



REGIONE DEL VENETO



QUINTO CONGRESSO INTERNAZIONALE SULLA VITICOLTURA DI MONTAGNA E IN FORTE PENDENZA

FIFTH INTERNATIONAL CONGRESS ON MOUNTAIN AND STEEP SLOPE VITICULTURE

Conegliano (Treviso-Veneto) - Italia

29 marzo - 1 aprile 2017

"Le viticolture estreme: valori, bellezze, alleanze, fragilità"

"Extreme viticulture: values, beauties, alliances, vulnerabilities"

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ATTI PROCEEDINGS

COMUNICAZIONI ORALI ORAL COMMUNICATIONS

ISBN - 9788890233036

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Rural tourism and the development of the Demarcated Douro Region (ne portugal): a strategy to promote.

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Abstract

Emblematic space, the Demarcated Douro Region (DDR) is not only the privileged space where are produced wines of high quality, with prominently evidence to Port Wine, but also a landscape with a superb heritage that reflects a long history. In fact, along it's 250 000 hectares, terraces are full of vineyards that climb through the hillsides of the Douro River and main tributaries, providing a distinctive landscape, classified by UNESCO in December 2001 as "Living Cultural Evolutionary Landscape, World Heritage of Humanity".

Despite its privileged environment, the region is involved in multiple issues of which stands out the deficient structure of agricultural properties and an aging and receding human structure. In order to mitigate these problems, investment in restructuring of the vineyards and in the training of the landowners and employees, but, above all, in Rural Tourism (RT), in its various aspects, had been made. In this context, farms associated with Oenotourism and Habitation Tourism are multiplying, in addition to projects that have invested not only in quality and distinction, but also in a privileged landscape and local gastronomy/oenology.

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In this communication, based on extensive fieldwork in documentary research and analysis combined with the application of structured interviews, we focus on the impact of RT in the Douro Demarcated Region (DDR), especially of oenotourism.

In this context, after a general survey of the units in the DDR using various documentary sources, we selected a paradigmatic case to assess its impact. The repercussions of this strategic bet of the region are unquestionable, since this way a valuable heritage is recovered, while the vineyards are restructured and a patrimonialized landscape is preserved in a tendentially sustainable context.

Key words: Douro Demarcated Region, Rural Tourism, Rural Development, Sustainability.

1. Introduction

When addressing rural spaces, we usually refer to peripheral places but full of potentialities conducive to their revitalization (Cawlay, 2012). This is what happens in the Douro Demarcated Region, where wines of exceptional quality are produced, with evident prominence for Port Wine. We are in fact facing a landscape, cultural, gastronomic and oenological heritage to highlight, where terraces planted with vines are present everywhere, in a unique context, which justified their distinction by UNESCO in December 2001 as "Living Cultural Evolutionary Landscape, World Heritage of Humanity" (Aguiar, 2000). Nevertheless, several obstacles to its development are accumulated, especially those of the environment and landscape, to which are added the land ownership (Pina, 2007, 2013), in addition to social ones such as the demographic decline and the ageing of the residents, or the prevalence of a weak cultural and technical profile of the landowners and the agricultural employees (Pina, 2012a, 2013). There is, however, needed to correct this scenario. The aim is then to increase the productivity of the wine-growing sector by restructuring the vineyards and mechanizing

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the agricultural works, as well as improving the socio-economic framework, encouraging the training of owners and employees. At the same time, that minimizes the results of incorrect techniques used in the 1980s, for vineyard implantation that were responsible for the decharacterization of the traditional landscape and gave origin to erosive problems (Queiroz, 2010).

In spite of the problematic environment, there is still a superb landscape with the houses disseminated over the hillsides, some of which are manor houses from the 18th and 19th centuries (Pina, 2010, 2012a, Taborda, 2011), in addition to urban centers with a valuable architectural heritage, as Vila Real, district headquarter, which developed from the crossing of the main regional accessibility, or the city of Peso da Régua, the "capital of Port Wine" and Lamego, a very old Episcopal city. Many other small nuclei with high patrimonial values also extend until the Spanish border. Finally, we cannot ignore the C \hat{o} a Valley Archaeological Park, also classified as "World Heritage" by UNESCO, and the Douro International Natural Park (Dermendzhieva *et al*, 2011, Pina, 2012c).

