

WINE CULTURE, TERRITORY/LANDSCAPE AND TOURISM, THE ENOTOURISM KEY PILLARS. HOW TO GET BUSINESS SUCCESS AND TERRITORIAL SUSTAINABILITY INSIDE WINE TOURISM ECOSYSTEM?

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ABSTRACT

The wine as a cultural product become the main theme of tourism development in the most 14 wine regions in Portugal. The wine tourism can be established as a regional development tool, allowing the integration of the primary (agriculture), secondary (wine industry) and tertiary (tourism) sectors, highlighting the landscape attributes and showing the regional “touristic terroir” (Hall and Mitchell, 2002) singularities. The tourism and wine industries are increasingly identified as natural symbiotic partners (Carlsan & Charters, 2006, p.18) concerned about business and territories’ sustainability. This win-win relationship must be anchored on coopetitive networks, taking advantage of partnership skills and stakeholders’ synergies. In this study, the first objective was to characterize the complex wine tourism ecosystem starting with a deep literature review. The Enotourism Ecosystem is composed by 3 pillars, the Wine Culture, Territory /Landscape and Tourism, where the touristic experience is the heart of visitor encounter with the material and immaterial heritage. The second objective was to identify the main wine stakeholders and partnership intensity degrees. The third objective pointed to Enotourism critical factors, seeking business success and territory sustainability. To get primary information it was built an online questionnaire survey applied to 51 wine tourism companies (convenience sampling). The findings showed a complex relational interconnectivity between stakeholders within the ecosystem, a low number of units establishing partnerships and a soft cooperation level with other players and public/private entities. So, to get business success and territorial sustainability, it will be crucial that all stakeholders must strengthen their partnership relations, developing coopetitive value co-creation strategies.

KEYWORDS

Enotourism Ecosystem, Stakeholders’ Coopetition, Wine Culture, Co-creation strategies

Introduction

Wine as a cultural product became the main theme of tourism development in most wine regions in the World and in Portugal. The present study started in section 1 with a deep literature review about wine Tourism concept and perspectives. The complex ecosystem key pillars, is explained in section 2 exploring Wine Culture, Territory/ Landscape and Tourism synergies. The section 3 presents the methodology based on an online questionnaire using a convenience data sampling, among 51 (fifty one) winery operators inside the 14 wine regions, and also the companies’ characteristics. The section 4 presents the study findings identifying the main wine stakeholders and partnership degrees. The wine production and tourism are essentially at opposite ends of the industrial spectrum and the business characteristics of each activity are essentially different, giving rise a latent conflict between stakeholders. According Hjalager & Richards (2002) and Carlsen & Charters (2004), traditional Enotourism management thinking sees other companies as rivals, not as potential partners,

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battling each other for dominance and profit, located on opposite sides of the spectrum of activities and with fully different strategies and economic conditions. The section 5 presents investigator Enotourism challenges and critical factors, seeking business success and territory sustainability. Assuming that the Vineyard landscapes offer cultural ecosystem services and Territory provides the endogenous products, singular memories and heritage, the Tourism must be a player with a profile of “touristic terroir integrator”, helping all stakeholders to get a common vision and mission and adopting win-win competition strategies.

Enotourism: concepts and perspectives

Hall & Mitchell (2008) refer wine as a complex and enigmatic product, being at once: a provider of sustenance and a luxury item; associated with healthy living, while in excess it can lead to dead; a symbol of status and a “peasant” drink; immense religious and cultural significance and can be associated with hedonistic behavior; a fashion item, experience and commodity all in one. Other researchers argue that Wine tourism regards wine consumption as social practice, being based on the desire to visit wine regions or in which travelers are induced to taste the regional wine producing and wineries in particular, while travelling for other reasons (Brown & Getz, 2005). The Table 1 shows the definition of wine tourism, explaining Supply and Demand perspectives connected with this thematic work and also landscape, community integration and territory points of view:

Table 1: Wine Tourism & Research Perspectives

<p>Hall (1996) define Enotourism has a travel purpose of visiting vineyards, wineries, wine festivals and wine shows, while the major motivating factors for visitors are wine tasting and/or experiencing the attributes of a wine region.</p> <ul style="list-style-type: none"> • This is a demand perspective, underlining customers’ motivation
<p>Getz (2000) sustains that wine tourism has the potential to provide a competitive advantage to regions with a grape and wine industry as well as to generate business for wineries and other related products.</p> <ul style="list-style-type: none"> • This hybrid perspective, underlining regional development and business supply side.
<p>Cavaco & Fonseca, (2001) believed in the association of wine tourism with the promotion of the cultural heritage landscape, giving rise to a new logic of development of the territories, with multidimensional impacts (involving processes of structural geographical change, building a significant social production, creating more balanced redistribution of wealth, improving income, increasing living conditions and expectations especially of disadvantaged social groups.</p> <ul style="list-style-type: none"> • This perspective focus on the multidimensional facets of the landscape.
<p>Williams & Kelly (2001, p.9) claim that “Enotourism involves more than visiting wineries and buy wine. It is the culmination of a number of unique experiences: environmental atmosphere, the surrounding environment, regional culture and gastronomy, the styles and varieties of local wines”.</p> <ul style="list-style-type: none"> • This perspective emphasis the total wine tourism experience supported by landscape.
<p>Charters and Ali-Knight (2002) argued that the wine tourism experience encompasses many characteristics including a lifestyle experience, education, linkages to art, wine and food, tasting and cellar door sales, winery tours, incorporation with the tourism-destination image and a marketing opportunity which enhances the economic, social and cultural values of a territory.</p> <ul style="list-style-type: none"> • This perspective center the attention on wine tourism experience attributes.

Hall and Mitchell (2002) use the term ‘touristic terroir’ to illustrate the combination of physical, cultural and natural elements that give each region its distinctive appeal.

- These researchers announced a new concept, ‘touristic terroir’ making a parallel of tourism territory with the vine plantation environment.

Asero and Patti, (2009) discussed that wine assumes different significances by playing a predominant, complementary, marginal, or exclusive role in the tourism supply of a territory, but in all cases it is a factor of competitiveness for a destination. They reinforce this idea by saying that local stakeholders must build up a system of relations between wineries, organizations and wine associations to be successful.

- This hybrid perspective joins the business point of view with destination competitiveness.

Source: Own production based on Hall (1996), Getz (2000), Cavaco & Fonseca, (2001), Williams & Kelly (2001), Charters and Ali-Knight (2002), Hall and Mitchell (2002), Asero and Patti, (2009).

Getz & Brown (2006) refer that, this particular tourism activity is, simultaneously a form of consumer behavior, a strategy by which destinations develop and market wine-related attractions and imagery, and a marketing opportunity for wineries to educate and to sell their products directly to consumers.

