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Writing cases to advance wine business research and pedagogy

A Business Article by

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Abstract

This paper is meant to open a dialogue about the elements that constitute an outstanding wine business case study and, if used for teaching purposes, an instructor's manual. The ability to understand, synthesize, evaluate, and also create cases is becoming an increasingly important career-building skill for graduates of higher education programs across all disciplines. First we examine the market for wine business cases, and we then provide a step-by-step guide to the development of cases specifically targeted for wine business education.

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Discussion learning-based education, requiring the active engagement of students in critical thinking, has long been an important part of the educational mission at many business schools. At our universities' undergraduate, Masters, and Executive-level business seminars, we have used case method pedagogy to stimulate discussion-based learning. Students' written case analyses are also used to gather feedback on assurance of learning outcomes (AoL). These AoL comprise general business reasoning, global awareness, ethical issues, quantitative reasoning, as well as oral and written communications.

This paper is meant to open a dialogue about the elements that constitute an outstanding wine business case study and, if used for teaching purposes, an instructor's manual. The ability to understand, synthesize, evaluate, and also create cases is becoming an increasingly important career-building skill for graduates of higher education programs across all disciplines. Case studies about wine businesses can help achieve mastery of program learning outcomes and begin to close the loop (Alexander, 2011). Numerous wine business program graduates have reported that adding evidence of

their ability to create, review, or analyze cases to their "job search portfolios" had given them "an edge over other candidates" for a position. First we examine the market for wine business cases, and we then provide a step-by-step guide to the development of cases specifically targeted for wine business education.

The market for case studies

During Spring 2014, one of the authors of this paper conducted an on-line survey using SurveyMonkey to ascertain new needs for cases to enhance wine business education curriculum. Respondents were assured of individual anonymity but were given the option to self-identify if they planned to submit cases to a new textbook or journal. Respondents were asked to rate the importance of new cases by business sub-discipline—Accounting & Finance, Marketing, Operations, Management, and Strategic Management. The highlights of the survey were:

1. We received 118 complete responses from a global e-mail database of 886 business school professors for a 13.2% response rate. The database comprised members of the Academy of Wine Business Research, American Association

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Exhibit 1

A representative list of peer-reviewed case journals.

Source: Authors of this paper.

Name of journal	Sponsor	Accepts only decision cases	Accepts both decision and discussion cases	Primary focus
<i>Wine Business Case Research Journal</i>	Sonoma State University Wine Business Institute	X		Cases dealing with the wine industry
<i>Case Research Journal</i>	North American Case Research Assoc.	X		All business disciplines
<i>The Case Journal</i>	The Case Association		X	All business disciplines
<i>The Journal of Applied Case Research</i>	Southwest Case Research Association		X	All business disciplines
<i>The Journal of Finance Case Research</i>	Institute of Finance Case Research		X	Finance and Economics
<i>The Journal of Ethics & Entrepreneurship</i>	The Center for Ethics & Entrepreneurship, Gardner-Webb University		X	The intersection of ethics & entrepreneurship
<i>The Journal of Business Ethics Education</i>	Neilson Journal Publishing		X	Ethics

of Wine Economists, Western Casewriters Association, and North American Case Research Association.

- Respondents reported teaching a total of 6352 wine business students, and the annual average was 73 wine business students taught per respondent per academic year.
- Many respondents (58 or nearly 50% of the sample) reported that they taught courses related to wine business, and 18(16%) reported teaching *three or more* wine business classes in a given academic year.
- 50(42%) of respondents used cases extensively, and 49 (42%) used cases occasionally; respondents reported that case use was split evenly between undergraduate and post-baccalaureate courses.
- Respondents indicated that the following wine business case topics were of greatest interest (scale of 1=unimportant, to 5=very important):
 - Accounting and finance*: Sales forecasting (3.55), Business valuation (3.45), Financial Analysis (3.28)
 - Management*: New venture/Entrepreneurship (4.05), New business models (4.05), Performance measurement (3.82)
 - Marketing*: Differentiation strategy (4.08), Consumer behavior (3.98), Innovative wine marketing practices (3.89)
 - Production and operations*: Sustainability (3.84), Performance measurement (3.70), Supply chain management & value chain analysis (3.67)
 - Strategy*: Competitive strategy (4.04), Differentiation strategy (4.01), Competitive forces (3.90)
- 62 respondents (nearly 53% of the sample) expressed interest in developing and submitting new cases for publication.