Given the multiplicity of specific and differentiating endogenous resources, it is therefore necessary to define strategies to mitigate existing problems, the only way to develop in a sustainable way the region, always keeping in mind the trinomial territory/innovation/tradition. It was in this sense that, in addition to the strategic bets already mentioned, the Rural Tourism (RT) is increasingly favored in its various typologies. In this way the estates associated with Enotourism or Housing Tourism multiply, as well as other projects of quality and distinction of a cultural and playful scope, or entrepreneurial initiatives that include the reinvention of handicrafts and the production of paper based on canes removed from vines at winter pruning (Pina, 2012, 2013). And how to ignore the growing Organic production, or the economic complement of olive and other fruit trees, indelible landscape elements in the landscape? Innovative examples are rising, complementing wine growing, in fact the economic underpinnings of the region, but progressively in a multi-functional framework.

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In this article we will look for the main parameters associated to the recent territorial changes due to the dynamics associated with the RT, presenting a brief regional framework to be followed by the central thematic analysis, rural tourism registered in the Douro Region. Following this introductory approach, we continue presenting some of the institutional bases within the RT, in a diachronic perspective, given its implications for the planning of the territory of Douro and its sustainable development (Cawley, 2012, Ferreira, 2012). We conclude with the exploration of an exemplary case that represents these dynamics and where the binomial wine growing / tourism is combined with innovation and landscape and patrimonial preservation. Thus, it is intended to assess the incidence of RT in the Douro Demarcated Region, as well as its potentialities and weaknesses.

2. Methodological bases

In order to achieve these objectives, in methodological terms we opted for the combination of several complementary methodologies, starting from a bibliographical and documentary research that has given us a picture of the regional framework where the wine growing, implanted in an exceptional landscape scenery, is emphasized. In this context, we complement the aforementioned documentary information with the statistical analysis that focuses on the wine growing (Recenseamentos Agrícolas de 1989, 1999 e 2009, INE), or in the Population Censuses (INE), in order to also frame the major regional problems of a demographic nature.

However, the main focus of this article focuses on the great regional strategic bet, tourism, with particular emphasis on Rural Tourism (RT). In order to do so, it was necessary to make an exhaustive survey of the existing tourist units, regardless of their typology, and then select exemplary cases for which it was necessary to design interviews and surveys that, after an initial exploratory phase to assess their applicability and

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reception by those responsible of tourist projects and other local agents, has been applied effectively. Thus, semi-structured interviews were carried out with those responsible for the RT units in the Douro region, obtaining evolutionary information on the farms where this activity takes place, the main characteristics and the evolutionary features of its vineyards and houses, or of another building of the farm in analysis; to the foregoing indications we joint the processes that support the restructuring and modernization of all the built heritage, while emphasizing the aspect that led to the bet on tourism and related activities. This information was obtained independently from the typology adopted in the state studied (Housing Tourism, Wine Tourism, Agrotourism, Rural Hotels, ...).

In this context, we perceive the characteristics and adaptations of these RT units, namely the architectural adaptations made, the main services and equipment available, etc.

But beyond the infrastructures, the human framework of support for these activities was also addressed, covering both the owner / responsible by the operation, the employees and the tourists. We always conclude this analysis by adding some perspectives outlined by the respondents.

Due to the high number of adherents, especially after the classification by UNESCO (Aguar, 2000), in this article we restrict ourselves to the first case of adhesion to Housing Tourism (HT) in the area of Douro, House of Varais, located in Lamego county, Baixo Corgo subregion. This example reflects the tenacity of a lady, the proprietress, who at the beginning of the 1980s, overcame familiar and external prejudices and obstacles, beyond financial ones, supplanting distrusts and cultural frameworks firmly established in society, particularly in the rural areas. In this context, we also obtained outlines about their expectations and motivations, as well as their perception of the impact of this strategic bet, not only in this heritage unit ("Quinta" and House of Varais), but also in the region, namely as a preservationist component of the patrimonialized landscape, but also an incisive part of local and regional development and in an optics where innovation and sustainability are unquestionable.