On the other hand, the European Charter on Oenotourism (2006, p.2) define wine tourism as “ the development of all tourist and “spare time” activities, dedicated to the discovery and to the cultural and wine knowledge pleasure of the vine, the wine and its soil”.

The wine tourism is a very complex concept covering several research fields, stakeholders’ interests, territory strategies and business perspectives. Firms and the territories where they are located are interlaced realities. The evolution of territories is influenced by the firms adopted strategies, as well as regional characteristics and dynamics. The interconnection between firms and territories is thus a key issue for territorial sustainable development. This issue is particularly important for tourism industry because region attractiveness depends not only on territory endogenous resources, on landscape but also the spatial companies’ interaction.

In the Wine sector, competitive positioning of wine tourism regions has become an important strategic issue (Williams, 2001), as the volume of wine has been increasing substantially and numerous regions are now aggressively marketing to attract high-yield wine tourists.

According to IVV, IP, the history of national viticulture is similar to the most European wine-growing countries, having large swings in response markets. The Wine production evolution in Portugal (1883 - 2014) is perceived in Figure 1.

Figure 1: Total Vineyard Area– Portugal



Source: IVV, IP 2014

Explaining the above figure, the history of national viticulture, similar to most European wine-growing countries, has seen large swings in response to markets. So often there have been periods of uncontrolled expansion, resulting in rising prices and dragging behind production volumes, after which the market make corrections, that often have generated serious crises, leading winemakers to very difficult situations. After integration in European Union, were created permanent mechanisms that allowed plantation replacement from less favorable places for culture, alongside the creation of legal and financial instruments that allowed and facilitated the replanting large areas of vineyard in areas and areas more convenient and more fitness.

The imagery of wine Country as a rural paradise has been taken to wine consumers, in which leisure, cuisine, scenery and outdoor activities are plentiful. According the Wine Spectator (August, 31, 1997) “as anybody who loves wines knows, the regions where the finest wine is made are special places—even magical”. Since the decade of the 1990s customer’s imagery has been shifting, from an emphasis on wine production and related facilities to more aesthetic and experiential dimensions.

Williams (2001) study, noted that consumer research on perceived and preferred wine country imagery is needed to permit proper wine region positioning in order to a sustainable development. Bruwer (2003) thought the appeal of wine regions to be based on “difference of place”, and these differences must be branded. Hall and Mitchell (2008) used the term “touristic terroir” to describe the combination of physical, cultural and natural environments that give each region its distinctive appeal as a destination for wine tourists.

Both natural and cultural structures are important, but attractiveness is also related to distance (real and perceived) to markets. Getz (2000) drew the process and contents of wine destination development, involving attractions, services, hospitality, training, infrastructure, organizational development and a marketing plan, and we will add coopetitive value co-creation strategies.

The complex Enotourism ecosystem

Enotourism should be seen as an ecosystem,- combining all different stakeholders’ interests, being permeable to the external environment, influencing and being influenced, secured by mutual benefits of management networks. This complex ecosystem is sustained on three pillars, the Wine Culture, Territory/ Landscape and Tourism, combining all different stakeholders’ interests inside this landscape. The Figure 1 shows the 3 wine tourism pillars and the next sections will detail each one:

Figure 2: Wine Tourism ecosystem pillars



Source: Own production based on Hall, C.; Sharpes, L.; Cambourne, B.; Macionis, N., (2000) and Deloitte: European Enotourism Handbook Vintur Project, (2005).

To get business success and territorial development, it will be necessary: innovative and distinctive product strategies (in order to get competitiveness); singular touristic experiences/products designing, pointing to promote the discovery and the interpretation of Wine Culture landscape (delivering authenticity); Harmonizing all stakeholder's interests in order to regional development (to build territory sustainability).

Territory/landscape

Territory is the material base for landscape and the footprint of society. The Territory/Landscape is a concept related to "scenery", "governance", "planning", "memories", "legacy" and "sustainability". The multiple meaning "landscape" concepts is intrinsically holistic, such as we observe landscape as territory, as perception, as heritage, as a resource.

The European Landscape Convention, approved by the Council of Europe in July 2000, defines Landscape as "...a basic component of the European natural and cultural heritage"; "an area as perceived by people whose character is the result of action and interaction of natural and/or human factors". Inside this geographical territory we find cultural heritage, which according to Pereiro (2003), tends to have a public sense, community and extended collective identification.

The notion of cultural heritage, stated by Ballart (1997, p.17), arises when "an individual or group of individuals identified as his an object or set of objects". It can be said (based on European Landscape Convention, 2000) that the cultural heritage is a human group's cultural expression that retrieves memories, ritualized sociability (people identity) and transmit legacy for the future.

Rural wine territories are being sold as a rural paradise in which leisure, cuisine, scenery and outdoor activities providing unique tourist experiences, emphasizing the rural lifestyles and landscape.

Consequently, Territory, Landscape and Heritage become inseparable concepts enabling simultaneous use of all the physical, biological and cultural components making up the landscape. Cultural landscapes are areas "designed and created intentionally by man" (World Heritage Centre, 2012, p. 88), and the vineyard landscapes provide cultural ecosystem services.

We can then consider that landscape is nothing but the footprint of society on nature and previous landscapes and becomes also the social conscience and awareness of the territory by the people living there. (Brussard, P., Reed, J., & Richard, C., (1998).

The growing, making, and selling of wine (wine production) leads to vineyard landscapes, which are both physical and cultural landscapes.

As an example of singularity of wine regions' landscape preservation the California Association of Wine Growers introduced a Code of Sustainable Wine Growing, focus on: Environmental leadership; Maintaining the long-term viability of agricultural lands; Supporting the economic and social well-being of employees; Respecting and communicating with neighbors and community members, and responding to their concerns in a considerate manner; Enhancing local communities through job creation, supporting local business, and actively working on important community issues." (CCDRN,2015).

To illustrate this wine tourism ecosystem pillar, we can see Douro Valley as a "living and evolving cultural landscape".

Wine Culture

Vineyard and wine are parts of a cultural heritage, connected to history and it has been an essential element for economic, social and cultural development of different wine regions.

396 | The Wine Culture has grown as part of life, culture and diet since immemorial time. As a cultural symbol the wine importance has changed over time, moving from an imperative source of nutrition to a cultural complement to food and conviviality, compatible with a healthy lifestyle. Promoting the Wine Culture means authenticity to the origins, and a product strongly linked to gastronomy, taste pleasures and heritage. According to Deloitte European Enotourism Handbook - Vintur Project (2005, p.4) "Without the wine culture, enotourism does not exist.

The wine culture is the thematic axis of this product and the tourist must be able to perceive that during all the steps of their wine tourism trip and in any component of the Enotourism value chain. One should be able to "breathe" the wine-making culture. The enological-cultural value determines the weight of the wine element as an axis or a vertebra of the tourist experience".

