

Heritages' management and operative strategies on the Alto Douro Wine region, Portugal

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ABSTRACT:

The main objective of this work is to analyse the operative strategies of cultural landscapes such as policies, legislation/regulation, tourism, etc. The study subject is specifically, the landscapes that have strong rural and patrimonial characteristics. The main question is to assess if the used policies and initiatives are sustainable for the communities and local interests. Since 2001, the Alto Douro Wine Region has the UNESCO World Heritage status, and is thus regarded as a suitable case study that presents the opportunity to evaluate the pliability of the used strategies.

In order to answer to the goal stated previously, the used methodology has two main parts: i) a theoretical framework concerning cultural landscape narrative; ii) the analysis of the various documents and studies available related to the Alto Douro Wine Region, in the period between the pre-candidature until the present. It is a qualitative method based approach, providing the definition of guidelines that can be hereafter applicable on other cultural landscapes that are not classified by UNESCO.

CONFERENCE THEME: On Approaches: Ecology, sustainability, and changing societal and political economies

KEYWORDS: Cultural Landscape, Territorial Strategies, Sustainability, Alto Douro Wine Region.

INTRODUCTION

Over the years, the interest on *cultural landscapes* has increased amongst architects and urban or rural planners. Its significance has surpassed the disciplinary boundaries of cultural geography or landscape architecture. This fact can be explained by the social development and the inevitable territorial changes as a response to modern society demands.

The original view of landscape as a mere scenery by Cosgrove (AA.VV. 1988) has been replaced by the need to decode the various cultural signs, landmarks within landscapes, such as significant buildings. Therefore it is possible to view them as *texts*, more precisely – *hypertexts* (Ascher 2004) – narratives that can be read as a heterogenic whole and also as individual parts.

Various eras can survive in the same space and, consequently, cultural landscapes can be better understood firstly as space and secondly as a *mise en oeuvre* of time or as its immutable image (Marot 2006, 56-57). This immutability is somewhat paradoxical. How can landscape be viewed as a standstill frame of society? The collective memory, the traditional rites and the cultural identity are in fact the obvious answers thus unravelling why the cultural and patrimonial landscapes are relevant case studies. They represent an opportunity to showcase the past, the present and the future and, consequently, more versatile approaches: *le régional, le vernaculaire, les particularismes on cessé d'être passésistes; ils émergent à l'actuel et revendiquent l'avenir* (Berque 2000, 138).

In addition to the foregoing, the environmental and ethical issues also become relevant in this debate. The rural exodus, the desertification, the land abandonment, the destitution of identity by *globalization* (Singer 2004) and the *universalization* (Ricouer 2006) are some of the important aspects to be included in the design of territorial strategies. In the case of landscapes with strong patrimonial and rural characteristics, in order to be sustainable, they have to achieve an almost utopian equilibrium. Simultaneously, preserve and create the necessary tools in the territory for new dynamics and uses may occur, is crucial when one reflects on cultural landscapes.

This is somewhat conveyed by the reflexivity notion, that imply to think the territory in the past, present and future (Ascher 2004, 30). However, the adaptable reuse idea (Kincaid 2002) applied in

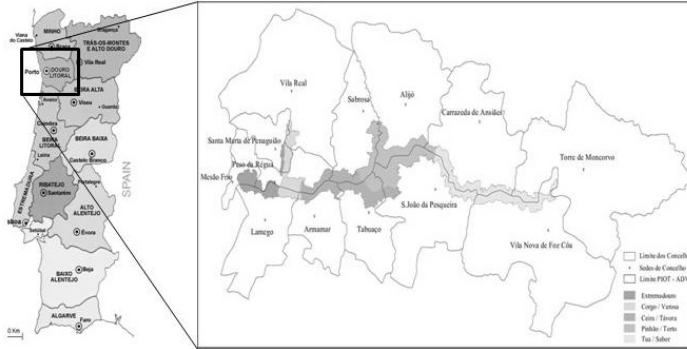


Figure 1: The Douro Region location and a zoom of RDD region with the defined area for the ADV region (PCM 2003).

buildings rehabilitation, is considered to have more explorative possibilities, which is nearer to this research purpose.