As a corollary, we adapted the script of interviews and surveys to other actors involved in local development, both institutional and informal (local and regional policy makers, as well as technical coordinators of tourism development), or the resident population. In this way, the various components of the planning and development of this territory were included, in a context where innovation is combined with the preservation of heritage, encompassing all social strata, in order to achieve a harmonious and responsible development of the region of Douro.

This work began in 2013. In Casa dos Varais, which holds a documentary archive that includes a file of all the tourists who hosted in this manor, it was done during 2016. Thus it was met the documentation for the analysis of this thematic where the field work was essential.

3. The Douro Demarcated Region, a heritage to valorize

Douro, a wine-growing region of world recognition, was created and regulated in 1756, following the establishment of the "General Company of Agriculture of the Vineyards of Alto Douro". It is located in the NE of Portugal about a hundred kilometers east of the city of Porto. Throughout its 250 000 ha, 45 000 ha of idyllic hillsides are planted with vines (IVDP, 2016).

Such a scenario developed on the hillsides boarding the Douro River and its main tributaries, presents a contrasting organization emerging when we moved from the west to the east, or when we ascended the slopes. This justified the creation of three subregions that are singular in economic, social, cultural, or even landscaping terms: Lower Corgo, Upper Corgo and Superior Douro (Figure1). We are therefore faced with a

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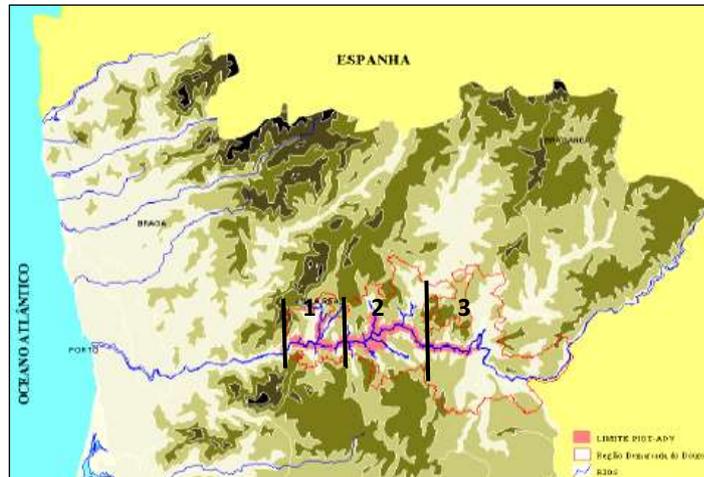




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complex but very appealing territorial mosaic, where the vineyards always stand out and the landscape differences (Figure 2), stand as something to be valued with a harmonious, sustainable development in mind.



- 1- Lower Corgo
- 2- Upper Corgo
- 3- Superior Douro

Figure. 1- The Demarcated Douro Region and its subregions (Plano Interm. De Orden. Territ. Do Alto Douro Vinhateiro,

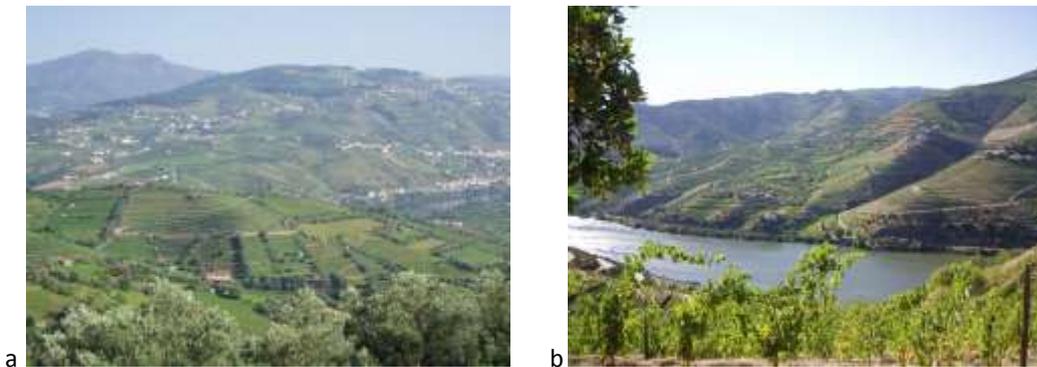


Figure 2 - Image of Lower Corgo (a) with the strong incidence of small farms with family structure and Upper Corgo (b) where large business-type farms are concentrated (photos of the authors).