In Portugal, cultural appreciation of wine reflects the diversity of our 14 wine regions, the *savoir-vivre* and culinary habits. The art of viticulture and winemaking has also grown improving the association of wine with gastronomy, history, tradition, origin, local quality products and dignified social settings. One important issue is the geographical characterization, land, physical, climatic, social and wine of various wine-growing regions, playing its historical, natural and winemaking heritage as well their singular identities. The wine tourism holistic landscape is important, as it is an authentic cultural element of great value which extends to all territory and has a sufficient potential to shelter a significant quantity of tourist services, activities and singular experiences.

Tourism

Goeldner & Ritchie, (2006), argue that the tourism ecosystem consists of organizations' networks stretching across several different spatial scales /industries/ activities, connecting several types of stakeholders attaching different values, papers, interests, capabilities, practices, diversity of resources and ideas. Due to the interdependence that exists between the heritage/touristic ecosystem resources and its users, successful implementation of ecosystem-based management depends on the identification and understanding of different stakeholders, their practices, expectations and interests.

According to TP (2014) is considered positive the wealth contribution of wine tourism. In terms of revenue, 62% of entrepreneurs consider the contribution of wine tourism as very important / important.

According TP (2015, p.27), this is a very young activity in Portugal, because 51% entrepreneurs started business in 2000s (decade) and 27% begun activity in 2010-2013. Enotourism is also a wine production complementary business since 50% are wine producers, 14% explore viticulture and 7% Tourism in rural space.

In this sense, and according (Hall and Macionis, 1998), the small wineries can be seen as a very small fish, competing in a fairly large pool, and reliant for survival on a somewhat romantic image of winemaking as a craft rather than as a business, on the personal reputation of a highly skilled and passionately committed owner - winemaker, and on high level of environmental integrity in the production process.

Wine industry could extend their revenues (competitiveness) by diversifying their activities to include tourism, not only as a complementary income but also by becoming an important promotional regional channel. If tourism is “experience” Urry (1999) and Cooper and Hall (2008) recommend, the wine tourism can be defined as well as an “total experience” a set of tangible and intangible services, which includes the endogenous resources, regional attractions, equipment and support infrastructures, entertaining activities, the local symbolic images and values.

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All 14 wine regions are building unique experiences and singular destination offers, with great heritage value to visitors and pride to communities. They are combining distinctive landscape attributes; attractive cultural and gastronomic events; a wide variety of outdoor activities; several museums join actions with partners and communities; wine quality production improvement together with hospitality concerns in ancient and modern architecture cellars; material and immaterial preservation, protection and renovation heritage assets.

All these 3 pillars are based on Policies.

The Policies in Chuck (1997) opinion refers to an overall, high-level plan that includes goals and procedures, generally found in formal statements such as laws and official documents and statements. Tourism Policy is generally considered to be an area of a nation's overall economic policy.

Governments facilitate tourism development by: providing the necessary infrastructure; grants and subsidies; long-term; low-interest loans; state participation in equity; interest rebates; financing research assistance; financing vocational training; tax exemption or reduction; duty-free importation of materials; preferential terms for sale or concession of state land, etc. In relation to travel and tourism, infrastructure involves fixed passenger transportation investment, destination services such as power, water, sewerage, hygiene and health, fixed communication investment, and so on.

To explain this Enotourism pillar we present Portuguese tourism strategic plan and other European policy cases. The PT (2013) - PENT [National Strategic Tourism Plan (2013-2015, p.18)], is clear when highlight the huge importance of country's image: “Taking into account the main characteristics of supply and global demand, especially in Europe, the following competitive factors in Portugal have been identified for this product(wine)”: “... J) To promote the wealth and quality cuisine and wines to complement the tourist experience, encouraging the application of the brand/concept “Taste Portugal” in products, equipment and services”.

PENT (2013-2015, p.29-39) emphasizes the need of creating a diversified and identity regional experience supply: “... Within the food and wine sector, there is the need to develop enogastronomics scripts, densify activities, develop content and experiences, particularly those related to wines Douro and Porto, and integrate the offer on promotion and marketing platforms “. This strategic concern has been reinforced in TP (2014), Horizonte2020 (2014, p.41-42) covering all 7 Portuguese regions (Norte, Centro, Lisboa, Alentejo, Algarve, R.A. Açores and R.A. Madeira) indicating Enotourism as an activity to be developed.

In case of Europe, we found several wine tourism entities with the task of promoting the sector, develop business and the territory: The RECEVIN (European Network of Wine Cities) union aims to strengthen the presence and visibility of Wine Cities in Europe; European

Enotourism Handbook, establishes the Enotourism management quality system and defines the method of starting, developing and recognition of European Roads of Wine; European Day of Enotourism exists to celebrate the Enotourism activity; European City of Wine is a competition for dissemination of Enotourism in Europe; European Charter on Oenotourism defines the wine tourism concept and establishes participation and cooperation strategies, seeking territory development and sector regulation.

It is crucial to accommodate the national and European Enotourism policies with heritage policies, such as the European Landscape Convention (ELC), as an important partner, in order to promote landscape protection.

For ELC, all Enotourism territory stakeholders must achieved the following objectives: recognize landscapes as essential components of people's surroundings, an expression of the diversity of their cultural and natural heritage, and a foundation of their identity; establish procedures for the participation of the general public, local and regional authorities, and other parties with an interest in the definition and implementation of the landscape policies; integrate landscape into its regional and town planning policies and in its cultural, environmental, agricultural, social and economic policies, as well as in any other policies with possible direct or indirect impact on landscape.

So, sustainable wine tourism ecosystem depends on the identification and management of distinctive issues relating to the endogenous resources of wine industry, tourism sector, heritage and theirs specific impacts.

To illustrate this Enotourism pillar, we show Douro Valley as an example of collaborative policies involving the DRCN (North of Portugal Regional Culture Direction) and ex-IGESPAR (Archaeological and Architectonic Patrimony Management Institute).

They work together regarding to add natural-human heritage of the Douro Valley, such as: the archaeological heritage of Foz Côa, the medieval heritage of the whole region, the city center areas of Douro's towns, into more complete cultural-heritage offers and incentives to develop activities related to heritage. With such a rich cultural heritage, there are many opportunities to create sustainable initiatives. The Portuguese Government using the PENT, H2020 and the Regional Tourism Agenda, through the Tourism Action Plan for the Northern Region have identified the Douro Valley as a Priority Tourism Destination.

In conclusion, wine tourism has emerged as a strategic development option for many companies and destinations. Companies with innovative behavior pursue product/ service differentiation, focus on cooperation strategies between sector stakeholders, emphasis on landscape heritage potential and are frequently reconciling internal objectives with new market/territory opportunities and environmental restrictions.