Analyse strategies that were designed specifically for cultural/patrimonial landscapes, such as the ones classified as World Heritages by UNESCO (1972), can be an important base for further considerations concerning the “active conservation” of cultural landscapes.

I. THE ALTO DOURO WINE REGION CONTEXT

The Alto Douro Wine Region (ADV – *Alto Douro Vinhateiro*) is an integrating part of the Douro Distinct Region (RDD – *Região Demarcada do Douro*), located on the north of Portugal (see Fig. 1). This landscape is composed by three major areas: *Baixo Corgo*, *Cima Corgo* and *Douro Superior*, and inevitably marked by the Douro River (see the zoom of Fig. 1). The cultural and wine based landscape, considered for UNESCO’s World Heritage category, has been built since the Marquis of Pombal¹ era, between 1757 and 1763. This fact alone makes it one of the oldest distinct regions in the world. Consequently, the collective memories and rites related to the wine production are inseparable aspects of this specific place.

In order to define the area most representative of the Alto Douro landscape character, the candidature to World Heritage was limited to the Alto Douro Wine Region.

However the remaining area of the RDD region was considered as a buffer zone of the ADV area. It was then stipulated that ADV region was considered an “experience” and its success would determine further experiments, extensible to the RDD region.

The ADV region is relatively homogeneous in its geomorphological and sociological dimensions. It was necessary to proceed to the specific surveys, mainly based on cartography, allowing to establish the various landscape characteristics: the soil use and respective maps, the biological diversity, the vernacular architectural elements (for example, the farms (*quintas*), where the owners of the wineries lived), the religious buildings and the different types of land use related to the wine production.

The composition of this specific landscape is obtained by three types of land use that still exist in an integrated way:

- Terraces built prior to the phylloxera crisis (see Fig. 2): Since 1863 and as a consequence of the phylloxera epidemic in the Douro Region, the old vineyards were continually abandoned or destroyed. This is translated in several extensions of land with dead vineyards – *mortórios* – which are still a part of the ADV landscape and layout. However, some of these old terraces

were rehabilitated for the re-plantation of vineyards and the old schist walls were preserved. These terraces still have an important role to play in the biological diversity of the landscape (Pereira 2001, 81).

- Terraces built after the phylloxera crisis (see Fig. 3): These terraces were built mostly in the end of the XIX century and in the mid 30's of the XX century, a direct consequence of the phylloxera plague that caused the European vineyard destruction. Therefore, the traditional grafting was substituted by the American grafting which was resilient to the insect. A new form of designing the vineyards was created. The landscape changed as well as the whole process of collecting the grapes; the application of zinc wire strings on schist walls replaced the *erguida* or *empa* (the vineyards were only sustained by the wood rods). The novelty was that the wood rods were attached on the strings as soon as the pruning season arrived (Pereira 2001, 84). The irrigation and drainage systems are also a part of the vernacular heritage in this particular landscape (Curado 2003, 256).
- *Patamares and Vinhas ao Alto*, a more recent form of terraces (see Figs. 4 and 5): In the 70's was developed the first model of patamar. It normally consists in two rows of wineries placed sideways to the contour lines and separated by a space of nearly two meters wide, where farm trucks can pass freely. However, this model is only recommended for 40% slope, and presents various problems when compared with the previous terraces. Its use increases the erosion risk, the growth of infesting plants, forcing more herbicide treatments (Pereira 2001, 85-86). In the last decades, more current models have been used, contributing to redesign the Alto Douro; however these are far from being the major process used in the various wineries territories. The fragmentation and the different kinds of social occupation of these territories, visible on the wine properties' dimensions and respective used techniques are important factors to understand the various types of the Alto Douro's wineries that invoke different eras and forms of territory occupation (Pereira 2001, 87).



Figure 2: Terraces before the phylloxera plague.



Figure 3: Terraces after the phylloxera plague in Valença do Douro. (Source: Miguel Flores, 2007).

These surveys reinforce the human effort and uniqueness of this particular landscape. The reaction to adverse morphological conditions and to the plague reveals the genius of a population and how this is connected to their collective identity.

