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**УСТОЙЧИВИ ПРАКТИКИ ЗА РАЗВИТИЕТО НА ВИНЕНИЯ ТУРИЗЪМ В
ПОМОЩ НА МЕСТНАТА И СОЦИАЛНА ИКОНОМИКА
SUSTAINABLE PRACTICES FOR THE WINE TOURISM DEVELOPMENT IN
SUPPORT OF THE LOCAL AND SOCIAL ECONOMY**

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Abstract

The paper focuses on several scenarios for sustainable tourism that can be resourcefully applied to the field of wine tourism as a kind of special interest tourism. Firstly, we start with a short analysis of different examples of sustainable tourism i.e. trekking, green transport (part of the green deal) associated with modern wine tourism. Secondly, we delve on the aspects of social entrepreneurship. The examples are best practices in developed tourist destinations, like Italy, Slovenia, Hungary. Thirdly, we elaborate why stakeholders may profit from a discernable added value of wine tourism, thanks to social ventures and the advantages of social entrepreneurship as a way to ensure sustainability for the local communities, comfortable experience for the tourists and shared welfare for all stakeholders.

Key words: sustainable wine tourism, enotrekking, social innovation, local community, tourism social entrepreneurship

Резюме

Статията се фокусира върху няколко сценария за устойчив туризъм, които могат да бъдат приложени в областта на винения туризъм, като специализиран вид туризъм. Първо, започваме с кратък анализ на различни примери за устойчив туризъм, т.е. трекинг, зелен транспорт (част от зелената сделка), свързан с модерния винен туризъм. Второ, акцентираме върху аспектите на социалното предприемачество. Дадените примери са добри практики в развити туристически дестинации като Италия, Словения, Унгария. Трето, разясняваме защо заинтересованите страни могат да се възползват от високата добавена стойност на винения туризъм, благодарение на социалните начинания и предимствата на социалното предприемачество, като начин за осигуряване на устойчивост за местните общности, удобно изживяване за туристите и споделено благоденствие за всички заинтересовани страни.

INTRODUCTION

Enotourism tourism has been developing towards the Sustainable Development goals (SDG) even before 2020, by seeking to serve the best interests of all involved actors. The evolution at the heart of the new flourishing practices has indeed gone „beyond the table setting” (UNWTO, 2016) or the obvious business interests of producing and processing firms. The chosen examples of recent development demonstrate a logic towards more benefits for the local communities and the visitors alike. The Italian best practices in the paper are testimony for an already evolving approach towards enotourism as a corrective mechanism after the financial crisis (2006) and gravitate towards entrepreneurial decisions for the local community or towards the combination of sustainable practices or ecotourism with traditional enotourism. They are also related to wines known only locally and produced on a small scale. Some cases from Slovenia and Hungary are added as an example that this type of tourism evolution is not rooted only in one country. Another reason to include them is the main scope of the article, namely to accentuate the link between the green deal goals and social entrepreneurship, for a viable wine tourism agenda, that is locally efficient and not mere copy-cat dissemination.

Regarding the SDGs and wine tourism a conference in Georgia (UNWTO, 2016) has not only stated that enotourism is a fundamental part of gastronomy tourism, able to foster sustainability, but also called for „public and private partnerships with an emphasis on local entrepreneurship within the tourism value chain, while taking into account the authenticity of destination.” Seven years later, the most important wine destination might be aligning themselves to these declarations, motivated by the challenges for tourism in the last decade. While enotourism was neatly positioned as a kind of special interest tourism, usually associated with gastronomy tourism (Marinov and Koprinarov, 2010) , its suppliers have adopted more sustainable (UNWTO, 2016). Green tourism practices like trekking, attention to the ecology or even green transport are associated with wine tourism with increased regularity. The SDGs were already a consideration within special interests tourism, thanks to local production, shorter supply distances, biodiversity preservation and inclusivity (UNWTO, 2008). Because of difficulties experienced after the pandemic in 2020, enotourism is now radically shifting towards the Italian concept of *esperienza 360°* or a 360° experience (Nomisma, 2022 a). That rather encompassing offer is centered not only on the comfort of the canteen experience, but it integrates the sustainable goals for local heritage and local community adding to them a further emphasis on green economy and a focus on the touristic experience within a natural scenery. These examples are not simply best practices to be copied, but a possibility for social entrepreneurship.

EVIDENCE AND METHODOLOGY

The methodology of the article is firstly, to pinpoint the structural elements of the new trends in wine tourism and its overlaps with sustainability developments; secondly to grasp the pattern in these cases; and thirdly to discuss viable models for social entrepreneurship at local level.