Based upon these findings, there is evidently widespread interest in researching, writing, and publishing cases in the wine business domain.

Step 1—Planning

The initial step in planning a wine business case study (“case”) involves deciding its purpose or ultimate use. A case

can be intended for some research purpose i.e., to build or refute theory via comparative case analyses (Eisenhardt and Graebner, 2007; Sigglekow, 2007; Yin, 1994). Alternatively, a case can be developed for teaching purposes, i.e., to illustrate or derive theory in a classroom setting that involves a dialectical discussion to identify problems or challenges facing an organization and then generate and choose among solutions. In some instances, authors can craft a case that will satisfy both objectives, i.e. one might compare multiple teaching cases to build theory (cf. Gilinsky et al., 2008, 2010; Lawrence, 2010).

Aside from the differentiation between a case developed with a research purpose in mind and a case developed with the illustration of a theory in mind, there are also decision cases as compared to evaluative (sometimes called “discussion cases”). A decision case allows the student to internalize a real decision that an actor in the case must make and develop and support a solution for that decision. An evaluative case, on the other hand, presents information about a particular situation or event that has occurred in the past in an organization and allows the discussants to reflect upon the actions taken to learn lessons from the decisions made. This type of case can also be used to develop theory. One disadvantage of discussion or evaluative cases is that a number of journals only publish cases that are decision focused. Exhibit 1 is a representative list of case journals.

Step 2—Selecting a topic

Once you have decided upon the ultimate use of your case, put together a list of three-to-five major learning objectives and relevant interview questions tied to those objectives. It also makes good sense to tie your primary (field) and secondary (library or electronic database) research objectives to your program or school's learning objectives. See Exhibit 2 for five sample topics: (1) Goals, (2) Business model, (3) Situational environment, (4) Stakeholders, and (5) Assumptions and key metrics.

Exhibit 2

Sample topics for a wine business case.

Source: Authors of this paper.

Under-(or Over-) achievement of goals	Selection or evolution of business model	Changes in situational environment	Conflicts among stakeholders and/or their values	Changes in assumptions and metrics
Customer acquisition Market share Quality control Brand image/positioning	Family v. cooperative v. corporate ownership Management Processes	PESTEL analysis: P – Political E – Economic S – Social T – Technology E – Environment L – Legal	Founders/team Family (or families) Succession planning Stockholders/Investors Creditors Customers	Consumer behavior Future demand Revenue growth Pricing Costs & margins
ROI Capacity Capital accumulation Financial health Sustainability Managed growth, etc.	Sourcing Generic strategy (low cost v. differentiation, broad v. mass markets) Production (In-house v. outsourced) Distribution channel(s) IT systems, etc.	SWOT analysis: (Strengths Weaknesses Opportunities Threats) VRIN analysis: (Valued, Rare, Inimitable, Non-substitutable resources & capabilities, etc.	Suppliers Government Community Competitors Environment (natural world), etc. Ethics Corporate Social Responsibility Triple Bottom-Line	Industry forces Resources & capabilities Production output & efficiency Customer acquisition costs Customer attrition rates Staff turnover Competition from imports Exports as % of sales, etc.