The wineries (Quintas do Douro) – see Figs. 6 and 7 – are extremely important landmarks in the ADV landscape, as well as their buildings related to the wine activity.



Figure 4: Patamares in Tabuaço (source: Miguel Flores, 2006).



Figure 5: Patamares in Tabuaço (source: Miguel Flores, 2006). A new way of cultivating the vineyards, creating vertical lines, contributes to the ADV landscape layout.



Figure 6: The ADV region: an overall view. (source: Miguel Flores, 2008).



Figure 7: Quinta do Vesúvio Douro, one of the most impressive examples of quintas in the ADV landscape.

The religious buildings are not so expressive, scarcely placed on the territory, although the surrounding communities view them as significant landmarks.

All the data and the surveys anticipated a model of territorial management that would integrate all the different components that characterize the ADV landscape.

I.1.THE ADV REGION: TERRITORIAL AND PATRIMONIAL MANAGEMENT TOOLS

In the 80's, the Project for Rural and Integrated Development of Trás-os-Montes Region (PDRITM – *Projecto de Desenvolvimento Rural Integrado de Trás-os-Montes*) was developed and presented to answer to such problems as the handwork shortage, the decreased quality of wine trees, among others.

When Portugal became a member of the European Union, this region received important financial funds for its development projects, which contributed for the wineries modernization. However, the projects were focuses mainly economic factors such as the wine productivity. It was considered the risks to the region integrity but this was not the major factor.

The Intercity Plan of Territorial Organization (PIOT – *Plano Intermunicipal de Ordenamento do Território*) was designed with a different agenda; it is a tool approved by the Portuguese law – *Lei de Bases do Ordenamento do Território e Urbanismo* (AR 1998). In general terms, it was created to be an ensemble of guidelines (no-binding rules) to support an overall and integrated coordination – a common ground – in order to articulate the different and inter-dependent counties, despite their particular needs.

In the case of the Alto Douro Wine Region PIOT (PIOT-ADV) its primordial goal was and still is the preservation of the patrimonial landscape of the region. Considering the various interests and counties, were stipulated the following main objectives (Andresen & Curado, w.d.: 24):

- The definition of a global strategy for the protection and management of the cultural landscape that all the municipalities can participate;
- The articulation with other plans and programmes of local, regional and national interest;
- The analysis of all the intercity routes that structure the territory such as population density, infra-structures, transports and equipments;
- The analysis of all economic activities, particularly, social, environmental and economic dynamics.

The Plan was designed considering all the guidelines applied to the Municipal Plans (PDM – *Planos Directores Municipais*) and the dam reservoirs of Régua and Carrapatelo Organizational Plans (*Plano de Ordenamento das Albufeiras da Régua e Carrapatelo*). Related to the first mentioned plan it was analysed all the organizational charters, National Agricultural Reserve (RAN – *Reserva Agrícola Nacional*), National Ecological Reserve (REN – *Reserva Ecológica Nacional*) and their respective regulations, then allowing the territorial model design (see Fig. 8). This figure shows that agricultural activities (gray areas) occupy the major part of the territory, secondly, the natural spaces (white areas) and finally the urban settlements (black areas). The Douro River is represented by the line (see Fig. 8).

There are other no-binding tools concerning cultural landscapes management, similar to the existing Landscape Charters of Cataluña, Spain. They are supported by the existing vernacular architecture and heritage registers expressed by a “relevancy hierarchy” and environmental surveys among others, in order to catalyze a dynamic landscape (Preto 2009).

Simultaneously, it was created an Action Plan with regulating guidelines such as the promotion of the local heritage architecture and the ADV landscape as a whole, aiming its conservation. To implement these considerations and local PDM norms it was needed a regulating entity, designated as the Technical and Intercity Office (*Gabinete Técnico Intermunicipal*). However, this Office was of a