The cooperation inside the wine tourism sector must be a win-win joint effort between competitors, not limited only to cooperative alliances, such as joint ventures, outsourcing agreements, franchising, development associations, co-production or co-marketing initiatives, but extended the collective effort, to all types of stakeholders.

The involvement of the wineries with the tertiary sector, will promote the creation of innovative tourism products, activities and experiences, in order to build company/territory competitiveness; encourage the discovery and interpretation of Wine Cultural landscape, revealing region's authenticity; and leverage business and regional sustainability, achieving a new level of development.

Methodology

The starting proposition states that Wine Tourism is a complex ecosystem highly fragmented, with an intricate relational interconnectivity among stakeholders, based on policies, seeking to get territorial development and business sustainability.

This supply side study was undertaken to examine wine tourism among the main wine stakeholders' partnership types, using external data sources (TP, 2014; TP 2015) and an online questionnaire survey, as methodology.

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Based on Hill & Hill, (200), a Quantitative research was conducted by a questionnaire in order to achieve the research aims. To analyze the wineries' partnership strategies and emphasize some business success critical factors, we conducted an extensive literature review (section 1) that allowed us to develop a list of twelve questions.

A convenience sample of 51 wine producers inside the 14 wine regions (Vinho Verde, Dão, Távora e Varosa, Porto e Douro, Trás-os-Montes, Bairrada, Beira Interior, Tejo, Lisboa, Alentejo, Península de Setúbal, Algarve, Madeira e Açores), was the chosen universe data collection methodology. These provided data are compared to previous studies, such as TP (2014).

Budget and time limitations prevented the researcher from travelling to all physically approach and interview the winery operators. To overcome these collection data limitations, an online questionnaire was designed and submitted in Thesis Tools, containing both structured questions with blanks to be filled in and multiple choice questions and most statements could be answered using a Likert-type scale (1 = not important to 5 = very important).

The online questionnaire was sent by email. To identify the Enotourism contact details, the researcher used her personal/professional network and other web search sources. The main online questionnaire objective was to elicit answers to the starting question: How to get business success and territorial sustainability inside Wine Tourism Ecosystem?" The projected answer gives emphasis on win-win partnership strategies in order to get stakeholders synergies.

The vineyard is still a conditioned culture, so the management of planted vineyard area is effected by a set of rules defined in national or Community legislations relating to the rights issue, the plantations legality, varieties and access assistance regimes. In Portugal the Total Vineyard Area is 218 677 (ha) (IVV, 2014). The vineyard area planted in Portugal, on July 31, 2014 was 218,677 hectares, presenting its regional distribution in the Figure 3.

Figure 3: Total Vineyard Area– Portugal

Wine Region (2014)	%	(ha)
Minho	13%	27 432
Trás-os-Montes / Douro e Porto	31%	66 914
Trás-os-Montes	11%	23 303
Douro e Porto	65%	43 611
Beiras	24%	52 670
Tejo	7%	15 653
Lisboa	10%	22 425
Península de Setúbal	4%	8 622
Alentejo	11%	23 188
Algarve	1%	1 773
Total	100%	218 677

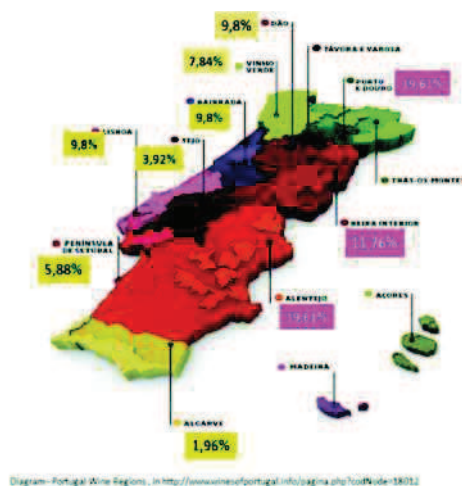
Source: Own production based on IVV, 2014

On the same date, the Azores had an area of 1,700 hectares and Madeira an area of 1,071 hectares. In Portuguese vineyards there is a set of 26 varieties more used grape varieties representing a weight of about 55% of the total vineyard area, with a predominance in red varieties (15 varieties) with 38% of the total vineyard area, which include three international varieties. The white varieties are represented with 11 varieties, all national representing 17% of the vineyard area.

In this context, the study begun with wineries characterization in terms of: wine region; human resources; wine rout association and partnership agreements. To discover the wine in its natural environment, it is understood that this is not an ordinary drink, but a traditional product, full of history.

The Figure 4 represents the wine region and the answers in percentages of 51 wineries (convenience sample): Alentejo (19,61%); Porto e Douro (19,61%); Beira Interior (11,76%); Bairrada (9,80%); Dão e Lafões (9,80%); Lisboa (9,80%); Vinho Verde (7,84%); Península de Setúbal (5,88%); Tejo (3,92%); Algarve (1,96%); Açores, Madeira, Távora-Varosa and Trás-os-Montes (0%).

Figure 4: Wineries survey: 14 wine Regions



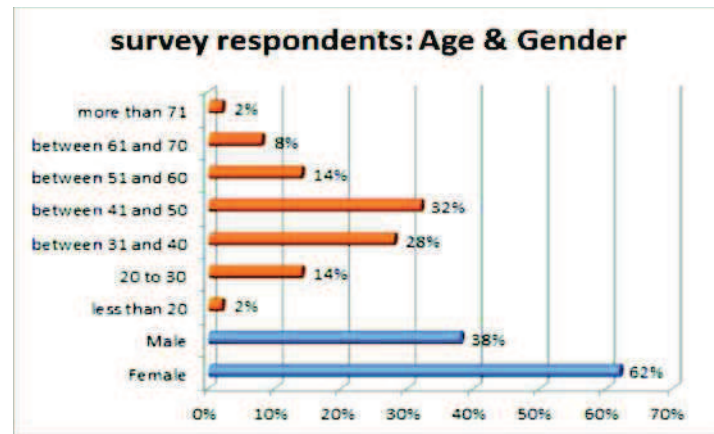
Source: own production over wine regions diagram of wines of Portugal

A region is a physical space, being the product of an act of delimitation, with a regional identity made not only of space but also of time and history. The landscape itself is a historical product of social determinations. In this context, wine tourism is an excellent vehicle for those who want to discover a region through the wine and meet all its cultural and touristic aspects.

According TP (2015, p.27), Wine tourism is a very young activity: 51% business started in 2000s (decade) and 27% begun activity in 2010-2013, and in 50% of cases the main activity is wine producers, 14% explore viticulture and 7% Tourism in rural space.

When observed the respondents Age & Gender (Figure 5) survey, it is showed 62% female gender and 38% Male answers.