The justification for these contrasts arises from a multiplicity of factors of anthropic origin, but also environmental and economic. It should be remembered, for example, that the strong slopes of the hillsides have only been overcome over the centuries by the action of men who, disintegrating the shale (Pereira, 2005), created a lithosol where the vines of autochthonous varieties were installed. To protect these vineyards from erosive episodes, terraces of different typologies have been used, giving rise to a unique, stunning landscape.

In terms of climate, Douro presents a Mediterranean one, in an environment where the hydric stress of vines is clear, but also the internal differences between the three subregions, with reflexes in the prevalence of vineyards (Rodrigues, 2011). In fact, if in Lower Corgo, the westernmost and wettest subregion, the vineyard has a long history (Pina, 2007, 2013), in the Superior Douro, as temperatures are higher and water resources

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are more scarce, the area occupied by vineyards was more restrained, a scenario that only changed after the 1970s, when the area planted with vines increased, replacing sometimes the olive and the almond trees, even now the most popular species in the Superior Douro (Lourenço, 2008).

But it is not only the natural framework that justifies the heterogeneous scenario presented in DDR. Also, its history and legal framework are based on visible differences, notably in the land ownership structure and, consequently, in the landscape, illustrating the impact of a severe subdivision of the properties that needs to be corrected (Pina, 2012 b; Pina, 2013; Abreu, 2012), in addition to a very dichotomous context, since despite a number of large business units, is unquestionably dominated by small-scale (more than 50% of farms have less than 1ha, with particular emphasis on Baixo Corgo), family-based holdings. This setting, deeply rooted in the Douro region, has suffered changes, particularly from the 1990s when the abovementioned dichotomy was aggravated, and the economic and social context was in sharp decline.

If we add that employment alternatives are scarce in the region, especially when we abandon the main tertiarized regional urban centers, it is no wonder that large migratory flows have been fostered, especially since the second half of the 20th century, which has favored the current demographic decline, remaining in the region only a population mostly aged and with scarce formation.

With an asymmetric implantation that always privileged the Low Corgo, different phases were registered. In fact, if population increases were very limited up to the end of the 19th century due to the succession of wine-growing crises and the proliferation of epidemics, the population subsequently increased, particularly in the regional urban centers, principally in the axis Vila Real-Régua-Lamego (Baixo Corgo). These increases continued until the 1950s, with the subsequent institutionalization of strong demographic recessions due to political, social and economic instability, which led to intense migratory flows.

Meanwhile, the populational declines were inexorable, especially in the Superior Douro, and at the beginning of the 21st century demographic reduction as well as the aging of the population was undisguised. Nonetheless, it is these elderly people who remained that, for the most part, coordinate family farms. This gives rise to problems of continuity of the activity of farms.

Another great constraint to regional dynamism arises from the deficiency of accessibility, a framework that persisted until the 1960s, since only then were the river and railways supplanted by highways (Dermendzhieva *et al*, 2011). In this context, it was facilitated the expansion of the vineyard progressively mechanized, replacing the traditional “*socalco*” (terrace supported by a stone wall), by terraces with earth embankments, or vineyards vertical planted. Regional wines and productivity were improved, autochthonous grape varieties were studied and better known in agronomic and oenological terms (Queiroz *et al*, 2010), but this in a very dualistic way, in opposition to the family tradition, the dominant, the business modernization, supported by ample financial and technical capital (Pina, 2007, 2012a, Andresen, 2013). This changed the landscape and the social life in the DDR (Lourenço, 2008). However, especially after 2001, there are new strategies for regional development that, without ignoring wine growing, the driving force in the region, are increasingly giving priority to tourism.