Under-(or over-) achievement of goals

This is generally a good topic to get your case research underway, and to get at this issue, you might ask your case client (wine producer or support organization such as a bank, cooperage, tourism provider, distributor, etc.) about some of the major changes it has undergone over the years since that business was founded. Much in the wine industry has changed since most participants in that industry were born! Your case client's evolution over time may also illustrate the change from a family managed to a professionally managed business, or on a more macro level, the maturation of the wine industry sector itself, all reflective of shifting emphases over time. Your case could also show how your case client's top management team's strategies and leadership styles have changed to match changing situations over time (Churchill and Lewis, 1989; Daily and Dollinger, 1994; Greiner, 1972). Exhibit 3 illustrates how one winery, Beringer Wine Estates, evolved in the years since 1876, when it was founded by German immigrants in Napa, California.

Selection or evolution of a business model

Business models and how they have been adopted specifically in the wine industry are ripe topics for case authors. Business models often involve supply chain choices, degree of integration, and selection of distribution channel(s). For example, authors may want to illustrate the advantages and disadvantages of various business models, i.e., wineries are either partially integrated, fully integrated, or "virtual." Exhibit 4 lists some of the pros and cons of the virtual and fully integrated winery business models.

Changes in the situational environment

Wine businesses might well be characterized, to paraphrase former Sony CEO Morita and Reingold (1986), "[as] inheritors of a rich agrarian cultural tradition and philosophy, which are influenced by nature and change of the seasons," i.e., by analog thinking and slow motion. While the wine industry has heretofore experienced slow evolution, recently some players have pursued innovative strategies. Some innovations that may become interesting case topics include: sustainable farming techniques such as organic and biodynamic agriculture; specific varietal (vs. blended) products; packaging other than glass bottles and closures other than corks; market re-segmentation from two major price tiers to multiple tiers and into emerging demographic or lifestyle categories such as "GenX" or the "Millennials;" new marketing approaches such as 'lifestyle' brand names, wine clubs, fair trade and organic product labeling, use of the Internet to promote information and in some instances, direct sales; and, in selected cases, the emergence of new organization structures i.e., 'virtual' wineries. Yet most players in the wine industry have not yet adopted these innovations, either in total or in part, nor do they have plans to do so in the near future (Jordan et al., 2007).

Authors may want to focus on brand development in a domestic or a global context. A product-driven company is one that aims to make the best product possible and differentiates itself on the basis of quality. In striving for quality, the raw materials selected are critical. For a winery, this would be the grapes, barrels, etc. Some other descriptors of a product-driven company could include: high-cost production, price-resistant products, recognized origins or *terroir*, production limited by quality, quality/brand relationship, and/or lower sales and

Exhibit 3
Evolution of Beringer Wine Estates, 1875–present.
Source: Authors of this paper.

Dates	Ownership	Situation	Style	Strategy
1876 (founding)–1970	Beringer family	Agrarian nation; major wave of European immigrants; post-Industrial revolution	Family business, small business, agrarian	<i>Prospector</i> Early market entry in US. (St. Helena, CA); local/regional scope
1970–1986 (Wine World Estates)	Conglomerate-Nestlé	Growth in jug wine segments	Professional, economists & marketers	<i>Reactor</i> Subsidiary of MNC; leverage into national mass-market distribution
1996–1997	Private (via LBO)	Double-digit growth in premium wine segments; increased acceptance of wineries in public equities markets	Entrepreneurial	<i>Prospector</i> Re-invent company in premium wine segments
1997–2000	Public (via IPO)	Fragmented market; entry of Australian wineries into global markets	Professional; opportunistic	<i>Analyzer</i> Growth via acquisition and diversification of low-end segments
2000–present	Conglomerate –Foster's Group/Treasury Wine Estates (TWE)	Constant growth in premium segment; consolidation and maturity of trade channels; merger with Mildara Blass; spin-off from Fosters' Group into TWE	Professional, economists & marketers	<i>Defender</i> Operating unit of MNC; leverage into global mass-market distribution

Exhibit 4
Pros and cons of winery integration options.
Source: Authors of this paper.

