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The Wine Routes as an Instrument for the Valorisation of Typical Products and Rural Areas

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Contribution appeared in Arfini, F. and Mora, C. (Eds.) (1997) “*Typical and Traditional Products: Rural Effect and Agro-Industrial Problems*”, proceedings of the 52nd EAAE Seminar, pp. 213 - 224

June 19-21, 1997

Parma, Italy



**UNIVERSITA' DEGLI
STUDI DI PARMA**

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*Typical and traditional productions:
Rural effect and agro-industrial problems
52nd EAAE Seminar - Parma, June 19-21 1997*

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ABSTRACT

The South European countries are greatly involved in the policy of rural development of the EU and are engaged in finding new instruments for rural policy.

Accordingly this paper intends to analyse the experiences of one of the most interesting examples of integrated development: the wine routes.

The phenomenon is already well-established in the rural and thematic tourism of the typical wine-producing areas of Northern EU countries. The first wine routes in Germany date back 60 years. In France the wine routes began 40 years ago. In the Southern countries the wine routes have been developing over recent years and have been proposed as an instrument of the valorisation of POD wines areas, the creation of new job opportunities and increase in revenue for wine farms..

1. The current situation and the evolution of the rural world: the problems to be solved

Rural environment is defined, in the Commission's paper on the future of the rural world [6], as an economic and social fabric comprising a series of heterogeneous activities: agriculture, crafts, small and medium-sized enterprises, trade and services. Such a definition goes well beyond being a simple geographical delimitation and emphasises the complexity of the structural organisation of the various sectors in this environment. The changes over the last few decades which have most directly affected the rural world are related to the decline in and the profound restructuring of the agricultural sector whose importance economically, and in terms of employment, has been drastically reduced. Even so there remain ample margins for production adjustments at a community level as the diminished area dedicated to agriculture and the reduction in labour are more than compen-

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sated for by the modernisation and intensification of production, which have caused there to be ever greater levels of over production. The process of modernisation has not however been uniform over all of the regions of the Community, with serious consequences as regards differentials in farming incomes and the development of farming structures. In particular there are areas which, possessed of the capacity to adapt to the new reality, have continued to prosper, while there are areas which are unable to adapt and develop new functions and activities which can replace or are complementary to agriculture and these have been subject to a spiralling economic and social decline to the point of becoming areas which are no longer very attractive and subject also to depopulation.

Also at a general economic level it should be noted how the trend towards economic and social diversification has occurred with varying intensity as between different rural areas, characterised almost everywhere however by problems of delay which are of a structural origin. For this reason strategies for the diversification of rural economies must be more centred on the potential for endogenous development, seeking to find structural solutions to the difficulties of setting up secondary and tertiary activities, identified in being far from the decision-making centres, in the lack of risk capital, in the difficulty in having access to information and technological innovation, and in the absence of adequate services and in a lack of an integrated economic framework.

Analysis of these underlying trends in the rural world and of the specific nature of individual regions requiring agricultural restructuring and/or economic diversification, have contributed to the outlining of a community policy of rural development aimed at ensuring the passage from an agricultural economy which can no longer ensure a normal standard of living for large parts of the population, to an integrated economy founded not only on agriculture, but also on non-agricultural activities and on multiple activities of the farmers. Financial assistance by the structural funds, which are the main instrument for carrying out the Community's rural development policy, has a fundamental role to play in this regard.

2. The rural development policy and the reform of the structural funds

The reform of the structural funds, which was decided on by the European Council in February 1988 and the successive revision of the funds regulation in July 1993, identifies the general principles upon which the structural policy programmed up to 1999 is based:

- *the geographical and financial concentration* of structural intervention;
- the detailed *programming* of these through Community Support Frameworks and Single Programming Documents (SPD);
- the *additionality* of community intervention and that of aids at national level in the areas in difficulty;
- the *partnership* between the Commission and all competent national, regional and local authorities designated by each member state, at every stage of programming;
- the *evaluation ex ante and ex post as well as checks on* any intervention by a supervisory committee availing itself also of independent outside experts;

In particular, the principle of concentration is to be found, at a geographical level, in the definition of both regional and horizontal structural objectives, which identify groups of regions which have the same kinds of socio-economic problems in common.