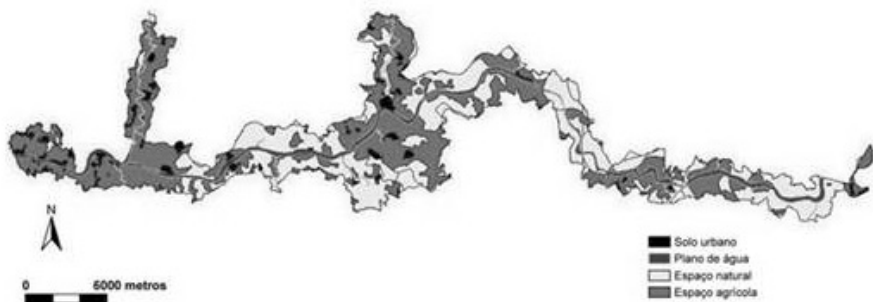


Figure 8: Territorial organization diagram (Andresen & Curado, w.d.).

short duration mainly due to the lack of funds. Between 2002 and 2005, the Office budget counted with the municipalities contribution with 25% funds and the Degraded Urban Areas Revitalization Program (PRAUD – Programa de Regeneração de Áreas Urbanas Degradadas) contributions with nearly 70% funds (AA.VV. 2001).

With the absence of this regulating entity, the PIOT-ADV struggled to survive to the different strategic points of view.

All municipalities joined efforts and demanded the clarifying situation, forcing the State to intervene and establish another entity with the same purposes as the referred above. Consequently, the Portuguese Minister Council has stipulated the following: the creation of the Mission Structure for RDD (*Estrutura de Missão para a Região Demarcada do Douro*) depending on the Environmental, Territorial Organization and Regional Development Ministry with the mission to reinforce and catalyse development actions in the Douro Region. It also has the responsibility to promote the articulation between the central and local entities of administration as well as stimulate the initiative and the participation of civil society (PCM 2006).

In this document they are also referred the competences of the responsible by this Mission (the President of Committee for Coordination and Development of North Region) in order to respond to the municipalities appeal, and it was nominated a representative for each of the intervenient entities.

The general plan includes the management of the various entities interests namely the Integrated Action of Territorial Base of Douro (AIBT-Douro – Acção Integrada de Base Territorial do Douro) and the LEADER+² program, reported and conducted by the Trás-os-Montes and Alto Douro University in 2003 (AA.VV. 2003b). The study refers the consequences and actions (legislation, creation of associations, etc.) concerning the ADV rural landscape.

The rehabilitation of the Salzedas Monastery benefited from the financing of AIBT-Douro and IPPAR, nowadays known as IGESPAR³. In several cases, it was verified that AIBT-Douro financed the second phase of rehabilitation works previously financed by the PRODOURO (a governmental program for regional development). Although, many historical centres were rehabilitated by its aid, this was not the original organization intent. The LEADER+ is referred as the one with the most potential to articulate the AIBT-Douro actions. However in some cases, it was verified the incompatibility of interests, almost competing ones, such as local products stores financing for instance, launched by LEADER+ and totally inadequate to the AIBT-Douro general agenda (AA.VV. 2001).

In fact the creation of partnerships must be viewed in the cooperation sense, conciliating the various factors concerning the landscapes management and the conservation of cultural assets. This is the reason why further and similar surveys should have been conducted and disseminated.

Actually and related to the wine production, an Iberian partnership between the Portuguese Office of Douro and Oporto Wine (IVDP – Instituto dos Vinhos do Douro e Porto), Trás-os-Montes University, etc. and Spanish entities (Technological and Agrarian Office of Castela and Leão and the University of Madrid) resulted in the *Suvidur* project. The project agenda is Douro's winery territories organization and the definition of non-obliging set of instructions allowing the agricultural activity maximisation. This experiment is currently taking place.

Theoretically, these initiatives contribute to the promotion of information and to data systematization, relevant when variety and numerous factors are in order. It is therefore a public service, the population is better informed and also an active way of management and knowledge.

The *Suvidur* project is complementary to the actual PIOT-ADV, with the scientific data exchange over the sustainability of the wine culture of both countries. The norms are related to ADV region and the Spanish *Arribas del Duero*, however, this fact does not imply that the identity of the Portuguese region is at risk (AA.VV. 2009). It is possible to understand the measures' focus on agricultural activities justified by its territorial expression however the related cultural heritage must be valued.

In 2001, the social and economical characterization survey of the ADV region municipalities (AA.VV. 2003b, 3) revealed the total ignorance of communities regarding the impact that the candidature could provide for them.