4. Rural Tourism (RT) and the development of Douro Region

4.1. Brief framing notes

Although the Algarve, together with Madeira, Lisbon and Tagus Valley, dominate the Portuguese tourist panorama, adding up about 75% of the activity, the North Region, although still weak, is registering a sharp

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increase. As a result, both the housing capacity and the number of overnight stays increased, moving from 9.8% of the national total in 2007 to 11.7% in 2014 (INE). However, only Porto region accounts for more than 40% of these households, while in the interior the figures are drastically reduced, providing that DDR in 2014 only concentrated around 7.4%. In terms of number of overnight stays, if in the North Region more than 70% are concentrated in the Porto region, DDR only registers 4.5%. On the other hand, although the private investment, in particular those registered in UE Program QREN (2007/13), also had an important influence in the Porto region, nevertheless in DDR we already registered 23.4%, when at the end of the last century it rarely reached 5.0% (Turismo de Portugal, 2014, AICEP, 2014). In addition, in the new UE Program, according to the "Action Plan for the Development of Portuguese Tourism 2014/2020 - Tourism 2020", the development of projects succeed. This is how the local accommodation, the RT in the Douro region, is appreciated.

A non-conventional tourism, RT corresponds to a "set of activities and services of accommodation and animation in enterprises of a family nature, provided to tourists in rural areas, in exchange for payment." It intends to offer the tourist the opportunity to revive local practices, participating in agricultural activities, seizing values and cultural and gastronomic traditions of rural societies, benefiting from their lodging and personalized hosting. In effect, we are faced with a typology of accommodation representative of the rural and cultural identity of the region where it is inserted, corresponding to an environmentally integrated offer and a tourist value of the region, since it should involve the various local actors (Turismo de Portugal, IP).

Activity with the main focus on medium-sized and large-scale winegrowing farms, tourism in rural areas, very often favors old manor houses in an attempt to revitalize them, as well as the associated wine-producing properties, increasing the income of agricultural producers, while invigorating other economic activities that are tributary to it and that interact (traditional handicrafts, production and sale of agricultural products, animation services, guides, etc.). In this way, an attractive landscape is strengthened, preserving and fostering authenticity and cultural interests.

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Modality of lodging that was established in the national space through Decree-Law 256/86, the RT associated with Agrotourism and Housing Tourism (Regulatory Decree No. 14/78), was only effectively regulated in 1986, especially the legal framework of 2002, but particularly for 2008. If in 1986 the RT only covered a limited number of typologies, in 2002 there were already several: Housing Tourism, Rural Tourism, Agrotourism, Village Tourism, Rural House and Rural Hotel (Decree-Law No. 54/2002).

In 2008, new legislation emerged (Decree-Law no. 39/2008 of March 7 and Ordinance 937/2008 of August 20), regulating the provision of these temporary accommodation services, with the following distinctions: HOUSING TOURISM (Establishment of a family nature, installed in old property of great architectural, historical or artistic value); TOURISM IN RURAL AREA (Country Houses, Agrotourism and Rural Hotels); NATURE TOURISM (accommodation to tourists integrated in classified areas with recognized natural values, having environmental animation, visits to natural areas, nature sports, environmental interpretation). Subsequently, given the emergence of new housing realities, Decree-Law no. 128/2014 appeared, later amended by Decree-Law no. 63/2015, which clarified some details and covered the new housing that emerged.

At the same time, financial instruments were created to support this activity, which in 2007-2013 was based on the "Operational Thematic Programs" and the "Regional Operational Program" which, combined with the "Rural Development Program" (PRODER), or "The Tourism Intervention Program" (PIT) and "Tourism Investment Credit" (banking protocols) enabled a broad expansion of RT in DDR. In the current scenario, various hypotheses of financial support persist, with PRODER continuing in UE Program PDR2020. There is, however, to highlight the "VALORIZAR" program, which covers tourism projects in the interior regions of the country, foreseen in the "National Program for Territorial Cohesion", for which an amount of € 10 million

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has been allocated. In this context and due to the existence of multiple regional tourist resources and a navigable waterway, the Douro River, especially after its classification by UNESCO, has emerged as a strategic tourist pole, with private investments of different types, but where the RT stands out.

In territorial terms, the RT had its origins in the early 1980s, with higher incidence in the Lower Corgo and, secondly, in the Upper Corgo. In the Superior Douro there was almost no expression. In the following decade, in turn, there was a great expansion, still increased after 2001, while the typologies diversified. At the beginning of the 21st century, however, there was a strong ascendancy of oenotourism and agrotourism, and in spite of the greater territorial dispersion, continued the enhancement of Lower Corgo (Figure 3).