The European Green Deal is in line with the SDGs (UNWTO, 2021). While accents set on a policy level are related to „a strong commitment at local level” (EC,

2020b) within the four dimensions of environmental sustainability, productivity, fairness and macroeconomic stability (EC, 2020a). Local production, shorter distances, biodiversity and inclusivity had manifested themselves through wine tourism entrepreneurs in Italy already after the financial crisis in 2006. In 2022 the Italian wine association *Città del Vino* is reporting that the top answer for the question *What is the new enotourism?* is „Multifaceted „package“ experience that includes wine and territory at 360 °” (Nomisma, 2022b). It is a fusion of wine with culture, well-being, and sustainability. Activities, beautiful scenery and measures related to health issues like open air gatherings in small groups are blended into an immersive experience. In fact, the main difficulty for wine tourism in Italy past the pandemic is the absence of suitable places for wine tasting or the difficult access to the premises (Nomisma, 2022a).

The first example is the Amalfi coast, where producers of small quantities of historic wine organize wine tourism routes and are acting as a trader for their own community offering other local products: fruits, homemade jams, specially ordered local ceramics (Pinatoro, 2008). One of them is a canteen with more than 30 years of wine tourism practice *Marisa Cuomo Winery*. In 2021 it was ranked as „the Canteen with best sea view in Italy” (Guolo, 2021). The accent on the local community is staggering, with „121 local families gravitating” around the enterprise. *Scenery and wine are integrated in this offer of „historic i.e. pre-filossera vines, using the pergola farming method, creating a landscape element of strong appeal”*. The brand name for that wine production is „*Vini Estremi*” (i.e. *Extreme Wines*) or *heroic wines* (Marisa Cuomo, 2022). Another main focus of the offer are trekking routes around the coast of Furore. The core concept is an immersive experience centered around the Amalfi scenery, but also a fusion of modern facilities and local and natural heritage.

The second example is from Tuscany, with the term *Entrokking* within the subsidized by the trust Monte dei Paschi di Siena project *Senarum Vinea*, which is an experimental wine route intended for valorization of the historic vineyards of Siena, 2007-2013 (Cittadelvino, Urban Vineyards Association). The emphasis of the project are old types of wine, safeguarded for local production within gardens close to the city of Siena e.g. in old monasteries. It is a wide collaboration between actors from NGOs and the academia (cultural heritage, manuscripts, biology, chemistry, vine genetics), as well as with different local communities or owners of small urban gardens. The green deal arguments are prominent within *Senarum Vinea*, restoration of local biodiversity, and balance. The result again is oriented towards landscape and etruscan heritage, or the *pergola*, as well as towards the identification of 20 local historic local vines. The direct result for tourism is a conservation field with newly planted historic vine stocks, as well as a smartphone app for enotrekking. The term is also used as a brand name for an immersive experience while visiting Chianti vineyards (Expedia, 2022), or a guided explanatory walk in the vineyards plus wine tasting (Tenuta Moriano, 2022).

The third example is from Cinque Terre. Zanichelli (2019) is writing about another possibility for 360 ° wine tourism on the slopes of historic vineyards. The focus is on the immersion of the senses in the coastal area. The very difficult access to the wine terraces here has been turned into an unique advantage, where *the*

monorail (small cog wheel train) is used for transportation. Landscape contrasts, and even the exotic scent of the vegetation are integrated into the canteen visit. The monorail is part of packages for visitors volunteering to maintain the dry stone walls of the terraces in exchange for private hikes, as well as access to original local products and to the local lifestyle (Mallory, 2020). The term of reference here again is „heroic winemakers” as a password for social entrepreneurship. A more traditional wine tourism offer to the Cinque Terre might include train transport to the area, wine and trekking (Evolution Travel, 2022).

The fourth example is about an entrepreneurship from Calabria with the brand name Statti, that is oriented towards sustainable wine tourism. An old family estate, focusing on the *Enotria Tellus* traditions (Statti, 2022). With 100 hectares of vineyards, 300 hectares of olive groves and 50 hectares of citrus groves, the estate is also equipped with photovoltaic systems and is placed in beautiful scenery. The wine tasting of a tourist group is always guided, with explanations of the role of the enterprise for the local community, as well as the account of the closed cycle of the production, where nearly everything is reused. For example the end product of the grape pomace is a biofertilizer, fruit kernels become pellet fuel. The visits are not so much focused on sales, but on image, and the initial investment is also part of the historic entrepreneurship of the family oriented back to the local community (Statti, 2022).