1.2. THE WINE CULTURE AS A STRATEGIC OPPORTUNITY

Besides the agricultural activity, the ADV landscape has the potential of being an important asset to cultural tourism, specifically rural tourism, a trend designated as Touring: *In Europe, the touring travels, in which are majorly integrated the tourism in rural environments, represent 44 million travels (about 18% of the Europeans leisure travels is included on this product). This touristic product has an important role in the design of the National Strategic Plan of Tourism (PENT – Plano Estratégico Nacional de Turismo (2007-2015)) that represents an increased trend in the order of 5 to 7% (AA.VV. 2008).*

The PENT (TP 2007) strategies focus on cultural heritage promotion and the creation of itineraries or cultural routes. The goal is to establish Portugal as a relevant competitor in this market segment. Touring demand is fuelled by the direct contact to local traditions and social rites in form of *agricultural tourism*, an approach that contributes to the sense of affinity and proximity to local communities. This is defined as a Software of Cultural Tourism Product, directed to conservation purposes (see Table 1).

In the case of communities with a strong agricultural base, this type of tourism has gained an increased importance. A significant number of farms (*quintas*) are part of the Wine Rout in the ADV region. The result is the region promotion by the Mission Structure and Douro Museum Foundation (see Fig. 9), operational since 2006, with free open-sessions to the general public, stimulating tourism, with activities as the wine tasting and farm tours, that otherwise remain closed to the public. It is important to refer that the Douro Museum is part, though a central one, of an integrated route of 11 museums, such as the Imaginary Museum in Tabuaço, open since January 2009.

Other initiatives have taken place such as *Caminhos Durienses* in 2001, with their panoramic sights tour promoted by the Northern Region Coordination Commission for Development (CCDRN – *Comissão de Coordenação e Desenvolvimento Regional Norte*) (Curado 2003).

The villages – *Barcos, Favaio, Provesende, Ucanha, Salzedas and Trevões* – were chosen in 2001 to integrate the *Programme Aldeias Vinhateiras do Douro*, supported by the AIBT and SPIDOURO. This programme has the goal to recover and invigorate a limited net of “reference villages” in the ADV region. In 2007, it was created a festival – *Festival das Aldeias Vinhateiras* – that celebrates local traditions related to wine rites supported by the northern regional operational programme within the National Strategic Reference Plan (QREN 2007-2013).

The strategy is clearly directed almost exclusively to tourism, in all referred shapes. The problematic is not new: the exhaustion of tourism as a resource, though valid, can paradoxically endanger the landscape (COE 2000).

In the case of the ADV Region, the strategy has been to develop and simultaneously preserve the wine activity with a clear investment in tourism. However, it is possible to affirm that the ADV region has been corresponding positively to its candidature purposes, with capable legislation, regulating entities and different partnerships.

MANAGEMENT ISSUES	HARDWARE of Heritage Site & Territory		SOFTWARE of Cultural Tourism Product		ORGWARE Agents and Organization	
Conservation vs. Tourismification	IN HERITAGE SITE SITE MANAGEMENT local	IN TOURIST DESTINATION DESTINATION MANAGEMENT regional	PRESENTATION & INTERPRETATION	TOURIST APPEAL & EXPERIENCES	PUBLIC & PRIVATE AGENTS POWER & INVOLVEMENT	STAKEHOLDERS LOCAL & GLOBAL INVOLVEMENT & INTERESTS
Conservation	Monitoring Physical impact Robustness - Fragility	Sustainable development of tourism infrastructure	Valorizing tangible and intangible heritage	Uses and affinity with the site	Awareness of sustainable tourism potentials	Inclusion & exclusion in decision making
Monitoring	Carrying Capacity	Tourist Space-use Patterns	Visitor centre - facilities	Visitor management	Business opportunities TOS	Connections & Disconnections Global - Local
Legislation					Ownership & Competition	Ownership & Stewardship
Development Local & Regional	Selection & Planning of Cultural Resources	Zoning & Clustering of TOS (Tourist Opportunity Spectrum)	Innovation & financial resources	Creativity & marketing	Motivation & incentives	Partnership

Table 1: Tourism Management Strategies (Jansen-Verbeke, McKercher, 2010).