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Within the framework of the high priority objectives, the development of the rural world is explicitly addressed by objective 5b¹, the aim of which is precisely to promote rural development by facilitating the progress and structural upgrading of these areas. However the majority of the regions which come within objective 1, the aim of which is to favour the development and the improvement of the structures in those areas which have been slow in developing, are typically rural in nature. Such areas are characterised by modest overall economic performance² and are highly rural, as it is also visible in the high levels of dependence on agriculture. In addition to intervening directly to help rural areas in the context of these two objectives, the Community also contributes to their development through the Community Initiative Programme LEADER which promotes rural development projects based on endogenous resources, i.e. conceived of and run by local people in the rural environment. The scheme was launched in 1991 with a starting fund of 450 million ECU (LEADER I) with the aim of bringing out the potential inherent in the local rural areas. It is continuing in the 1994-1999 period as LEADER II, making a total of 1.4 billion ECU available to regions which fall within the objectives 1 and 5b.

As far as the finances through which the community policy for rural development are concerned, all the structurally aimed funds, i.e. European Regional Development Fund (ERDF), European Social Fund (ESF), European Agricultural Guidance and Guarantee Fund (EAGGF) Guidance section, are involved with intervention which, in accordance with the revised funds rules of 1993, must be programmed in such a way as to guarantee that the sought for rural development is at one and the same time *endogenous, sustainable and integrated*:

- in order that the development pursued be *endogenous* the rural development policy must aim at full employment and growth in the productivity of local resources by means of acts of external intervention which, as integrated and adapted to the initiatives and particular specific interests of the area for which they are destined, are able to ensure lasting growth;
- the *sustainability* criterion requires that the intervention be such as to achieve balanced and dynamic development in the rural areas of the Community, with respect to rural, social and environmental functions, thus also requiring that the actions be decided on the basis of sectorial and territorial planning to ensure full integration of all environmental;
- the *integrated approach* to rural development is achieved when more than one structural fund is employed in a particular area, and where these funds are in strict co-operation between each other (multi-funding) and work on a number of different levels, i.e.: a financial dimension, meaning co-ordinated intervention from different funds, an economic dimension, requiring that the various measures are mutually reinforcing and involve all economic sectors, and an administrative dimension, which means tailoring the intervention to particular local needs, by working in harness with the national, regional and local administrative structures in the working and carrying out of operational programmes.

¹ The rural areas which may benefit from Community intervention under objective 5b, are characterised by a low level of socio-economic development and satisfy at least two of the following three criteria: 1) a high level of agricultural employment as part of the overall job situation, 2) low agricultural incomes, 3) low population densities and/or a generalised tendency towards depopulation.

² The criterion for the selection of the objective 1 regions is where GNP per head is less than 75% of the Community average.

3. The rural development programmes and objective 5b

The programming of intervention related to rural development, within the framework of the above objective, falls into two distinct periods, as indeed it does for the other high priority objectives: the first a five year period following the structural funds reform, extended from 1989 to 1993, and the second of six years starting in 1994 to finish in 1999. On the basis of the rules laid down by the general regulation 2052/88, in the 1989-1993 period 44 Community Support Frameworks were approved for the development of rural areas under objective 5b. The action was taken through the ratification of 73 Executive Programmes involving 50 regions in 9 countries³, covering 17% of the community territory and 5.1% of the population, i.e. about 16.3 million inhabitants. A total of 2.978 billion ECU were used for the purposes of objective, which corresponds to around 5% of the total structural funding. As for the new programming period 1994-1999, by the revision of the funding rules, made in July 1993, thanks to the partial change contained in the general regulation 2081/93, it has been possible to increase, as compared with the previous programming period, the extents of the rural areas eligible for help under the above objective. It has in this way been possible to adopt 76 SPD, so that the objective 5b population has risen from 5% of the community population in 1989 to 8% in 1994. Respecting the concentration principle in the face of an increase in overall territory and of the population receiving assistance, the resources made available for the objective have been increased such that, in the new programming period, funding levels for this objective have reached a total of 6.5 billion ECU, which is twice as much as in the previous period.