Figure 5: survey respondents: Age & Gender

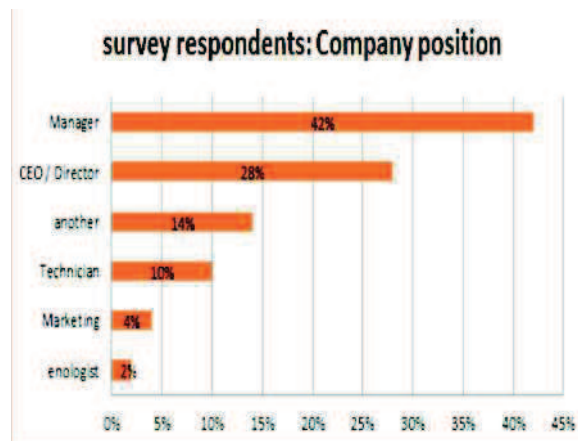


Source: own production

Regarding the age of the respondents, the largest number of Enotourism professionals had between 41 and 50 years old, 2% of working people with less than 20 years old, 14% with age from 20 to 30, and 28% between 31 and 40 years old, 14% between 51 and 60 years old, 8% between 61 and 70 years old and 2% more than 71 years old.

The questionnaire was mostly answered by wine tourism / wine industry managers (42%), followed by 28% of CEO/ Directors, 14% with other company position, 10% of technician, 4% connected with marketing and 2% of enologists (Figure 6).

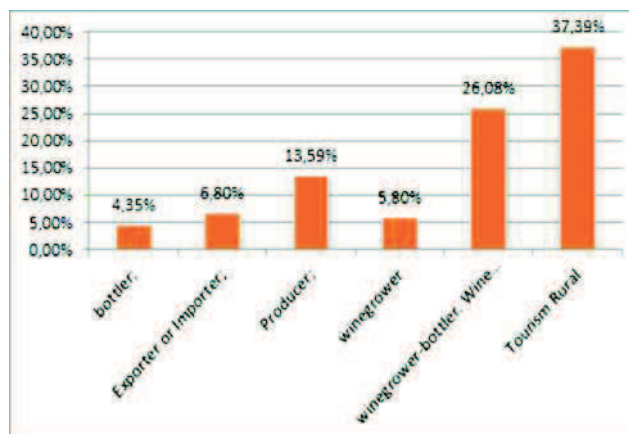
Figure 6: survey respondents: Company position



Source: own production

The core activity (Figure 7) of these wine Tourism companies are: bottler (4,35%); Exporter or Importer (6,80%); Producer (13,59%); Winemaker (5,80%); Winemaker-bottler. Wine tourism (26,08%); Rural Tourism (37,39%); Tourist Animation Company (4,82%) and Other activity (1,17%).

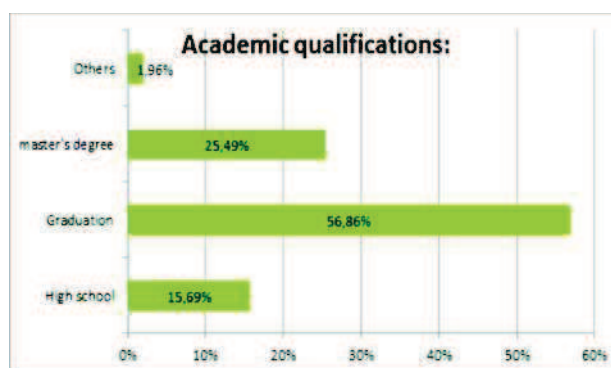
Figure 7: Entrepreneurs' Core activity (%)



Source: own production

When asked about qualification (Figure 8) we found that 56,86% has a graduation and 25,49% a master degree. The primary goal of company success is to provide an atmosphere that promotes employee empowerment. Empowerment requires the alignment, authority, capability, and commitment of employees with company's vision and objectives.

Figure 8: Academic qualification (%)

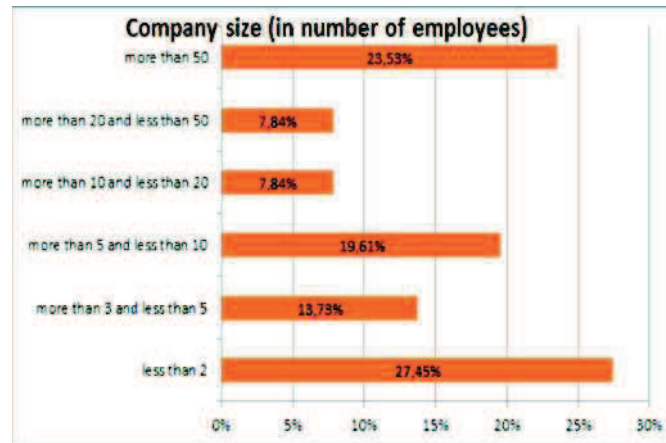


Source: own production

Alignment can be realized if employees: know the needs of customers and stakeholders; know, concur in, and be prepared to contribute effort to organization strategies, goals, objectives, and plans. To have the authority and opportunity to contribute to the organization, it is required individual authority, responsibility; absence of barriers. Employee capability can be developed through organizational training initiatives and educational development. The employees' commitment must be done with reinforcement, recognition and rewards. This study shows that 56% of professionals have a degree, but we do not know if the wine tourism professionals have competence in tourism and hospitality.

When regarding the companies' size (Figure 9) we discover different realities, 23,53% with more than 50 employees and 27,45% those with less than 2 employees.

Figure 9: Company size (%)



Source: own production

Tourism is a labor talent intensive industry, involving more than visiting wineries and buy wine, requiring several talents related to landscape, heritage, and identity. We found that 41,18% has until 5 employees, being small companies. So this is a business niche, considering that tourism is a secondary or tertiary activity to the wine sector. Dahringer and Muhlbacher (1991) defended that niche markets give firms added advantages, because there are a better use of resources in a narrow field where it has a distinct competitive advantage (asset's singularity).

In conclusion, Portugal is a country rich in wine regions with strong traditions of wine production. Wine industry is of great importance to the national economy. The recent study presented by Turismo de Portugal (2014), which features the Wine tourism, as one of the ten strategic products for the development of tourism in Portugal.

On the other hand, according to the National Statistics Institute (INE), the vineyard occupies the second largest area in absolute terms, with an area of 219 thousand hectares which corresponds to approximately 19% of the surface total planted.

According TP (2015), Portugal represents in Europe, about 2.5% of total revenues Tourist International, with several differentiating elements, such as: Climate and Light; History, Culture and Tradition; Hospitality and Concentrated diversity, modern authenticity, safety and competitive quality.

The SWOT analysis reveal the culture of wine and vineyard an important theme and a multi-faceted tourist environment. Portugal as a destination of excellence and historical-cultural authenticity of national and international level, supported by classified World Heritage sites and the rich historical and cultural heritage, material and the intangible.