Virtual Winery

<i>Pros:</i>	<i>Cons:</i>
Lower capital requirements	No winery for customers to visit
More flexibility to adjust to trends	Long-term assets are mostly intangible
Shorter delay before earning revenue	More difficult to build a “story” to tell
Lower operating risk due to decreased fixed costs	Lower contribution margin on incremental sales
Bricks & Mortar Winery	
<i>Pros:</i>	<i>Cons:</i>
Winery has a sense of place	Upfront costs are very high
Potential for appreciation of asset value, especially land and buildings	Delay from incurring first costs to earning revenue, especially with vineyards
Customer visits may build brand loyalty	Must project consumer tastes far in future
Higher contribution margin on incremental sales	Higher operating risk due to increased fixed costs.

Exhibit 5
Huneus's hierarchy of wine business differentiation.
Source: Huneus (2001), p. 102.

- Brand
- Packaging
- Varietal
- Star wine maker
- Image appellation
- Estate designation
- Proprietary name

marketing costs than rivals. Use of the “Hierarchy of Differentiation” [Huneus (2001), p. 102] is key to product-driven wineries. Huneus (2001): 101–102 indicates that, in order to sustain product differentiation, a winery must build a big brand image. There is a hierarchy that wineries can evolve through, as the product class gets smaller. Each further classification adds to a wine producer's ability to differentiate. An outline of this hierarchy appears in Exhibit 5.

However, since many students and practitioners lack multinational business experience, let alone managerial experience growing ventures in a diversified context, some case authors may want to illustrate the benefits and limits of operating in a global context. One way to do so is to consider strategic issues on the country level, corporate level, and business level, as follows:

- 1) To illustrate *country-level strategy*, design your case to examine the dynamics of competition among the “new-world” wine producers in Australia and California as well as other wine-producing countries (Porter, 1990).
- 2) To illustrate *corporate-level strategy*, design your case to create a dialogue over the benefits and limits of international, multi-domestic, global, and transnational strategies (Harrison et al., 2001).

Exhibit 6

Global strategic alternatives for a wine business.

Sources: Adapted from Bartlett and Ghoshal (1989) and Hill and Jones (2004).

Strategy	Advantages	Disadvantages	Winery X's Strategy
<i>International</i>	Transfer of distinctive competencies to foreign markets	Lack of local responsiveness Inability to realize location economies Failure to exploit experience-curve effects	Does not respond to need for cost reductions Does not respond to pressures for local responsiveness in wine segment
<i>Multi-domestic</i>	Ability to customize product offerings and marketing in accordance with local responsiveness	Inability to realize location economies Failure to exploit experience-curve effects Failure to transfer distinctive competencies to foreign markets	Meets need for localization in wine segment but does not address need for cost reductions
<i>Global</i>	Ability to exploit experience-curve effects Ability to realize location economies	Lack of local responsiveness	Makes sense for beer segment but not (yet) for wine segment May be driven by pressures for cost reductions
<i>Transnational</i>	Ability to exploit experience-curve effects Ability to: exploit location economies, customize product offerings and marketing to afford local responsiveness, and reap benefits of local learning	Difficulties in implementation because of organizational problems	Logical – given pressures for cost reductions and local responsiveness

Exhibit 7

Identifying and managing stakeholders' expectations.

Source: Adapted from Clarkson (1995).

Stakeholder	Stakeholder's expectations	If unmet?
Employees	Let us work together We want stable employment and fair compensation We want to be treated fairly	We can buy elsewhere...
Customers	We want you to meet our needs for quality and safety We'll both receive value	We can buy elsewhere...
Suppliers	We want to be paid on time We want information and repeat business	We can sell elsewhere...
Creditors	Let us form an alliance We want principal and interest to be paid back on time	We can seize your assets...
Stockholders/investors	We want you to protect and grow our investment We want you to become the industry leader	We can withdraw support...
Environment	Obey the rules Environment comes first	Mother Nature bats last...
Competitors	We are all in this together We can build an industry	We will overtake you...
Government	We want you to comply with regulations	We can close your operation...
Community	You have a responsibility	"Not in my backyard"

3) To illustrate *business-level strategy*, design your case to spark a debate over whether Winery X should focus on internal (organic) growth of its brands v. external growth via acquisitions. Illustrate some of the challenges associated with creating a "center of excellence," i.e., achieving synergies among globally diversified product lines such as

branded products, hospitality, and events (Palich and Gomez-Mejia, 1999).