The programming methods for the intervention financed in both periods have taken the integrated approach to rural development as their reference point, favouring a concentration of effort in the revitalisation of rural economies and the permanent settlement of local population. The main elements of such an approach, on which have been based the programmes adopted within the framework of objective 5b, have been:

- co-operation between the structurally aimed funds ERDF, ESF and EAGGF Guidance section, effected through multi-funding action, with the aim of producing a multiplier effect at the moment when actions taken within the framework of a fund have required complementary action in the framework of another fund;
- partnership in the development process of all of the local, regional, national and community partners which has made it possible to identify the most urgent problems, and as a result, *intervention priorities* for individual rural circumstances;
- concentration of financial resources available for the priority requirements, essentially so as to achieve sustainable development of endogenous potential.

Rural development in both of the periods under consideration has centred around the financing of specific measures which, although formulated differently and expressed in different ways by the various member states, always come within the six priorities for intervention presented in Tab.1. This latter also shows the total quota of resources absorbed by each of these during the two different programming periods. Such indicative division of re-

³ Belgium, Denmark, Germany, Spain, France, Italy, Luxembourg, Holland, The United Kingdom; in the other three countries of the Community of 12 i.e. Greece, Ireland and Portugal, whose entire territories are eligible to take advantage of objective 1, the rural development intervention has been carried out in the ambit of this latter.

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sources makes it possible to see the principal changes to the intervention in the rural areas on passing from the first to the second programming period. We can see that, in the face of a reduction in the funding allocated to modernisation and diversification of the primary sector, there have been increases aimed at improving the quality of life in rural areas by stimulating tourist infrastructure, village renewal and local development.

Tab.1 Intervention priority categories and shares of resources absorbed in the two periods

<i>Priorities / Measures</i>	<i>1989-'93</i>	<i>1994-'99</i>
Development and diversification in agriculture	36%	25%
Economic diversification and development of SMEs	24%	25%
Development and improvement of human resources	18%	15%
Preservation and enhancement of the natural environment	12%	12%
Development of rural tourism	10%	12%
Village renewal and local development	0%	8%
Technical assistance	0%	3%

Source:[9] [10].

According to the Commission's preliminary ex post evaluation, based on a sample of 21 regions involved in the 5b objective in the 1989-1993 programming period, the integrated approach to rural development, even though being new for the local administrations, produced valid results. The principles of partnership, concentration and programming have been determining factors in the achieving of the objectives set. Even if the overall impact of the intervention should be judged with great caution, as the evaluation work is still not complete, by extrapolation we can say that in the period 1989-1993, within the framework of objective 5b there were created or maintained about 135.000 jobs, to which should be added those created or maintained by the Community Initiative Programme LEADER I. Furthermore, when we consider that there has been an overall decline in rural depopulation and a certain improvement in income levels, these overall results may be adjudged to be positive. As far as the 1994-1999 programming period is concerned, we can say on an analysis of the procedures and on checking the results, that the adoption of the SPD has facilitated the evaluation ex ante of the consistency between the allocation of resources to the priority categories and the economic results which should be achieved in the mid term, and also that the whole process of evaluation should be improved though this new programming instrument, thanks to the setting of execution and impact indicators upon which will be based the checks being carried during the course of the programme as well as those ex post.

4. The future of the Community rural development policy

The Cork conference of November 1996, made an important contribution regarding the orientation of future policy to be followed in pursuit of coherent rural development. Such policy should in no way exclude assistance for the agricultural sector, with whose decline

and restructuring is bound up the fate of the whole rural world. However, the policy must also take on board the need for the development of a core of business activities providing incomes outside of agriculture. To this end, the European Agricultural Commissioner Franz Fischler, expressed his hope for an integrated community policy approach which, as well as involving all socio-economic sectors of the rural world, takes account of the individual and specific needs of particular areas [13]. The ten points of the Cork declaration [11] at the end of the summit moved in this direction with a programme for rural development to be pursued over the next few years:

- *Rural preference*. Sustainable rural development to be achieved by improving the quality of the rural environment, must be a priority in the European Union's programme and become the fundamental principle upon which present and future rural policy will stand.
- *Integrated approach*. The rural development policy must be multi-disciplinary in conceptual terms and multi-sectorial in its application, while having a clear definition of the territorial aspects. It must include all the rural areas in the European Union, while respecting the concentration principle through the differentiation of co-financing for those areas which are more in need. It must be based on an integrated approach investing contemporaneously in all of the development priorities identified in areas with special difficulties.
- *Diversification*. Support for the diversification of socio-economic activity in rural areas must concentrate on the creation of a local environment which is favourable to the development of its endogenous potential.
- *Sustainability*. Rural development must be promoted within the framework of a balanced policy which sustains the quality and the essential attractiveness of the countryside in order to ensure development which is compatible with the needs of the environment.
- *Subsidiarity*. The diversity of the Community's rural areas means that the policy for their development must be as decentralised as possible so as to involve all interested levels (i.e. local, regional, national and community), which should collaborate and co-operate through a 'bottom-up' approach, to work out agreed forms of action together.
- *Simplification*. Rural development policy and, in particular, the agricultural aspect, is in need of substantial simplification in the rules so as to facilitate co-ordination with the CAP, in order to achieve greater coherency in intervention aimed at reaching common objectives.
- *Programming*. The creation of specific and consistent programmes for the local circumstances is fundamental to integrated intervention pursuant to rural development.
- *Financing*. The use of local financial resources must be backed up by public funding (both at national and community levels) in seeking the synergies which are essential for promotion of rural development projects.
- *Management*. Given that the participation of local and regional administration, as well as that of the rural community itself, is fundamental, there is a need to improve the management skills, where they are lacking, through the deployment of technical assistance and training.
- *Evaluation and monitoring*. Evaluation and monitoring must be brought up to good levels so as to ensure effective, efficient and open development intervention.

The principles behind future rural policy, more than being a real innovation as such, confirm and reinforce the directions which emerged from the structural funds reform of 1988 and the successive review in 1993, and upon which hinges today's rural development policy. In short, as is shown by Prof. Mannion of the University of Dublin, even though the

development programmes co-financed by the structural funds have had overall a positive impact on the rural areas of the member states, they have tended to produce sectorial intervention which is rather uncoordinated and little integrated to the specific nature of the areas for which they were destined [18]. The orientations emerging from the Cork conference are thus directed at the search for a integrated range of policies, programmes and initiatives for rural development able to create the synergies between the territorial and sectorial aspects of the intervention which the present rural development policy, despite having the potential, has been so far unable to do.

5. The wine routes as an instrument for the development of production in rural areas

In the context of a co-ordinated vision of development of the rural areas it has seemed to us useful to study one of the most interesting instruments employed in the valorisation of typical wines and their areas which has been spreading in recent times in the countries of southern Europe, but which is already well-established in the wine producing areas of northern Europe [16].

6. What is a wine route ?

According to the definition given by the Centre National des Resources du Tourisme en Espace Rural [4] the "wine route" is a sign-posted itinerary, through a limited area (region, province, denomination area) whose aim is the discovery of the wine(s) product(s) in the region and the activities which are associated with it. This discovering is carried out directly in the farms (enabling the traveller to meet the producer) and/or in the spaces specifically organised around the wine produced (wine tasting centres or wine museums).

The itinerary involves a number of stages consisting in :

- a visit to a wine farm with or without a wine tasting ;
- the discovery of the vineyard ;
- a visit to a museum or wine tasting centre ;
- the chance to purchase wines ;
- a "refreshment" stage enabling the visitor to try the culinary specialities of the region
- accommodation

The wine route is a kind of cultural itinerary which plays its part in the overall tourism strategy of a region. Like any other cultural itinerary it must correspond to a real or imaginary path, able to reveal, through a specific heritage, the elements which make up the identity of a geographical area. It is also the way in for the visitor's discovery of the other things which a region has to offer. For this reason it is important to create a network of itineraries which intersect with others and complement each other so that the visitor does not have a chance to get tired of a too full and single-themed itinerary.