The Touristic experience is the heart of visitor encounter with the "material" world (material and immaterial heritage). To get Wine Tourism sustainability, all stakeholders must balance their own business goals with a global/territorial development strategic vision.

The next section examine wine tourism among the main wine stakeholders' partnership types, investigating the evaluation parameters of territorial sustainability and the complex relational interconnectivity between Wine Tourism ecosystem stakeholders. Wine and tourism industries are two powerful sectors for rural development, requiring cooperation strategies between stakeholders, as mentioned by Inácio (2008, p.132) and Getz (1997).

Results

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The Wine Tourism is a 'territorial intensive product'. It is not just a member of a single industry but is a part of a business ecosystem, because it crosses a variety of industries; combines different stakeholders' interests; is permeable to the external environment; influence and being influenced; is secured by mutual benefits management networks (Moore (1993, 1997, 2006).

According to Turismo de Portugal (2014) in "The Wine tourism in Portugal" study, it is considered positive the contribution of wine tourism to wine industry contribution to the dissemination and wine recognition (96%). In terms of revenue, 62% consider the contribution of wine tourism as very important / important. It's obvious that the wine tourism in Portugal is still in its early age, requiring a strong action on network and scale, through regional strategic cooperation.

In this framework, the modern wine corporation is an institution of economic power and social impact. Wine Companies have grown because of the ability to mobilize productive resources and create new wealth and develop their region. The evolution of Wine Corporation has given rise to new opportunities and challenges that require a redefinition of sector/regional strategies and its objectives, in order to expand the ecosystem (composed by core business; expanded business) and deliver a fantastic touristic experience.

The wine tourism and cellar door experience is shaped by complex interactions of visitors and the service staff, the wine product, the cellar door setting, winery management systems, and other winery attributes. The service encounter can be managed and personalized by engaging with wine tourists and responding to the key products they seek. Singular wine tourism "products / experiences" are a combination of specific developments related to wineries or public investment in wine tourism, as well as programs such as changing the image and function of service centers to become "wine villages" or "wine tourism hotspots". The identification of key attributes in the wine tourism experience is a necessary prerequisite to enhancing wine consumer value.

In this study, the corporation partnerships involving a wider range of partnerships (wine tourism core business and expanded business) are reflected in Figure 10 (see next page).

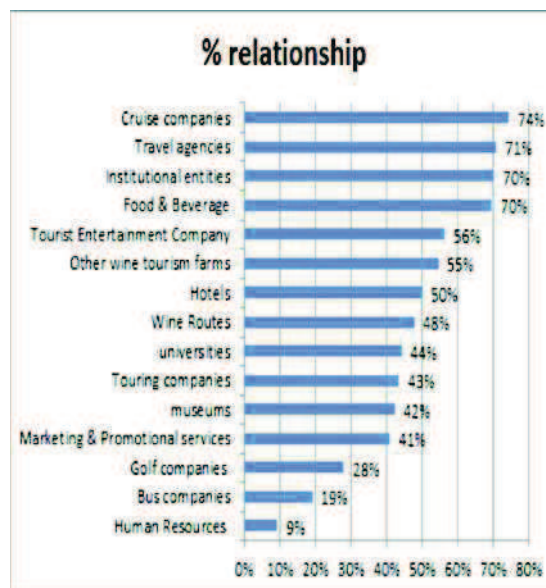
So, in this research we compared the Core Business and Product Offerings (based on UPT, 2016 research) with TP (2014) investigation.

It is evident from the frequency of variables identified that all firms offer the same kind of products/services, with similar results. Noticing that, the Core business is the blood of the corporate with a group of vital players: a) Wine Tourism Core Providers (Vineyards /Farms; Wineries/ Cellars Owners; Shop/tasting room/ own museum); b) Distribution Channels (Tour Operators/ Travel Agencies/ DMC's; OTA – Online Travel Agencies; Direct Suppliers); c) Direct Suppliers: Wine Cluster; Gastronomy Cluster; Hospitality Cluster; Professional team; animation companies; tour guiding.

Chris Zook and James Allen (2001) define the core business as that set of products, capabilities, customers, channels, and geographies that defines the essence of what the company is or aspires to be to grow its revenue sustainably and profitably.

The core business of all wine firms surveyed, are: "Wine courses" TP 30% / UPT 44,7%; "Videos visualization" TP 27%/UPT 21,8%; "Overstepping the grapes" TP 26% UPT 23%; "Exhibitions" TP 25% / UPT 29%; "Pruning the vineyard" TP 21% UPT 29%; "Grape harvest" TP 43% UPT 45,7%; Serving meals TP 48% UPT 56,7%.

Figure 10: Entrepreneurs' Core & Extended business (%)



Source: own production

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On the other hand, and according Dyer (2000), “extended enterprise” refers to a value chain in which the key players have created a set of collaboration processes allowing them to goals achievement and working together as an integrated team. So an extended company is who directly or indirectly, formally or informally, collaborate in the design, development, production, and delivery of a product to the end user (tourist). There is a clearly observable spirit of co-operation amongst those who grow the grapes and make the wine, because we found (55%) of partnership with “other wine tourism farms”.

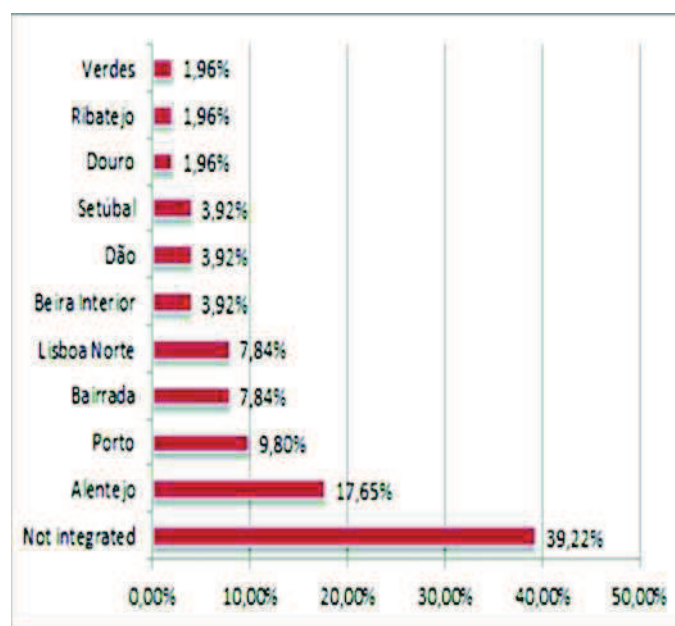
In this ecosystem the strong partnership is with Cruise companies (74%), Travel agencies (71%), Institutional entities (70%), Food & Beverage (70%). Getz & Brown (2006) argued that wine and food are one of three interdependent sets of core values of brand's regions, alongside wilderness/nature, and heritage/history. Wine and food must not be viewed as stand-alone “triggers” to attract tourists. We achieved similar results.