The appropriateness of those strategies varies given the extent of pressures for cost reductions and local responsiveness (Bartlett and Ghoshal, 1989). International and global

Exhibit 8

Analysis of Napa Winery X's varietal wine portfolio.

Source: Authors of this paper.

Portfolio varietal (color)	Pros	Cons
<i>Cabernet Sauvignon (red)</i>	Highest volume super-premium/luxury wine Higher growth in demand for red wines Higher margins than all others except red blends Cult status of high-end Napa appellation wines	Long cycle from planting to sale and high inventory carrying costs Unknown if demand has peaked for this varietal
<i>Chardonnay (white)</i>	Highest volume among all wine segments Status of Russian River appellation wines	Low gross margin Flat demand Not currently sourced in Napa Unknown future demand
<i>Meritage (and other red blends)</i>	Expensive - demand limited to connoisseurs and core drinkers Highest margin wine	Requires Association membership to be called "Meritage"
<i>Sauvignon Blanc (white)</i>	Shortest cycle time to generate cash flow Grapes less expensive Demand currently exceeds supply	Flat to modest growth in demand Low market share
<i>Zinfandel (red)</i>	High gross margin Cult status & support from ZAP Low priced relative to other portfolio wines High past growth rates Demand currently exceeds supply	Low market share Rising prices for Napa grapes Demand may have already peaked
<i>Petite Sirah (red)</i>	Cult status and support from P.S. I Love You Low priced relative to other portfolio wines Fastest growing segment Demand currently exceeds supply	Low market share Lowest gross margin of all varietal wines Rising prices for Napa grapes Unknown future demand

strategies tend to be least appropriate in markets where local responsiveness to consumer tastes is important (e.g. in consumer food and beverage products industries, with the possible exception of sodas, beer, and spirits). At the same time, in the wine industry, competitive conditions are so intense that to survive, companies must essentially do all they can to respond to pressures for cost reductions and local responsiveness. [Exhibit 6](#) illustrates some of the advantages and disadvantages of different strategies for competing globally and applies those to Winery X's situation. Yet changing a company's business model to build an organization capable of supporting a transnational strategy is a complex and challenging task: implementation problems associated with creating the requisite organizational structure and control systems have been well documented ([Palich and Gomez-Mejia, 1999](#)).

Conflicts (or cohesion) among key stakeholders

There are multiple stakeholders involved in a winery supply chain, from suppliers to creditors to owners to staff, etc. Case authors should strongly consider presenting a 360° view of an organization using either multiple voices or multiple viewpoints to show how conflict is managed and consensus is gained. Most wineries are small, family-owned businesses, and members of families can often come into conflict over challenges such as the pace of growth, innovation, and succession planning. For all wine businesses, regardless of management or ownership, there may be disagreements with (or among) various actors, including staff, communities, creditors, and so forth. See [Exhibit 7](#) for examples of stakeholder expectations and needs.

Changes in assumptions or key metrics

One possible objective of a wine business case is to facilitate exposition of a hypothetical winery's — Napa Winery X's — portfolio options. [Exhibit 8](#) compares characteristics of its varietal wines.

Step 3—Writing your case and teaching note

Now that you have your topic and objectives in mind, it is time to get started.

Build a narrative arc

As a guide to preparing a wine business case, authors can use a more or less standard case-study format that includes five sections: 1) the strategic crisis or challenge (and its urgency); 2) an industry overview; 3) company background; 4) alternatives; and 5) future directions or options.¹ One of the great advantages to case writers inured to print media and to criticism about verb tensing issues, is that a digital media case — unless it is performed by actors using scripts to simulate a "live" performance — is automatically set in the past!