Part of the 360 ° wine tourism offer is the method of displacement. While it can be a rambling, or even a monorail. In Slovenia wine tasting and vineyard sights are part of the Parenzana transborder bike route advertised by the Slovenian Tourist Board (Slovenia Outdoor, 2022). The Vipava bike tour seems to be dominated by a landscape full of vineyards, as well as by picturesque wine tasting and discovery by bike (Vipavska dolina 2022). Again there are possibilities to use smartphone routes, indicating some degree of free access to the vineyard hills. The bike tours there are regional, with many Italians regularly crossing the border for trekking or culinary activities. In Hungary wine tourism is also more and more often associated with nature and scenery. The yearly Hot Air Balloon Festival in Ócsényi, typically brings out the locals to the hills of the wine producers, with accessible tracks within the vineyards of the hilly Szekszárd backcountry. In 2022 there are *Walk & Wine (Séta és bor)* offers in Hungary proposed by wine producers (Orsolyák, 2022), as well as a smartphone app for *Országos Bortúra* or National Wine Tour (Bor és Piac, 2022).

RESULTS AND DISCUSSION

The discernable patterns of the enotourism best practices that transpire are several. One feature is that wine tourism is now related to activities. Thanks to the concerns for the well being and health of the visitors, the wine tours are now even more oriented towards boutique tourism with small groups and in the open air, preferably at a terrace with breathtaking views. A further aspect of the reinforced sustainability of the wine offer is the conscious offer of local wines for visitors who do not have to travel a very long distance, or who can use some kind of greener transport (train, bikes, electro bikes). The community interest is very well represented, not only by the care for the natural environment and its protection, but also by the inclusion of different local products, even wines offered by other

producers. Beloved are wines not deemed for export, produced in small quantities and with history. Part of that trend is also the positive branding of the new enotourism as *enotrekking, walk and wine, heroic wines, extreme wines and 360° experience*. Each element of the wine production, even the access to the terraces or the manual work can be blended into these immersive experiences. Services and products are more and more complex, rooted into local customs and oriented towards fine details and understanding of the visitors. These packages depend on the cooperation of many actors and often include social entrepreneurship. Public funds or local businessmen invest funds, but by enhancing the network of academia, NGOs and other entrepreneurs, so that the benefit will be mutual. Working places are maintained, work morale and comfort, too. Digital apps are used for information dissemination or instead of a guide, yet guiding in person is still the highest priority for sustainability and passing on the positive image. The mix of natural scenery, open air and other oriented towards better health measures are elegantly integrated within the wine tasting experience.

Bulgarian Social enterprises in tourism. Actually in Bulgaria a Social enterprise, The Social Teahouse, located in Varna, is selling a limited brand wine Merlot „Teahouse”, produced in the village of Sava, Dalgopol, through The Social Market (The Social Market, 2022).

At now there are three Social enterprises, registered in the Registry of Social enterprises in the Ministry of Labour and Social Policy of Bulgaria with social activities in the field of culinary tourism (ET Rukia Izirova-Orhideya, located in Petrich), a social innovation enterprise for accessible tourism for disabled people („Social enterprise Social Travel“ EOOD, located in Sofia), and an enterprise for tourist services („Time Travel EOOD”, located in Ugarchin).

The Social enterprise for tourism „The Sun Farm” is organizing Summer fun for kids in a farm, located in the village of Tankovo in Rodopi mountain (The Sun Farm 2016).

Social enterprises in tourism. Alternative approaches to tourism development are arising, where the local communities are at the foreground of innovative tourism entrepreneurship and development strategies. The social enterprises operating in tourism are engaging disadvantaged and underdeveloped communities sustainably through the industry. Tourism social entrepreneurship is a market-based strategy to address social problems to local people for sustainable community development. A conceptual framework for community development, generic social entrepreneurship, and community capitals perspectives, are proposed in Aquino et al., (2018).

Social enterprise projects evaluation is based on establishing of effective performance measurement methods and processes to justify the investment of resources and time committed to such activities. The goals of tourism based social enterprises are poverty alleviation, empowerment of local communities, and improved livelihoods for marginalized from mainstream tourism economic activities. Social enterprise projects involving community participation may be better positioned to achieve their developmental objectives by incorporating the principles of Participatory Evaluation and Empowerment Evaluation in tourism for human development (Daye and Gill, 2017).