Another group of partners joined Tourist Entertainment Company (56%) and Hotels (50%). The less partnership levels are with Wine Routes (48%), universities (44%), Touring companies (43%), museums (42%), Marketing & Promotional services (41%), Golf companies (28%), Bus companies (19%). The results about Human Resources focus only got (9%). O'Neill and Charters (2000) argued for the importance of service quality at wineries. This is a huge way that wineries must develop in cooperation with other stakeholders. This is a prolific field for coopetition strategies.

In relation to the Wine Routes the partnership level is very weak (48%) (Figure 11). Wine Routes in Portugal are: Rota dos Vinhos Verdes, Rota do Vinho do Porto, Rota do Vinho do Dão, Rota da Vinha e do Vinho do Oeste, Rota dos Vinhos do Alentejo, Rota da Vinha e do Vinho do Ribatejo, Rota do Vinho da Bairrada, Rota dos Vinhos da Beira Interior, Rota dos Vinhos de Bucelas, Colares e Carcavelos and Rota dos Vinhos da Península de Setúbal - Costa Azul.

When asked (Figure 11) about the incentive to stay in a wine route, 90% of the Alentejo respondents affirmed integrated on the route, but 39% said that they did have any kind of interest in wine routes.

Figure 11: Wine Rout association (%)



Source: own production

Wine tourism companies don't see benefits in being integrated in a Wine Route. Wine Routes are privileged instruments for the organization and promotion of wine tourism, allowing visitors to more easily contact with the rural world.

They contribute to the preservation of the authenticity of each region through the dissemination of his craft, landscape heritage, architectural and museum gastronomy, contributing to combating desertification and constraints of some rural areas. They are also a solution for the promotion of the demarcated regions.

Enotourism companies must realize the importance of developing win-win relationship between all stakeholders. In our study, the cooperation and relationship importance is not the same between all partners (Figure 12).

Today's organizations operate in a more complex ecosystem, integrating inside their business, competition and cooperation (coopetition) strategies, linking a large diversity of stakeholders. The wine tourism ecosystems is a good example because it has a large range of stakeholders, with several types of attitude/motivation, such as: values, resource, interests, lobbying, goals, view, policy, legitimacy, credit (opinion), power, networks relations, strategies, which could influence the ecosystem. In this context all stakeholders listed in Figure 12, need to understand their operating ecosystem, adjust the relationship network, examine the market/network roles and plan several ways to explore recourses.

Figure 12: Wine Tourism relationship importance (%)



Source: own production

According TP, (2014, p.11), the Portuguese Enotourism partnership levels are very low: about 57% of companies answered having partnerships with other players, such as: Tourism Recreation companies (30%); Travel agencies (29%); Accommodation (14%); Food & Beverage (12%) and Institutional entities (9%). The collaboration degree with institutional entities, pointed to the existence of a regular cooperation between the Enotourism companies and the Wine Routes (52%), the Winemaking Regional Commissions (49%) and municipal players (45%).

To understand better the wine tourism companies, the questionnaire asked about the importance level assigned to the partner, and the answers are detailed in Table 2.

Table 2: Importance level assigned to the partner

Partnership companies	% relationship	% Importance	% valorization
Cruise companies	74%	22,22%	-52%
Travel agencies	71%	52,50%	-18%
Institutional entities	70%	53,66%	-17%
Food & Beverage	70%	70,27%	1%
Tourist Entertainment Company	56%	50%	-6%
Other wine tourism farms	55%	47,37%	-7%
Hotels	50%	47,22%	-3%
Wine Routes	48%	44,44%	-3%
universities	44%	40,54%	-4%
Touring companies	43%	43,59%	0%
museums	42%	29,73%	-12%
Marketing & Promotional services	41%	40,54%	0%
Golf companies	28%	20%	-8%
Bus companies	19%	15,63%	-3%
Human Resources	9%	15,15%	6%

Source: own production

The Table 2 compares the different stakeholders' relationship levels (% relationship) and the business importance assigned to that partnership (% importance).

The relationship valorization (%valorization) level is the difference between (% relationships) and (% importance). It is clear that, only the stakeholders: Food & Beverage, Touring Companies and Marketing & Promotional have a similar importance when compared with partnership level.

All the others elements have a lower valorization indicator which means a very soft stakeholders network.

This is an area where networking contributes to amplify the company's visibility and increase the value proposition from the customer. To get success, is vital distinguish the people with the power to significantly impact organization's health and sustainability and discuss the state of the sector with that ecosystem partners.

For an effective integration inside Enotourism ecosystem, all stakeholders (winery business interests and Tourism objectives), must build a common vision and mission, adopting win-win coopetition strategies, which could encourage a responsible attitude/behavior focused on: the sense of cultural heritage identity pride; recognition the sector niche as an important vehicle for regional development and local communities' sharing; commitment to explore the rural landscape's multifunctionalities; and assigning Enotourism innovative experiences projects, as a priority.

Enotourism Coopetition strategies: challenges

As a value creation strategy, coopetition exists at the intersection of the organization's internal value network, encompassing interactions between members within the organization and its external value network (Allee, 2008, p.6). Cooperation advantages are built from mutual relations between two or more competitors and the value created embraces competition advantages that originate in the competitors' drive to out-perform each other and in their intra-organizational interactions, studied by Bengtsson, Eriksson and Wincent, 2010; and Yami et al. 2010. Coopetition strategy as a concept, was develop by several researchers such as: Dagnino and Rocco, 2009; Kylänen and Rusko, 2011; Mariani, 2007.

The coopetition strategy permeates three main areas. First, focuses on the influence of all players involved in strategic activities (Johnson, Melin and Whittington, 2003; Regnér 2008; Vaara and Whittington, 2012), insights are provided into the importance of strategic actors across multiple organizational levels in formulating and implementing a coopetition strategy (Golsorkhi et al. 2010).

The second approach emphasizes the role that social embedding's structures, and interactions play in the strategy (Jarzabkowski and Spee, 2009; Regnér, 2008; Whittington, 2006). In this way, the social nature of coopetition is illuminated, thus explaining how the strategy is manifested internally in the organization and externally in the inter-competitor relationship. A link between the intra- and inter-organizational levels of analysis is also established.

The last approach serves as a tool for unifying current conceptualizations of coopetition as a strategy under a general framework. Through its assumption on strategy as "a reality in flux" (Golsorkhi et al., 2010), it supports notions of coopetition as a dynamic phenomenon

(Yami et al., 2010) and of the simultaneous existence and interplay between deliberate and emergent features associated with the strategy (Dagnino and Rocco, 2009; Kylänen and Rusko, 2011; Mariani, 2007; Tidström, 2008).

