product quality (95%), packing (75%), trademark (80%), labeling (75%), marking (55%), assortment (65%) is targeted the differentiation in the existing diversity of wines and the wide product line, which is presented on the wine market.

The highest rating is given to the quality of the products, that's why, the wine production is entirely dependent on the grape production-the raw material supply including vineyards, harvest (output), sorts, quality, age structure and so forth it is absolutely natural the raw material supply (access to raw material suppliers) to acquire a high evaluation result for forming of the competitive status and the competitive positioning of the wine producers (30% - high, 25% - very high). A leading moment in this case is that the quality of the raw material depends on the environmental nature conditions, the geographical location, the climate, the soils etc. it the terroir. That itself confirms the main role of the „place of origin" for the production of quality wines.

5) 80% of the interviewed set their focus also on the image of the trademark. These statements is fully understandable, taking into account that, „on one hand stands the question the organization to provide uniqueness" [6], by the means of which it differentiates itself and be preferred by the clients, and on the other hand is the development itself of a recognizable image as an instrument for „targeted affect on the consumer's expectations and viewpoints, which leads to forming decisions, related to the consumption of given product/service." [23].

A leading moment for the competitive positioning in regards to the factor is the establishment of *loyal to the trademark consumers* (80% - high importance is given by 60% and a very high by 20% of the respondents), which inevitably puts the focus on consumers (Fig. 3)

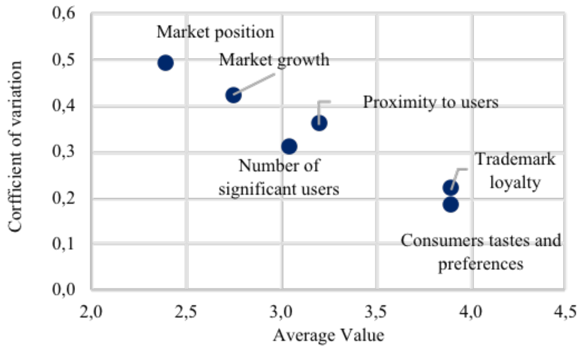


Fig. 3. Descriptive analysis – Consumers and Markets
Source: Author's research work

The analysis of consumers, as a factor in the formation of the competitive status of micro- and small wine enterprises, yields a maximum assessment of the elements of the factor: "consumer tastes and preferences" and "trademark loyalty" (Fig. 4). This orientation implies knowledge of consumer tastes and preferences and requires an adequate response from winemakers in terms of wine supply. This is an indicator that the benefits of differentiation through marketing tools and the creation of loyal customers in relation to a product, trademark, brand, place of purchase, etc. are realized.

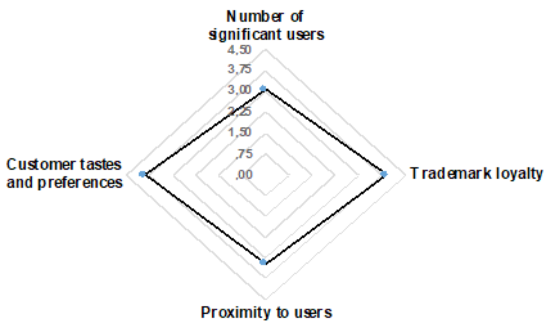


Fig. 4. Competitive status - Consumer
Source: Author's research work

Given the fact that „there is only one valid definition of the goal of the business: to create a consumer" [24], and on the other hand that „the postmodern society is the society of the consumers" [25-15] and the consumption is „the consumption of symbols" [25-15], of brands (author's addition); it is „a new form of communication and of comparison with the other members of the society." [25-15], the focus set towards establishment of loyal consumers is fully natural. The consumers are essential factor both in relation to the formation of the direction of the business direction and in relation to the development of its competitiveness.

3. Wine Clusters in Bulgaria

According data provided by a conducted research [6] among the wine enterprises in Plovdiv region (micro- and small), joint and related activities are conducted by around 70% of micro- and small wine production enterprises in the field, by the means of their participation in marketing systems for delivery, production, promotion and realization of wine. Participation in marketing systems is seen as a prerequisite for increasing competitiveness.