A tourist itinerary is almost invariably accompanied by a brochure with a map showing the route travelled and its various stages. This is a particularly important factor as it is frequently what initially motivates the tourist.

The wine routes can either be worked out by public bodies which are involved in tourism, or by trade groupings such as producer unions, professional associations, or other associations.

7. The experience of various parts of Europe

The wine routes in Germany, such as the Rhine Palatinate are more than sixty years old and are among the oldest routes in Europe. The Rhine Palatinate runs through the wine region it is named after, along the edge of the forest, from North to South. The itinerary is 85 Kms in length and crosses a cultivated area of 27,000 hectares. There are good communications and a well-developed complex of tourist facilities and events. Each wine-producing locality in the region organises one or more wine-fests over the course of the year, with local foods and a special entertainment programme. Along the way there are important monuments, castles and villages. The risk which this route perhaps runs is that of being too well-known and established leading to a mass tourism which could distance it from the cultural roots of the itinerary [19].

In France wine tourism has long existed and has, from time to time, assumed different characteristics with industrial or technical tourism, 'green' tourism and cultural tourism. Today wine tourism is going through particular growth due to the desire on the part of the general public to learn more about wine, which has become a leisure product, and the wish to escape through the discovery of lifestyle symbolised by the world of wine.

In this field the experience is rather different given the differences in French wines, the viticultural organisation and objectives pursued, but we can certainly say that the growth in this type of tourism is due, from the eighties onwards, to the pressure of economic forces. A substantial number of wine-growers became aware of the advantages in direct selling and as a consequence became interested in tourism. At the same time large businesses and trading companies made large-scale investments in tourist facilities and infrastructure[17]. Some of the wine routes (see Alsace) are more than forty years old. Between the most important routes of France as that of Alsace, Burgundy and the Bordeaux region there are very important differences, due to the fame of the particular wine and the nature of the location i.e. whether near a large metropolis or areas of intense tourist traffic such as in mountain or seaside resorts and also depending on the way of working of the body running the wine route itself. In the best-equipped regions of Burgundy and Bordeaux the route signs have been renewed and a "reception charter" have been undersigned by the wine producers participating in the wine routes.

In Portugal, as in the other countries of southern Europe, the experience of wine routes is much more recent and is backed by laws giving them a framework and support. With its law 669/94 Portugal recognised the importance of wine routes and justified the creation of a tourism fund giving financial incentives to the working out of such itineraries, the adaptation and restoration of rooms and buildings etc. From 1994 a number of routes have taken off. The Port wine route, for example, has been created through the efforts of the Secretary of State for Tourism which invited the Port Wine Institute and South Douro Tourist Region to set up such a road [5].

In Spain the starting up of wine routes is still in its early days and seems to be stimulated more by institutional pressure than by associations of producers. The first was created in

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Cambados in Galicia, an area of O. D. Rias Baixas production, and it is from the experiences of this first area that the raw material for legislation on the matter has been drawn. Such legislation will provide for the co-ordination of the various different wine routes, establish criteria for their being set up in the first place, create an instrument for the development of the Spanish wine sector and establish control mechanisms and powers of inspection and correction [24].

The Italian experience is rather varied in nature. In the areas in the North East, where there is a German influence, the projects for wine routes were made some time ago as is also the case for Val d'Aosta. Currently a large number of wine routes are being set up in the central regions and Sicily [14]. There is rather warm debate surrounding what should be the characteristics of these routes fed by the strong interest which has become manifest in Italy over the past few years in wine tourism in general. Rough estimates show that the turnover in this sector is around 3.000 billion lire [2]. There have been numerous successful initiatives in recent years to open up the wineries and cellars to the public. The Movement for Wine Tourism, an association of more than 300 wine producers including many of Italy's finest, has with its 'open cellars' and 'starry chalices' events, made the first step towards the development of an advanced viticulture tourism.