¹Numerous articles and books on case writing provide variants on this approach. See [Kirby et al. \(2010\)](#): 207, [Naumes and Naumes \(2012\)](#): 129, and [Vega \(2015\)](#): 61–69 for guidance on alternative narrative approaches.

Exhibit 9

What authors need to do to create a written (or digital) case for publication.
Source: Prepared by the authors for this paper.

Begin with your learning objectives

- Lay out your instructor's manual *before* you begin – 3–5 learning objectives, linkages to applicable theory, and questions for discussion
- Show how the learning objectives (LOs) match up with your program's LOs and/or course LOs
- List the salient evidence and data that need to be collected (and possible sources of those) in order to meet the above objectives

Outline your primary and secondary research strategies in advance

- Obtain written permissions to conduct field research
- Decide whether or not you will need to impose organizational, character, and/or data disguises
- Plan for both structured and un-structured interviews
- Cite source materials and acknowledgments
- Create a contingency plan in case the case client or protagonist suddenly becomes unavailable or is unwilling to proceed through a possibly lengthy testing and review process.

Make decisions about content before you create it

- Decide whether or not you really need a completely written (or digital) case, a hybrid case incorporating both a written and a digital case, or just an audio-visual supplement to a written narrative
- Decide how you plan to ensure access to content for students with disabilities
- Decide if you want your case to be accessible on mobile devices, which could require:
 - Use of high-definition video capture technology
 - Use of high quality audio capture technology

- Development of a shorter (e.g., < 10 min) case or a case in multiple short segments better suited for viewing on small mobile devices
 - Prepare a storyboard (Note: PowerPoint is well suited for this task) and, if it is a digital case, prepare a written narrative script, at least in outline form
 - Make clear separations between the story and the IM analysis (the IM is a separate, written document that *cannot* contain new information that is not in the case itself)

Test your case with students and colleagues before you submit for publication

- Test with live audiences and observe or ask for feedback about:
 - Logic of the narrative arc
 - Length of the narrative
 - Understanding of the case decision
 - Awareness of the alternatives under consideration
 - Gaps in character development
 - The need for other stakeholders' voices
 - Comprehension of data and information (e.g., Too little? Too much? Just right?)
 - Clarity of sound and images if multimedia are used
 - Need for subtitles or closed captioning if multimedia are used
 - Reliability of narration, e.g., any biases communicated by the narrator
 - Appropriateness of any ambient sound or music in between interviews if multimedia are used
 - Re-capture, re-edit, and test with audiences at least once more before classroom use or submission for an assignment or for publication
 - Ask another instructor to teach your case while you observe and take notes.
-

Develop a separate teaching note (also known as an instructor's manual)

An instructor's manual is not only necessary to qualify your case as being an intellectual contribution, but also can be very helpful to market your case to other professors and programs. The case analysis or instructor's manual should at a minimum demonstrate the contribution of your work to researchers and

practitioners. Has your case depicted an organization that is acting in consonance with what previous theorists have believed to be true, is it instead an outlier, or is new theory needed to explain those behaviors? Your instructor's manual should cover the following topics: (1) Synopsis of the case (i.e., 30–90-second “teaser” if created using multimedia); (2) Research methodologies used in gathering primary and secondary data for the case; (3) Learning objectives and potential contribution of the case to knowledge; (4) Theoretical foundation for the case and case analysis; and (5) Questions posed in developing the case, a rationale for those questions, and suggested answers to those questions with evidence and data to support. Consider framing the questions in a sequence from “Describe this...” to “Evaluate something using a tool...” and then “Recommend an approach based on the following criteria...” An Epilogue may be appended, in either digital or written format (i.e., as a case supplement or handout), depending upon your budget and time available for the project.

Exhibit 9 is intended to guide authors who are ready to embark on a wine business case project for publication.

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