The interrelationships in performing joint activities, analyzed through cluster analysis [6], [26], [27], highlight their grouping in the following strategic directions: cooperation in wine tourism, integrate with each other in terms of the logistics of their products, relationships with stakeholders and implementing joint activities

The results show that the direction of the processes of clustering in the wine industry is towards the development of wine tourism (Fig. 5). In regards to wine tourism, related to visitations of the wineries 35% of the researched enterprises are cooperating. 30% of them rely on joint/related activities towards its realization by the means of organizing of festivals and joint participations in expositions, wine forums, degustations (also directions in the development of wine tourism), etc.

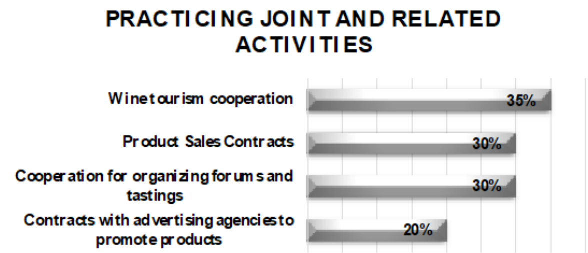


Fig. 5. Practicing joint and related activities
Source: Author's research work

According to the study, the following tendencies are verified as imposed in our country:

1. Around 74% of the surveyed have the opinion, that the partnership with other interested countries contribute to the formation of the competitiveness.

2. High evaluation (31%) and a very high evaluation (6,9%) is given to the joint activities regarding the competitive status and competitive position of micro- and small enterprises from the wine industry (the case of Plovdiv region).

3. The results verify and affirm the direction recognized by the wine producers towards offering of wine tourism in our country. That form of differentiation is connected to the offering of a that "package of different taste", which the tourists seek when they come here - "the different taste, the different climate, the different architecture and archeological sites – the different!" (in a executed interview - the specified corresponds to the idea of terroir and the vibe of a given place).

4. Cooperation is defined as a prerequisite for promoting and marketing Bulgarian wine and for establishing and establishing the local identity of its region of origin.

The results of the conducted studies indicate the existence of a formed wine clusters on the territory of Plovdiv region. Based on the typology proposed by Velev [18] the characteristics for identified on the territory of

Plovdiv region wine cluster are specified on Fig. 6 – (for more information see: [6], [26], [27], [28]):

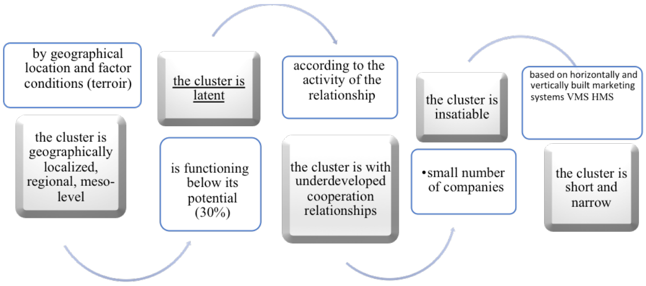


Fig. 6. Wine cluster in Plovdiv region, characteristics
Source: Author's research work

CONCLUSIONS

The wine enterprises in the country direct their strategies toward differentiation in a highly competitive environment. The accent of its reach is prioritized and oriented towards modification of the product mix, available quality raw materials, development of image of the trademark and establishment of loyal consumers.

Although the attempts to answer the occurring new tastes and preferences and the imposing "fashion tendencies" in the production of wine (trough modification of the product mix), the Bulgarian market continues to outline itself with its traditionalism. That's why it is necessary to the same to be positioned strategic, relying on the production of wines from authentic local sorts (with PDU and PGI), through which has to be created a recognizable representation of the Bulgarian wine on global scale.

That implies the accent to be moved from the separate producers to the development of an image of the wine regions, based on the specifications of their terroir. The aforementioned possible by realisation of joint and connected activities of all interested parties (stakeholders) and trough creation of networks for cooperation.

That fits in the idea for the creation of a cluster. Because of the fragmentation in the studied sector, its target is building and imposing of a common identity of the region as a wine destinations (which is based upon development of wine tourism). The above stated is a real opportunity for competitive positioning of the Bulgarian wine sector and necessitates of accepting a Strategy for creation of an common brand, with which the wine regions to be presented on the international wine market.

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Parts of the author's research in this paper are realised in project № KP-06-M25/5/17.12.18, financed by the National Science Fund, Ministry of Education and Science, Bulgaria.

The article was received by the editors 01.07.2020
The article was accepted for publication 27.08.2020