As in Portugal and Spain, in Italy the need is felt for national legislation to cover the matter and the bills presented by the various political groupings were discussed in the previous legislature and have been presented once again in the current one. In the meantime legislation is being enacted a regional level. Particularly important is the law in force in Tuscany, both because of the effort which was put into its realisation and because of the importance of the wine production in that region. All the initiatives in Tuscany intended to favour the taking off of regulations for wine routes will act together in a co-ordinated fashion and will have the task of promoting and exploiting the Tuscan region in a global and systematic way. The aim of the legislation is to valorise and promote the high specialised wine-producing areas, as well as the production and businesses present in those areas, with a view to regulate and increase what its integrated tourist industry has to offer the visitor. The specificity of the districts delimited by the law 164/92 is indicated i.e. in addition to the wine areas which are of named origin, also inserted are those recognised as typical geographical areas of production. The law refers to a regulation on quality standards so that what is offered to the wine tourist is regulated, of high quality and uniform. Into these standards are included a set of financial rules which require those who get involved with the wine routes to improve what is offered to the tourists. The whole picture is framed in a co-ordinated and harmonious set of rules for all those who subscribe to the wine routes. One peculiarity of the law is that it provides that where there are information and cultural services which have value in terms of the infrastructure of the industry, these are promoted even with financial incentives: in particular the creation of and/or realisation of Museums of the Vine and Wine, the creation of Information Centres and the rationalisation of road signs within the wine district. Farmhouse tourist centres and vineyard enterprises which intend to come up to the minimum standards indicated in the regulations may take advantage of financial assistance giving support to help them raise quality. Such contributions amount, on average to 40% of the investment, with limits which are fixed by law. Particular attention is given to the Committee of promoters and the consequent Managing Committee, made up of not less than a third of the producers subscribed to the relevant producing roll. The management committee will see that, in addition to the viticulturists and their quality

standards, wine stores, restaurants and farm tourist centres can take part, and all those in the district who consider that they have an interest in being part of such an organisation. The role of the managing committee is extremely important as its task is to supervise the associates who have accepted the rules regarding the wine route, agreeing with its aims and accepting its minimum quality standards. Particular attention is reserved for the training of the staff, operators and the producers who subscribe to these rules [3].

Other regions are also following the path set by the Tuscan region as regards the law on wine routes and have made the legislation an integral part of their policy of rural development [12].

8. The role of the farms

The wine routes are by their very nature particularly suited to being pioneer instruments for rural development. They involve sectors which are in difficulty and requiring conversion such as the wine producing sector and agriculture linking them effectively with sectors in notable growth i.e. those of rural tourism and thematic tourism. The most important repercussions are renewed interest in the management of the countryside and the important potential for the creation of jobs and new professions.

In this context the farm itself is of essential importance. The success stories in Europe have been created around a nucleus of dynamic and innovative farms which are prepared to invest money and human capital into the initiative. From the numerous lessons learnt from the wine routes and from rural tourism in general it emerges ever more clearly that the incentives must support a productive reality which is capable of managing very large efforts. One French magazine [1] sought to identify the requirements for the management the welcome tourists to the wine producing farm on a wine route:

- an excellent knowledge of wine, of the region, the land there, the species of vine and of wine tasting skills
- a good attitude towards groups, be pleasant and easy going, and be able to speak in public
- the ability to speak English with a knowledge of the technical vocabulary of this sector
- to be able to advise people in their wine purchases
- to be able to invest for the mid term before making any gains

Along with these factors is the need for the farm to be able to provide suitable rooms for the reception of groups, a wine tasting service and guarantee a high standard of conservation and maintenance of the winery.

9. Conclusions

It is not possible to improvise a wine route. Where they have been successful in Europe they have been based on the balanced development of entrepreneurial effort in wine producing and tourism which has been proved capable of exploiting the natural vocation of the

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area for tourism on the one hand and the excellence of the wine produced over centuries of tradition and/or the special genius of particular producers on the other.

Much is being done operationally by the institutional bodies which are involved in agriculture and rural development as well as by those in the tourist institutions to transfer this experience which has been gained. Much remains to be discussed and much analysis needs to be done on the best ways of exploiting these opportunities and on the identification of the wine areas upon which the greatest efforts should be concentrated. In some respects the same problems are involved as those found in the analysis of the transferability of the experience of the agro-industrial districts.

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