The Social enterprises practice responsible tourism through contributing to poverty alleviation and environmental protection while being financially self-sustaining. They are using a market-based approach in balancing commercial and social/environmental objectives. Touristic social enterprises operate similarly to other sectors, with a clear preference for three „Alter” models, depending on the type of activity: Service Subsidisation, Employment and the Market Intermediary Model. Success factors are valid across all social enterprises in tourism, irrespective of primary business activity or operational model. A combination of factors such as leadership, strategy and organizational culture guides the implementing mechanisms of processes and structure, human resources, financing, governance, performance measurement and marketing. Success factors are strong leadership, clear market orientation and organizational culture, which balances financial with social/environmental aims, the need for a good product to market (von der Weppen and Cochrane, 2012).

Advantages and Benefits of Social Tourism. Tourism Flanders made „Tourism for All” a decree in 2003 to making holidays possible for the people without access to the commercial holiday circuit.

In France, a government scheme Chèque-Vacances has helped 6.3 million people with low incomes to take part in social tourism, support distributed exclusively on the basis of social criteria to the employees of all private and public companies.

The holiday support system is also in practice in other countries such as Switzerland, Hungary and Italy.

In addition to the social benefits to disadvantaged people, social tourism also boosts the domestic tourism industry and creates more employment and investment opportunities.

Thus, according to a PricewaterhouseCoopers evaluation, the Spain government invested around €125 Million/year in the IMSERSO scheme – a holiday subsidy project, but for every €1 of subsidy received €1.5 in extra as tax receipts, saved the cost of the Spanish health service sector, and provided employment to around 80,000 people (Future Market Insights, 2022).

Social enterprises in wine business and tourism. Hosts can’t just accommodate, feed, transport or amuse their guests but must stage manage a diverse set of information and sensory rich experiences that involve higher levels of guest participation and engagement. When incomes had risen sufficiently for the general public to be able to afford wine with the occasional meal, vineyards were able to supplement their income with wine tastings and a retail outlet (Pollock, 2022).

A wine brand 27seconds that has been established in 2017 to achieve both social and financial goals, fulfills the definition of a social enterprise. While the initial success of the brand owes a great deal to the owners, the groundswell of industry and public support for this endeavor, and the strong sense of pride and community interest, has been achieved in part due to the opportunity 27seconds offers to drink good wine while supporting a charitable cause (Fountain and Forbes, 2020).

The concept of sustainability what actually means to wine consumers, whether wine consumers mention the social dimension when they describe what sustainability means to them, and whether social sustainability is important to them.

Data on French and Italian wine consumers was collected using an online survey (Capitello and Sirieix, 2020).

Philanthropy is a growing practice in the wine industry. Wineries are motivated to engage in philanthropic activities, leading to decisions about the ways to communicate philanthropy to stakeholders (corporate social responsibility communication). An examination of philanthropically active wine firms about their communication actions to stakeholders was health, and quantitative data were collected from wine firms in France, Spain, the USA, Australia and New Zealand, based on an online questionnaire (Fernández and Aboah, 2020).

The social enterprise trend now reached the wine business. Wine for the World is a triple bottom line (people, planet, profit) enterprise to change the way people think about wine, joining winemakers from the U.S. and developing countries to open the market to new wine regions abroad, and thus to contribute to development. U.S. wine drinkers support development by explore with new wine regions, and create powerful change, because up to 25% of all global wine is produced in developing countries. An increase in the U.S. sales of wine with 0.2% could translate into over 100 million dollars in few years for an emerging market such as South Africa, Uruguay, or Moldova. Some of these ethical, sustainable, and fair trade products are marked by certifications such as the IPW, WIETA, and Fair Trade USA. Wine for the World has employed a 'collaborative' funding strategy by launching a crowdfunding campaign on the online funding platform Indiegogo.com to involve consumers with the process of creating change in the industry, and inciting interest in the type of grapes used in wines (Scarlet, 2013).

All these good practices in Tourism social entrepreneurship, could be further developed in Bulgaria to increase the accessibility of disabled people and low-income workers to touristic services in principle, as well as economic stimulation of the local community and farmers.

CONCLUSIONS

The trend of boutique wine tourism may have well spilled over a new trend for a more sustainable wine tourism. While the reason for that development seems to be related to financial hardship and different crises in tourism, it is a positive development in line with the SDGs. The result is an offer that is oriented towards small groups, personal attention, walking access to the vineyards, interpretation and the exclusivity of the local products that are tasted in a way emulating the original traditions of the region. To offer these services and products entrepreneurs have to tap into their respective unique and local advantages. Be it the genetic restoration of an antique vinestock or the wonderful scenery, the access to the natural habitat of the vineyards, the success of any similar model lies in the cooperation of all shareholders and the preservation of the benefits for the local community. Social enterprise establishment as social innovation in Bulgarian tourism, and especially in wine tourism, could be a driver for future community economic development and best perspectives for local community.

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