These RT units begin by restructuring their vineyards, and then invested in tourism, supported by the combination of UE funds and own capital. In addition to the mandatory offer of accommodation, they provide various services such as meals and, more occasionally, SPA, swimming pool, tennis court or riding arena. However, the activities associated with wine growing including visits to wineries and vineyards, wine tasting and sale, participation in agricultural activities, all under a strong ludic aspect, stand out.

However, accommodation capacity is low (around 50% of the unities have less than 7 rooms), while a great seasonality is undeniable, since the preferential period goes from May to October, with a higher incidence during harvesting. This seasonality, however, is changing, as result of the adding by the landowner of the exploitation, in tourist terms, of the olive and the fruit trees to the vineyard and wine.

As far as the human framework for supporting activities is concerned, the landowner, in most cases male, aged between 40 and 60 (or more), has higher education that complements with others in the area of tourism and viticulture, a way to promote inherited heritage and the new activity. However, ladies are increasingly coordinating news projects.



Figure 3- Units of RT in the Demarcated Region of the Douro in 2016.

In this context, it revitalizes and preserves a superb heritage, while the landowners dilate and diversify their income. However, the social impact of RT is still limited, since the number of employees is reduced (usually 1 or 2 by unity), mostly female, with low instruction. For the specialized services, in restricted numbers, these employees are more and more obtained their training in the regional universities or polytechnic centers, and reside in the main counties of the region.

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4.2. The Varais House (Lamego, Lower Corgo)

Being the RT focused in the medium and large wine-growing states, often favoring old manor houses, revitalizing them, as well as the vineyards associated, we selected as a case study the House of Varais, located in the municipality of Lamego (Lower Corgo). Situated on the left bank of the Douro River, the Quinta and House of Varais boasts a long history. As an example, it is said that it would be the first property that was integrated in the patrimonial assets of the monks of "Order of Cister" in the Douro, in 1142, producing here the first "*Smelling Wine of Lamego*", today known as Port Wine (Cardoso, 2012). And if until 1773 Quinta dos Varais was dependent on the Convent of Salzedas, paying the annual revenues mainly in wines, has since remained in the same family.

Throughout its history, this farm has been recording several land and technical changes, albeit mainly since the eighties of the twentieth century. In fact, if in the area of viticulture the restructuring was carried out and consequent to the mechanization of the vineyards, in addition to the selection of grape varieties, in winemaking the winery was adapted using the old granite tanks ("lagares") as well as the warehouses, making them more functional and modern. At the same time, they initiated to produce and sell the first still white wine with the brand of the state, in the 1980s. In the 1990s they began to produce still red wines, and also Port Wine, all produced in granite tanks, with feet treading of the grapes, and later aging in wood barrels.

For its part, this property also underwent changes in its structure and size. However, let us limit ourselves to the 20th and 21st centuries. In fact, if in 1919 the farm owned about 7 ha where vineyards, olive trees, orchards and vegetable gardens existed. Subsequently, their owners acquired contiguous properties (1940/49, about 2 ha, 1950/59, plus 2 ha, in 1980 another 2 ha, in a state where there was a house of housekeepers). In this context, since 1980 the property reaches about 13 hectares of vineyards. Since the vineyard is the economic base of the region and House of Varais, one of the chosen strategies by the landowners was the renovation of the vineyards, applying for UE and national funds. The first renovation of 2.0 ha took place in 1980, followed by a further 4.9 ha in 1989 and a restructuring of 3.0 ha in 1993/96, and finally 2.0 ha more in 1999/2000. A renovation of all vineyards was completed in 2009/10, providing that all the vineyard was modernized and mechanized. At the same time, and also using UE and national funds, had been acquired vats, and different machinery for winemaking and grape production, including a filling bottling line. They also modernized the "lagares", having already in mind the tourism. In this context, if in 1987, 4 men and 2 women were needed to carry out agricultural work, in 2015 they were reduced to 2 men and 1.5 women.