Figure 9: Douro Museum, Peso da Régua (source: Ricardo Loureiro 2008)

2. CONCLUSION REMARKS

Actually, there are two significant tendencies of territorial intervention, concerning the heritage management (Veltz 2002, 10-11):

- The political strategies for the creation of various response models: although these strategies are based on the existent cultural assets, it goes beyond this aspect, anticipating future trends and productivities enabling the landscape autonomy and sustainability;
- Simultaneously, there is an awareness concerning the landscape conservation: different productive cycles in the major and potential sectors of cultural landscapes have to be considered.

Related to the first point, the PIOT-ADV plan has two major investment strategies already mentioned – agriculture and tourism – due to the wine activity common ground. These two activities are intertwined and support the landscape, and consequently, its communities. The question is: can it be a third window of opportunity, besides these otherwise obvious courses of action? The possibility of other viable strategies is a hypothesis that could be further studied crossing the data between these two sectors. The role of vernacular architecture in the communities as well as further dynamics, besides tourism, should be also explored.

Portugal strongly depends on European funds in order that many of this kind of projects can survive. It is also important to refer that entrepreneurship and the active participation of communities are real key factors in a management plan concerning patrimony. This is mainly achieved by partnerships between the public and private sectors. This is not always consensual though theoretically it should be.

Related to the second point, the ADV region has been, despite some problems along the way⁴, regulated by public entities from the GIT to the actual Mission Structure.

The ADV safeguard is built on people's awareness through education, so the local communities can understand and live the plan in its real significance.

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ENDNOTES

¹ Sebastião de Carvalho e Melo, Marquis of Pombal (Marquês de Pombal (1699 -1782)) as a prime minister was responsible for important public reforms, in various departments, from education to economy. He is also known as the main character in the public design of Lisbon downtown after the earthquake on the 1st of November of 1755 (Oliveira, 1990: 418).

² The LEADER+ program is a tool that allows experimenting diverse approaches concerning interventions on rural landscapes, respecting the environmental, economical, social and cultural aspects of rural territories. The LEADER+ program underlines the importance of local conscience, their identities and landscapes self worth. Consequently, it was created the conditions for the skills acquirement so the local communities have an active role and intervention. In April 14th, 2000, the European Communities Committee adopt, in according with the stipulated in the European Regulation (CE, 1999), the guidelines related to the rural development and local initiative promoted by LEADER+ (EU 2000). The LEADER+ program is a local initiative, financed by FEOGA-Orientation and by public/private entities. It is most active when combined with the Local Action Groups (GAL – Grupos de Acção Local) and the main goals are valuing the natural and cultural heritage, the economy reinforcement, creating jobs and the aid to local organizational abilities (AA.VV. 2003a).

³ The Instituto da Gestão do Património Arquitectónico e Arqueológico (IGESPAR 2009) is an institution, result from the merger (MC 2006) between the Instituto Português do Património Arquitectónico (IPPAR 2009) and the Instituto Português de Arqueologia (IPA 2009). It incorporates some of the attributions of the Direcção Geral dos Edifícios e Monumentos Nacionais (DGEMN 2009), meanwhile extinct. It's a public institution, indirectly administrated by the State, following the attributions from the Cultural Ministry on the sphere of cultural, architectural and archaeological patrimony. The focus of this entity is monuments preservation and the promotion of routes and tours in natural landscapes such as Fôz Coa. Despite this fact it was acknowledge the dissociation between landscape and monuments, a key factor to promote and protect cultural landscapes that must be viewed as a whole with a holistic approach (Oliveira & Ribeiro 2010).

⁴ Besides the already mentioned problems concerning the establishment of a normative entity, the fact is that ADV region struggled with other questions. In 2007, it came to the general public that ADV region could lose its UNESCO World Heritage status because of the major illegal dumps in the protected area. In 2010, this is still a problem. Consequently, the VALOR DOURO project was created to recover the fluvial landscape, supported among others by the Mission Structure. The causes are attributed to the lack of civic spirit and lower local education.