According Zineldin (2004), Coopetition is defined as business situation in which independent parties cooperate and coordinate their activities, thus helping to achieve mutual goals, but at the same time competing with each other as well as with other companies. Based on this concept, the transformation of a region in a reference wine tourism destination, results from logic of concentration, synergy, coopetition networks, in combination with a wine quality and some notoriety of the product promoted, not forgetting the identity and the spirit of these territories.

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This concept will be applied to wine tourism sector in Portugal. It is vital to identify the truly regional strategic specialization, the stakeholder's value co-creation key factors and the existing coopetition networks between business players.

A successful winery, i.e. a winery that is visited again and again by both older and new tourists, should be memorable, requiring a strong coopetition strategy. The elements that make a winery memorable integrate: inside atmosphere, design and physical aspect together with the setting within a beautiful landscape, the products themselves – the wines, the quality of the services, and the ambiance developed by the staff. But it is not enough to meet only one of these criteria to create an unforgettable experience for the visitors. Even if the wine is excellent, if the service is unprofessional, if people feel intimidated, or if the outlook of the winery is not at all appealing, wine quality is soon forgotten and the visitors will make only negative comments when asked about their experience at the winery. So, Enotourism manager must pay attention to demand side but also the supply side of the business. According Brandenburger & Nalebuff, (2011), there will be cooperation between local stakeholders when they set strategy together in order to develop their territories and competition among entrepreneurs through a differentiated products/service diversified offering that will reflect their singular cultural identity.

It's crucial a social engineering defined as an open and sincere dialogue between sensitive development professionals and active local communities as partners in a joint and open-ended discovery process. The final result will encourage responsible behavior among all stakeholders; set priority projects for developing tourism and safeguarding heritage; guarantee a balanced approach between site-conservation and site-promotion; identify strategic opportunities for economic growth and job creation. To do so, it is vital developing coopetition dynamics networks.

To be successful, it will be important to apply co-creation value strategies among all stakeholders and improve coopetition (cooperation and competition) dynamics, promoting creative cultural and natural heritage actions, as identity creators, with the view to build regional wine Tourism specialization.

According Mintzberg and Waters 1985; Whittington 2001, 2006, organization's coopetition strategy involve the ability to predict and control the influence of the external value network taken within the organization when formulating and implementing the strategy.

Cooperative activities arise out of mutual interactions between individuals at the inter-organizational level. Simultaneously, competitive activities stem from interactions occurring among organizational members at an intra-organizational level. The interplay between these

two types of activities, which results in the simultaneous existence of mutual value creation and the competitors' individual use of the common benefits created, lies at the core of coope-
tition as a strategy (Gnyawali and Park 2011; Ritala and Hurmelinna-Laukkanen 2013).

410 | To transform a wine region into an important coopetition tourism destination, it will be
necessary a logic of concentration, synergy, coopetition networks and diversity of specific
Supply in combination with a quality wine and some notoriety of the promoted product,
without forgetting the identity and the heritage of these territories.

Coopetition is a win-win relationship, taking advantage of stakeholder's synergies,
which is mutually beneficial. According Dagnino and Rocco 2009; Kylänen and Rusko 2011,
coopetition is also a planned practice, an adapting Practice and a Reacting Practice.

Coopetition, as a planned practice, involve goal-orientation and intension, characterized
by two key assumptions: internally, shared understandings and direct adoption of detailed
and articulated intensions exist at different actor levels, thus enabling the realization of the
strategy as intended (Mintzberg and Waters, 1985). The firms have the ability, as a result of
planning, to predict and control the influence of the external environment (Mintzberg and
Waters, 1985; Whittington, 2001).

Coopetition is an adapting Practice within the organization and in its external value
network. The environment is assumed to be complex, dynamic, and challenging to predict,
so, strategy formulation and implementation are characterized by the bargaining among or-
ganizational members.

Coopetition as reacting practice, considering cooperative and competitive activities are
rationally planned in a top down manner. But market development is not linear, so Managers
are consequently assigned the task to react and respond to unintended opportunities and
challenges arising in the inter-organizational interactions by formulating new practices and
engaging new practitioners at the intra-organizational level (Bonel and Rocco 2009).

It is clear the objectives harmonization, the cooperation around common goals, the
strengthen coopetition networks, the respect for cultural identity and authenticity and the
improvement of landscape multi-functionality in rural areas.

The wine tourism challenges are:

- Identify and work market segments interested in wine tourism experience;
- Encourage wine tourism companies for specialization, developing unique experience
programs;
- Invest in qualification, infrastructures and services to achieve hospitality excellence
levels;
- Establish quality standards in wine tourism experiences;
- Develop and communicate content that reinforce the identity territories;
- Encourage the increase of events and wine tourism routes;
- Complement the wine tourism market supply with other regional endogenous re-
sources;
- Reorganize Wine Routes in accordance with European Charter of Wine Tourism prin-
ciples;
- Strengthen coopetition networks;
- Extend the benefits to local communities.

From the investigation it will result a broad set of best practices, processes and knowledge associated with this activity, guiding the current wine producers with Enotourism businesses and potential new entrant, to harmonize their interests and activities with the full range of territorial stakeholders in order to sustainable regional development.

Conclusion

The wine as a cultural product has become the main theme of tourism development in most wine 14 wine Regions in Portugal. It is a complex ecosystem composed by Territory, Tourism and wine culture, involving more than visiting vineyards, wineries/cellars or buying wine, and highly fragmented by supply, demand, processes, activities, outcomes, players, requiring a systematic academic investigation and a continuous update of tourism professionals, in order to realize the major trends in the industry and ensure a fantastic customer service. It will be important the endogenous stakeholder's value creation anchored in clear regional strategies, focusing on the competence of internal resources to ensure the quality of the tourist experience. Being a systemic phenomenon, the wine tourism could be founded as a regional development asset, allowing the integration of the primary sector (agriculture), secondary (wine industry) and tertiary (tourism). Our main scientific concern around Enotourism niche, is developing an intense stakeholder's resonance about social construction/preservation process, fostering new relations within old traditions and draw exciting tourist experiences, when they encounter the historic "material" world. The focus is identifying, understanding; building and transfer best Enotourism practices and knowledge, which could help/guide policy makers, entrepreneurs and tourism/heritage managers, to match the interests of all stakeholders, shape the community identity and develop innovative authentic Enotourism territories. The Investigation aimed to identify the stakeholder's value co-creation key factors and the existing co-opetition networks between business players. The transformation of a region in a sustainable wine tourism destination, results from a concentration logic, synergy, coopetition networks, in combination with a wine quality and some notoriety of the product promoted, not forgetting the identity and heritage of these territories. There will be cooperation between local stakeholders when they set strategy together in order to develop their territories and competition among entrepreneurs through a differentiated products/service diversified offering that will reflect their singular cultural identity.

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