In the meantime, the commitment to the RT was added as a complement to wine growing. There was indeed a need to expand and diversify the sources of income of the property, which is why the 60-year-old owner, in 1984, accepted the challenge of the Portuguese Secretary of State for Tourism who went to DDR to implement "Housing Tourism", given its potential, in the region. After a meeting between the politicians and the landowners of Douro, only D. Lúcia Girão, owner of Varais, accepted the challenge, overcoming reservations and obstacles installed both in the family and in the exterior environment. To create the conditions for tourism, she adapted the House using a subsidized credit, thus creating 3 rooms, to which one more was added in 2013. The Housing Tourism in the Douro was that way installed. Subsequently, in 1993, a new bet appeared, following the revitalization of the former home of the housekeepers. Unoccupied, it was adapted to "Agroturism", integrating perfectly the landscape. These way two types of tourism were installed in the Quinta and House of Varais: Housing Tourism (18th century manor) and Agroturism (former home of the housekeepers). Since the 1980s the son of the owners of Varais, João Azeredo, take in charge the responsible for exploring the state, including the touristic part of the business.

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What were the impact of these investments? The results of the research showed that the two types of tourism are mainly frequented by middle-aged / high-aged couples, aged 50 or over, mostly retired, although more recently the younger couples with 1 or 2 children, as well as individual guests, technicians related to the growing of vines and wine (traders, winemakers), or even journalists are very frequent. In fact, after 2001, the greatest affluence and interest in the Douro region was visible, which led to the creation of 2 permanent jobs, 2 women in Varais, but also occasional jobs when groups are received. To the tourist's diverse activities are offered including the participation in harvests, winemaking in "lagares", with the foot treading of grapes, commented wine tastings, visits to vineyards, wineries and warehouses, as well as itineraries in the region.

On the other hand, it was established an effective complementarity with other institutions (hotels, other farms, associations), facilitating the presentation of wines through the realization of a small Wine Fair, in which Cooperatives Wineries and other neighbor's producers participate. In addition, Varais offers the possibility to other farms of producing their wine, given the existence of modern technical facilities. This was a way of revitalizing the region's heritage and invigorate it.

5. Conclusion

Although the Douro Demarcated Region has a superb heritage and multiple potentialities, the problems persist. In strategic terms, vineyards and tourism, in their various aspects, are the key vectors for regional development, facilitating the preservation of the landscape in a multifunctional context. This way RT units are multiplying in the region, with examples representative of the various modalities, although we must highlight Oenotourism, Housing tourism and Agro-tourism. However, these cases have to be viewed in a holistic way, namely oenotourism, where wine growing is inseparable from landscape, culture, history, traditions and gastronomy. This requires coordination between economic operators and institutional authorities, the definition of local and regional strategies that provide effective management and marketing, but also the existence of innovative experiences that do not detract from local specificities, traditions and the regional culture, in addition to the complementarity between DDR and the surrounding area.

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In fact, regional development should be promoted in a harmonious and sustainable way, respecting local specificities and betting on the quality and conservation of the landscape and architecture, but also in society, by revitalizing handicrafts and other endogenous activities, by applying strategies that mitigate demographic decline. This way, these landscapes recognized by UNESCO, are dynamize, as was evident with the Quinta and House of the Varais, where, to the recovery of the vineyards, followed the revitalization of the manor house of the XVIII century, as well as another built heritage, in a scenario where the innovation combines with tradition, in a context where tourism is important, but without neglecting the vineyard and wine, the economic support of the region. In these strategies, the social network is not ignored, namely the residents, the effective preservers of this heritage.

It should be added that, although these investments in the RT are multiplying in the region, they are insufficient but, in fact, they make it possible to preserve historic buildings and their vineyards, in addition to having a social impact, given that, although limited in number and seasonal occupation (summer and fall), jobs are created. In this way, the investments are profitable, in addition to facilitating the diffusion of the landscape, history, gastronomy and local and regional traditions.

Tradition is thus combined with innovation in a trend that is sustainable

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- Acknowledgments: Work funded by the Fundo Europeu de Desenvolvimento Regional (FEDER) through COMPETE 2020 - Operational Program for Competitiveness and Internationalization (POCI) and national funds through the FCT, under project POCI-01-0145-FEDER-006891 (Ref.: UID / GEO / 04084/2013).
- The authors would like to give special thanks to the actual responsible of Quinta and House of Varais, Mr. João Azeredo

PATRONAGE:

