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MASTER THESIS

**USING WINE TOURISM TO BENEFIT THE LOCAL COMMUNITY: A
PROPOSAL FOR SOALHEIRO AND PROJECT GERMINAR**

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ABSTRACT

In the last few decades there has been a growing call for both people and businesses to be more socially and environmentally responsible. Trending concepts such as sustainable and responsible tourism suggest that both tourists and providers are recognizing the need for tourism that is more aware of its impacts, but also recognizing the capabilities of tourism as a driver for social change. Soalheiro, a winery in northern Portugal, is committed to developing innovative projects that contribute to the sustainability of the surrounding region. Their latest endeavor is the expansion of their social initiative, Project Germinar, to incorporate a wine tourism component that will expand and strengthen its impacts.

Project Germinar is an integration program, where mentally challenged members of the local community are incorporated into work in the vineyards. This master's thesis focuses on the development of a tasting room for Project Germinar, which will expand the initiative's integration potential while also using tourism to better communicate its social values. This thesis uses contextual analysis, benchmarking, and research in the academic literature to create a proposal for the Project Germinar tasting room. The work is founded in concepts that include sustainable and responsible tourism, social entrepreneurship, inclusivity and accessibility, CSR, and communicating brand values.

The work results in three interconnected proposals for the tasting room strategy: an action plan, a tourism strategy, and a business model. These proposals work together to communicate the approach that will turn an abandoned house on the vineyard property into a fully operational tasting room and community space, integrating mentally handicapped people into its staff. The work then discusses the proposal's reception by Soalheiro, concluding with what adjustments will be made to turn it into a reality.

KEY WORDS: Social Projects, Sustainable Tourism, Wine Tourism Development, Employing Mentally Handicapped Individuals, Integration, Inclusive Tourism

LIST OF ABBREVIATIONS:

APPACDM: Associação Portuguesa de Pais e Amigos do Cidadão Deficiente Mental (Portuguese Association of Parents and Friends of Mentally Disabled Citizens)

BM: Business Model

CSR: Corporate Social Responsibility

DGADR: Direcção-Geral de Agricultura e Desenvolvimento Rural

DO: Denominación de Origen (Denomination of Origin) (Spain)

DOC: Denominação de Origem Controlada (Controlled Denomination of Origin) (Portugal)

IGP: Indicação Geográfica Protegida (Protected Geographical Indication)

SDGs: 17 Sustainable Development Goals

SE: Social Entrepreneurship

UNEP: United Nations Environment Program

UNWTO: United Nations World Tourism Organization

1. INTRODUCTION

In the face of globalization, growing levels of inequality, as well as the ever-present climate crisis, there has never been a more crucial time for businesses to adopt more sustainable practices and be cognizant of impacts on their surroundings. With the rise of quick and easy access to information, consumers are researching more and more the ethics of the companies they are supporting and making more informed decisions about which businesses they patronize. This has resulted in a growing call for businesses to adopt more conscious practices and, perhaps even more so, to develop initiatives that work to combat growing problems in our society. In 2015, the United Nations presented its 17 Sustainable Development Goals, providing a set of objectives to guide future development that can create a more livable planet for everyone. These goals “recognize that ending poverty and other deprivations must go hand-in-hand with strategies that improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve our oceans and forests” (United Nations, n.d.). Many companies are choosing to align business strategies with these SDGs, or other sustainability-focused guidelines, signifying a growing trend towards more responsible business practices and projects that can benefit society as a whole.

This master’s thesis will focus on one such initiative, entitled *Project Germinar*, a social project developed by Soalheiro, an internationally recognized Portuguese winery. Project Germinar is an integration project centered on providing work opportunities to people with cognitive disabilities. The objective of this thesis is the development of a proposal for the next phase of Project Germinar: wine tourism. This work begins with an introduction to the company and the project, followed by the methodological approach utilized for the creation of the proposal. It subsequently explains the background information and context gathered, followed by the strategies developed. The work concludes with a discussion of the reception of the proposal and its envisioned future.

1.1 Soalheiro

Quinta de Soalheiro, commonly known as Soalheiro, is a winery at the very most northern point of Portugal, just across the Minho river from Spain. It is a part of the Vinho Verde DOC, more specifically the Monção and Melgaço subregion, the birthplace of the Alvarinho grape varietal in Portugal. The spirit of Soalheiro was born in 1974, when António Esteves Ferreira and his son, João António Cerdeira, planted the first continuous vineyard of Alvarinho in the area. Previously, vines were planted along the borders of plots growing cereals and grains in the center, but devoting an entire parcel of land to grape vines was practically unheard of. This pioneering frame of mind continued, and in 1982 the family formalized their wine making venture and founded Soalheiro, the first Alvarinho brand in Melgaço. Leading the company presently are siblings António Luís Cerdeira (known as Luís) and Maria João Cerdeira, the third generation of the family, along with their mother Maria Palmira Cerdeira. Today, Soalheiro remains firmly devoted to the Alvarinho varietal, as well as the region of Monção and Melgaço, and commits to their advancement through the innovative spirit that has been part of the

project since day one. Producing a wide range of wines, Soalheiro has become an international benchmark for Alvarinho, with presence in over 40 countries and a collection of recognitions for producing wines of quality.

Since day one, Soalheiro has been committed to the economic, environmental, social, and cultural sustainability of Monção and Melgaço. They are constantly developing and implementing initiatives that support sustainability in all its forms. One such initiative is their Club of Producers. Founded by Soalheiro, it is an organization of the vineyard owners from which the winery buys its grapes, where members receive guidance and assistance in sustainable and environmentally conscious grape growing throughout the year. The majority of these grape growers are locals with another full-time profession, attending to small family plots in the evenings or on weekends. Through this initiative Soalheiro contributes to the economic and environmental sustainability of the region, but also to its cultural sustainability, as support for local farmers ensures the continuation of the region's grape growing culture. Recently, Soalheiro introduced a line of organically grown herbal teas, honoring the region's long-standing herb growing traditions. In 2019, they opened the Soalheiro Innovation Center, a department dedicated to innovative projects that will help the company, the region, and its inhabitants progress in a sustainable fashion. Projects from the Innovation Center cover a variety of topics including an incubator for local winemakers, viticulture and winemaking technologies, environmental strategies, wine tourism activities, and social initiatives.

1.2 Project Germinar and the Thesis Proposal

Project Germinar is a social initiative at Soalheiro. It began when António Matos, a social worker, vineyard owner, and member of the Club of Producers, approached Soalheiro with the idea of incorporating several local people with mental disabilities into his vineyard work. As a professional in this field, António emphasized the positive impact that a work environment can have on the social development and quality of life of intellectually disadvantaged individuals. This led to the creation of Project Germinar, a special venture based on the partnership between António and Soalheiro. Collaborating with the Valença delegation of the APPACDM (Portuguese Association of Parents and Friends of Mentally Disabled Citizens), this project employs several members of the APPACDM for vineyard work throughout the year. This integration initiative encourages personal, emotional, and professional development while creating dignity and promoting an awareness of equal opportunities. Soalheiro gives value to their hard work by producing a special wine, *Germinar*, from the grapes purchased from António's vineyard plots. To encourage its economic sustainability, a portion of the sales of this wine are reinvested into the project. This initiative is not meant as charity, but rather an important social and cultural project that values the hard work of this group of people, while also upholding the region's important grape growing traditions.

This social initiative has shown great success, noticeably improving the lives of the people involved. Given the positive impact of Project Germinar, it is now time to expand and begin the next

phase, which will be the development of a wine tourism component. Soalheiro wants to develop a special identity for the project, one that represents the terroir that grows these grapes and the hard work that happens there. One of the best ways to communicate the program and its values is by bringing people to the site to experience it first-hand. Recently, the project acquired a historical building next to the Germinar vineyards, known as *Casa Vigia*. The plan is to turn this small house into a tasting room which will be an extension of the integration project, employing local mentally challenged individuals for its daily operations. The tasting room will communicate the values of the Germinar terroir, wines, and special integration project while further contributing to the professional development of these individuals.

As noted by Costa *et al.* (2020), tourism can serve as “an instrument of development and advancement of both the economy and society” (p. 775). Tourism has had proven positive impacts on host communities and tourists alike, providing new opportunities, promoting inter-culturalism, and having the potential “for building a more inclusive society” (Costa *et al.* 2020, p. 775). In the face of calls for more sustainable and conscious initiatives, now is the time to use tourism in ways that can have the greatest positive impact. Honoring Soalheiro’s already proven commitment to sustainability and innovation, this thesis work centers on the expansion of the winery’s existing social project to include tourism in a meaningful way. Specifically, this master’s thesis details and justifies the process of constructing proposals for the venture’s action plan, wine tourism strategy, and business model.

1.3 Internship Activities

The internship that formed the practical basis for this master’s thesis was performed from February through June of 2021. The objective was to gain a comprehensive understanding of communication and wine tourism development strategies at a medium-sized winery with international recognition. The main focus during the internship was the proposal for the strategy behind the Project Germinar tasting room. Other duties involved communication and content development for Soalheiro’s new website, gaining knowledge about digital communication, storytelling, and branding strategies. Given the State of Emergency in Portugal due to the COVID-19 pandemic, there was not a lot of wine tourism activity, but support for special events, including a visit from the President of the Republic of Portugal, Marcelo Rebelo de Sousa, also formed part of the internship duties.

2. METHODOLOGICAL APPROACH

To begin strategizing the next phase of Project Germinar, the first step was a situational analysis. When the author began her internship, the original vineyard integration and winemaking portion of Project Germinar was already established, but the wine tourism concept had yet to be developed. Soalheiro had recently acquired Casa Vigia but no plans for the house had been made. The first two general questions to be addressed were therefore *how can Soalheiro use this property to benefit Project Germinar?* and *what steps must be taken to make this plan a reality?*

Through several unstructured interviews and brainstorming sessions with Luís, manager and oenologist at Soalheiro, these questions were answered. It was decided that Casa Vigia would become a tasting room and tourism space for Project Germinar. This established the basis for this master's thesis work. With this goal set, the wine tourism team identified three separate yet interconnected plans that would be required to build the project's foundation: a project action plan, a tourism strategy, and a business model. The author was then charged with developing proposals for these three plans. Though the ultimate goal is implementation of these strategies, this phase of the project could not be reached during the time constraints of the academic work.

The creation of the proposals was based in qualitative research. The author collected data to contextualize the project through her daily work and interactions with the team at Soalheiro. This included information about the conditions under which the project would develop, starting with more logistical conditions such as the physical state of Casa Vigia and what resources would be needed for the project. This also included less tangible topics, such as the history of the area, the region's existing tourism offer, the values of Soalheiro, and the goals of the tasting room project. The author then supplemented this data with further qualitative research. Similar projects were investigated to identify strategies that could benefit Project Germinar. Additionally, the author engaged extensively with academic literature that could inform the work. Specifically, the business model proposal was developed following Daniele and Quezada's model in "Business Models of Social Entrepreneurship in Tourism" (2017). This research was supplemented by concepts learned during the author's master's studies, particularly those about sustainability and tourism for regional development. The collected data was analyzed and interpreted by the author, then used to inform the creation of the proposals.

3. BACKGROUND RESEARCH

To develop the strategy behind the Project Germinar tasting room, it was necessary to first collect information that could aid and inform the creation of the three proposals. Specifically, this meant reviewing related academic literature and examining similar projects. This placed the work in a larger, global context before focusing on its more particular details.

3.1 Theoretical Background

While there are many concepts and theories that could contribute to this work, the author focused on several key areas most crucial to the project's strategy. These included sustainable and responsible tourism, social entrepreneurship, inclusivity in tourism employment, CSR, and the communication of a brand's values.

3.1.1 Sustainable Tourism, Responsible Tourism, and Social Entrepreneurship in Tourism

As the negative effects of mass tourism on host communities and the environment become more and more apparent, there has been a growing call for better tourism practices. Global organizations, such as the UNWTO and the European Commission, as well as experts in the field, such as Goodwin

(2016) and Leslie (2012), all recognize the need for more conscious tourism behaviors from both hosts and visitors (UNEP & UNWTO, 2005; TSG, 2012). This has resulted in a variety of tourism strategies intended to benefit destinations, such as ecotourism, solidarity tourism, and voluntourism, among others (Manente *et al.*, 2014). Two of the most popular and important concepts, particularly in the last few decades, are sustainable tourism and responsible tourism. Often used interchangeably, the two terms are in fact different, though the literature often struggles to distinguish the concrete differences between the two (Mihalic, 2014; Manente *et al.* 2014). Arguably the most cited definition of sustainable tourism comes from the UNWTO (2005) which, put simply, explains that sustainable tourism should be conscious of its impacts on the environment, respect host communities, and ensure long-term economic viability. This should all happen with active participation from stakeholders, particularly local governments and the host population, with special attention paid to the impacts of tourism. As explained by Dávid (2011), sustainable tourism “has to [satisfy] the necessities of present day tourists and hosting areas,” recognizing that economic sustainability in tourism involves maintaining a tourist flow (p. 212). Destinations must protect their own resources (both environmental and social), while remaining appealing to their visitors in order to maintain the economic viability of tourism for the area. The UNWTO clarifies that “sustainable tourism is not a discrete or special form of tourism. Rather, all forms of tourism should strive to be more sustainable” (p. 2).

As Goodwin (2020), among others, clarifies, responsible tourism and sustainable tourism are not the same (Mihalic, 2014; Manente *et al.*, 2014). Manente *et al.* boil the differences down to being supply-side (sustainable tourism) and demand-side (responsible tourism), arguing that responsible tourism has to do with how visitors act in an environment, while sustainable tourism has to do with how the destination plans tourism. Given the work of other authors, Manente *et al.*'s definition may be too simple. Mihalic (2014), supported by Leslie (2012) and Goodwin (2016), summarizes in their work that sustainable tourism is about the concept, the ambition to be sustainable, while responsible tourism is about the actions performed to improve the impacts of tourism. In this sense the divide is not about supply-side and demand-side, as local bodies in the destination must perform the actions that improve the tourism offer and are therefore participating in responsible tourism. The *Cape Town Declaration* (2002), presented during the *Cape Town Conference on Responsible Tourism*, offers a definition that focuses on both sides, emphasizing the generation of economic benefits, inclusion of the host community in tourism decisions, providing enjoyable experiences for tourists through meaningful connections with local people, and minimizing impacts on the environment and cultural heritage. With this definition, responsible tourism can take many forms, and texts such as the *Responsible Travel Handbook* (2006) emphasize a growing call from both tourists and destinations alike for travel that is more conscious of its impacts and beneficial to its hosts.

Given the pleas for more responsible tourism, there has been a rise in creative ways to use tourism to benefit people. Specifically, there are a growing number of social entrepreneurship (SE) projects developing in the tourism sector. SE, as recognized by Sheldon *et al.* (2017), lacks a clear-cut

definition but the overall idea is consistent among the literature. In simple terms, SE is the idea of using business tactics to solve social problems (Sheldon *et al.*, 2017; Kalargyrou *et al.*, 2018). Rather than forming charities or volunteering, social entrepreneurs start companies and find creative business solutions to social issues, often with the goal of making “social profit,” or social progress, rather than financial profit. Sheldon *et al.* define SE in tourism specifically as “a process that uses tourism to create innovative solutions to immediate social, environmental and economic problems in destinations by mobilizing the ideas, capacities, resources and social agreements, from within or outside the destination, required for its sustainable social transformation” (p. 9). Kline *et al.* (2017) explain that social entrepreneurship projects “[fulfill] a role in the economy where market and government fail” (p. 143). In other words, they address issues that are otherwise neglected in society, aiding powerless members of the population and engaging the whole community in solutions.

Project Germinar is at its core a social project and can benefit from the strategies that have proven successful for other tourism social entrepreneurship projects. Various authors express the importance of the development of networks, which SE initiatives must create and use for acquiring resources (Daniele & Quezada, 2017; Kalargyrou *et al.*, 2018; Sforzi & Colombo, 2020). As enterprises focused less on financial profit, SE projects may not have a lot of capital to get things done and should benefit from any partnerships they can create. Mosedale and Voll (2017) also recognize networks in the form of community involvement, advocating for “bottom-up” social entrepreneurship where local communities actively contribute “local experience, knowledge and...local values” to the development of projects that will impact them (p. 109). Additionally, the literature emphasizes that SE enterprises should look to innovation as a way to solve complex social issues (Sheldon & Daniele, 2017; Kalargyrou *et al.*, 2018; Mosedale & Voll, 2017).

Another key aspect crucial to the success of social entrepreneurial enterprises is the development of a business model (BM). Daniele and Quezada (2017) recognize the importance of business models in understanding how an organization creates and delivers value for its stakeholders, explaining that BMs help “users to visualize the key component blocks and stakeholder groups within the business and their relationships” (p. 81). The authors go on to acknowledge that BMs for social enterprises, such as Project Germinar, “use dramatically different models for value creation when compared to traditional business models” (p.81). SE projects focus on the creation of *social value*, rather than economic value (Kalargyrou *et al.*, 2018; Kline *et al.*, 2017). This social value can be created in a variety of ways, at various points along the value chain, and can benefit a number of stakeholder groups. This differs from traditional, economic value-based business models, where typically the value is concentrated at the end of the value chain and aimed at a final consumer. After taking into consideration the literature surrounding business models for social enterprises, Daniele and Quezada (2017) present the building blocks for a business model that combines the models created by Osterwalder and Pigneur (2010) and Sommerrock (2010), applying them specifically in a tourism social enterprise context. These building blocks are value proposition, key activities, key partners, key resources, customer segments,

customer relationships, distribution channels, cost structure, revenue streams, legal structure, and growth. The business model of a tourism social enterprise should focus on how the business creates value, what networks can be created to add value, and how the project can generate revenue, leading to its self-sustainability (Lehman-Ortega *et al.*, 2010).

3.1.2 Inclusivity in Tourism and Employing People with Disabilities

Literature about employing people with intellectual disabilities in tourism is scarce. The works that do exist center on employment of people with all types of disabilities, with no works focusing specifically on staff with mental disabilities. The consensus in the literature is that employers may at first be hesitant to hire workers with disabilities, sometimes even holding prejudices against them, but the benefits outweigh the potential problems (Smith Jr. C.H.A., 1992; Bengisua & Baltab, 2011; Kalargyrou *et al.*, 2018). In fact, Smith (1992) and Bengisua and Baltab (2011) both recognize that handicapped employees are often more productive and miss less work than employees without disabilities. This can stem from their appreciation for the opportunity given to them by employment, as such opportunities for them are harder to come by. Bengisua and Baltab (2011) find that the increased productivity of staff with disabilities sets “a positive example for coworkers, providing reliable, cooperative, loyal and highly effective employees” (p. 44). Kalargyrou (2018) notes the benefits for employees and employers alike, finding that employees with disabilities appreciate the financial benefits of their positions as well as the “opportunity to show what they are capable of” (p. 17). Employers, they found, are happy with the opportunities they are able to create as well as the impact their business has on changing general perceptions about people with disabilities. Both Bengisua and Baltab (2011) and Kalargyrou *et al.* (2018) highlight that hiring people with disabilities can actually improve consumer attitudes towards a business.

In regard to the logistics behind hiring people with disabilities, again the literature focuses mainly on adapting to physical disabilities rather than mental, but the theories are still valuable. Most strategies recommend treating those with disabilities the same as those without, suggesting that businesses have had the most success not overly changing their training procedures or physical space to adapt to those with disabilities (Smith Jr. C.H.A., 1992; Bengisua & Baltab, 2011). Bengisua and Baltab (2011) note that people with disabilities want to be treated like everybody else and do not want special privileges. Of course, this does not mean that people with disabilities can perform all the same job functions. There is always the need to place them in positions where they are capable of performing their duties and to adapt the physical space to account for any safety issues. It is important to identify what tasks people with disabilities will excel at and to play to the strengths of each individual (Bengisua & Baltab, 2011). Additionally, Kalargyrou *et al.* (2018) note the success that job training has for people with disabilities, with companies focusing not only on training programs for their own positions, but also to prepare disabled people for other opportunities in the workforce.

The literature about inclusive and accessible tourism development also informed this project's strategies for integration. With the growth of mass tourism and its ability to impact communities and emphasize disparities, many experts are calling for more inclusive tourism offers (Costa *et al.* 2020; Couret, 2020; Cerdan Chiscano & Darcy, 2020; Scheyvens & Biddulph, 2017). Scheyvens and Biddulph (2017) define inclusive tourism as “transformative tourism in which marginalized groups are engaged in ethical production or consumption of tourism and the sharing of its benefits” (p. 593). This definition encompasses all tourism that works to include those who are at the risk of societal exclusion, not just those with disabilities. Its focus on engagement of marginalized groups not only in the consumption of tourism, but also in its production, is important for this project. The literature in relation to inclusive tourism for people with disabilities is focused on disabled people as consumers, but some concepts can still be relevant for Project Germinar. Cerdan Chiscano and Darcy (2020) emphasize the value created during interactions between people with disabilities and people without during a tourism visit. They find that providing tools that can be shared by those both with and without disabilities to aid in communication is key for positive experiences and value creation for both groups. Kalargyrou *et al.* (2018) support this claim, highlighting the effectiveness of tools to facilitate communication (such as pictures or even assistive technology) and encouraging interactions between disabled restaurant staff and non-disabled patrons as a means of value creation. In summary, literature emphasizes the importance of providing comfortable conditions for people with disabilities, both as staff and consumers. This should be done without emphasizing disabilities, and in a way that promotes feelings of equality and integration.

3.1.3 CSR and Communicating Brand Values

In recent years there has been a shift towards, what Hatch and Mirvis (2010) call, “‘ethical’ consumerism” (p. 48). This is recognized across the literature as a shift towards “consumers –as well as employees, shareholders, the financial community, media, and nongovernmental organizations (NGOs)- [yearning] for something meaningful in their consumption activities and [looking] to companies to offer meaning by exemplifying credible, value-laden, and authentic traits” (Vallaster *et al.*, 2012, p. 34). In other words, consumers, as well as employees, stakeholders, and shareholders, are looking for businesses to uphold higher values in their operations. This desire for more morality and awareness from companies has given rise to the concept of CSR, or corporate social responsibility. Several authors recognize the existence of slightly differing definitions of CSR, but the basic meaning is fairly universal. CSR is a business’ recognition of its responsibility to society and the environment, but also to its shareholders and employees (Manente *et al.*, 2014; Wilburn & Wilburn, 2014). In this sense, there is a “triple bottom line,” where “businesses have to be aware and responsible for the economic, social and environmental impacts they produce with their activities” (Manente *et al.*, 2014, p. 16). In other words, businesses should be focused on being profitable while also minimizing negative impacts on their surroundings. This can incorporate a variety of strategies, including improving working

conditions and evaluating where to lower environmental impacts in the supply chain. Taking it one step further, many businesses are acknowledging CSR and are working to not only lessen their negative impacts, but also to develop initiatives outside of their normal operations that will ultimately benefit the environment and society.

With the rise of focus on CSR, many authors are recognizing its inevitable impacts on branding. A brand is an intangible concept that refers to the way people (consumers, stakeholders, shareholders) identify and perceive a company or a specific product. Brands are a valuable tool for differentiating one company or product from another (Kenton, 2020). In discussion of CSR, what is important to recognize is how brands incorporate a business' values. Vallaster *et al.* (2012) and Blumenthal and Bergstrom (2003), among others, recognize that a company's values are directly linked to how their corporate brand or product brands are viewed. This directly relates to CSR, where a business' recognition of its responsibility to its surroundings can positively, or even negatively, impact how it is perceived. Manente *et al.* (2014) recognize that "CSR can contribute to increase consumer confidence in a context where customers and society at large have decreased their trust in business standards and ethical behaviour" (p. 15). In other words, CSR can increase consumers' positive perceptions of a company or brand and distinguish it from other, less responsible producers. Hatch and Mirvis (2010) and Blumenthal and Bergstrom (2003) acknowledge that corporate branding is not developed solely by communication and marketing teams. If a business wants to communicate its values, it must recognize that "all activities undertaken by the organisation affect perceptions of its brand," and therefore be sure that all its activities support the values it wants to convey (Blumenthal & Bergstrom, 2003, p. 328).

Understanding how to communicate a brand's values or principles was important for the development of this work. Soalheiro has strong company values about sustainability, innovation, and inclusivity that must be communicated with the Project Germinar tasting room in an authentic way. This can be a delicate job to navigate, as consumers can be skeptical about companies that paint themselves as responsible. As CSR gains popularity, more and more companies are presenting themselves as sustainable in communication without actually backing up their claims (Vallaster *et al.*, 2014). Wilburn and Wilburn (2014) suggest seeking out certifications such as B Corp to prove a company's commitment to sustainability. Though that could be in the future for Soalheiro, for the work at hand the author had to consider other ways to communicate values in an meaningful way. Hatch and Mirvis (2010) focus on a "participatory process" when it comes to CSR and communication. This can be interpreted on two levels. The first is recognizing that companies must involve the opinions of stakeholders when developing their CSR and branding strategies, as these stakeholders are directly affected and the ones interpreting the brand and its values. In the example of Project Germinar, this involves taking into account the needs of the local community and considering how the tasting room will serve their needs. The second level of interpretation is more communication based and argues that a brand's perceived values are both the company's own statements, as well as the way that others (consumers, stakeholders) interpret these values. Hatch and Mirvis (2010) go on to explain that a

brand's values "actually [live] in the enactments that occur locally, beyond the control (but not the influence) of the corporation" (p. 47; Hatch, 2012). This suggests that the values of Soalheiro and Project Germinar can be communicated by the participatory experiences had in the tasting room. The winery's values of innovation and inclusivity can be communicated through the inclusive and innovative nature of the tasting room itself. This is in line with a good part of the literature consulted here, where the best way to communicate a brand's values is to *show*, rather than *tell*.

3.2 Benchmarks

With the rise of attention on sustainable development and CSR, it comes as no surprise that many businesses are moving to include social projects as part of their operations. In recent years there have been more and more social projects emerging from the wine sector, many with a particular focus on integration. One example is The Township Winery in Cape Town, South Africa, which works to include black people as vineyard growers and winemakers. Due to the impact of Apartheid-era laws, this population has been left out of the region's important wine culture, which Township recognizes as unsustainable (Hatchuel, 2019). Sforzi and Colombo (2020) note the rising trend of social agriculture initiatives in Italy encouraged by the Italian government. Though their research focuses on work integration programs at Italian microbreweries, there are also many examples of Italian wineries with such programs, particularly focused on vulnerable populations such as the mentally handicapped or prisoners. Frescobaldi in Tuscany, for example, partners with the penitentiary on the island of Gorgona, integrating prisoners into vineyard and winemaking work for their professional development (Frescobaldi, 2020).

Social integration projects in the wine industry are, therefore, not unheard of, and are in fact growing in popularity. What appears less common is the incorporation of tourism in these projects. Perhaps this is due to the delicate nature of integration initiatives, or the desire to avoid any feelings of showing off or putting the integrated population on display. Incorporating tourism into an integration initiative can be a difficult task to navigate. The following are cases that have successfully linked integration with tourism and provide important examples for the development of the Project Germinar tasting room. To inform the project's strategy, the author examined these benchmarks with a focus on integration initiatives, products offered, representation of local culture, perceived market, communication style, funding, and any charitable elements.

3.2.1 Wivable

Located in the Jerez wine region in southern Spain, Wivable is a wine tourism operator focused on memorable wine tasting and wine tourism experiences. The owner and founder, José Luis Baños, is a local from the region with a background in both winemaking and tourism (Benítez Pedraza, 2019). Partnering with local wineries, Wivable offers a variety of experiences, from tastings to boat cruises to private winery visits.

Integration. As part of the service and tasting staff for the wine tourism experiences, Winable employs local residents with Down syndrome. These members of the staff are trained in sommelier and service techniques through the Down Jerez Aspanido Foundation, a local organization in Jerez that aids people with Down syndrome in developing skills and independence. José Luis Baños volunteered for the organization and now heads their communication and events department (Sánchez Tena, 2019). On the website the only staff listed are the owner (José Luis Baños) and two tasting staff with Down syndrome, Miriam Romero and António García (Wirable, n.d.). This emphasizes their position as core members of the team while also normalizing their inclusion.

Products. Winable focuses on memorable wine tasting and tourism experiences. This includes tastings on a boat, tastings paired with live music, food and wine pairings, and custom events. Wine tourism experiences are all private and include unique offers such as a nap in the winery, a blind-folded visit, and a visit paired with sports activities. The company also offers consulting for local wineries that want to improve their communication and wine tourism.

Representation of Local Culture. Winable focuses on sherry, a fortified wine produced only in Jerez. Products include visits to sherry wineries as well as wine pairings with traditional foods. One of their most popular products is a tasting with live Flamenco, a style of music that originated in the region.

Perceived Market and Communication Style. The website is offered in Spanish, English, French, Italian, and German, indicating that they are at least trying to reach these markets. Social media (Instagram and Facebook), however, is offered only in Spanish, suggesting that their largest market is Spaniards. Visits and experiences range from 120 EUR/person to 240 EUR/person, with private group events starting around 700 EUR/person (Wirable, n.d.). Given the pricing and nature of events, the market is likely middle to upper class with an interest in wine, gastronomy, and local culture. In terms of communication, the integration project is present in social media and on the website, but it is not at the forefront. The emphasis tends to be on local culture and exclusive experiences, with communication about the social aspect handled in a delicate and respectable way.

Funding and Charity. There is no indication that the company receives any special funding for being a social initiative, so it is assumed that operations are funded by revenue from sales of the products. There is no mention of the company donating to any charity on their website. The online shop previously featured a special wine made by a local winery with the proceeds from sales being donated to the Down Jerez Aspanido Foundation. This is no longer mentioned anywhere on the site.

3.2.2 L'Olivera Cooperativa

L'Olivera is a cooperative in rural Cataluña (Vallbona de les Monges) that started in 1974 as both an agricultural and social project. Focusing on the cultivation and production of olive oil and wine, the founders wanted to use this rural farm area to benefit both the local economy and people with intellectual disabilities. Since its creation almost 50 years ago, the organization has expanded to include

a number of social, agricultural, and economic initiatives. In 2010 they took responsibility of a vineyard and farm in Barcelona (owned by the Barcelona City Council), called Can Calopa de Dalt, which they have turned into a second social agriculture project for people with disabilities. This site features a winery, farmhouse, and a newly opened wine bar (L'Olivera, 2020).

Integration. The integration initiative at L'Olivera is expansive and involves a variety of different programs. At the original cooperative in Vallbona de les Monges, people with intellectual disabilities are incorporated into all production and agricultural work, with two people working in a local restaurant as well. There is an occupational therapy program for people with disabilities who cannot be fully integrated onto the staff but can benefit from activities such as gardening or labeling bottles. The cooperative has a training program to help residents with disabilities gain job skills with the goal of ultimately being employed. Additionally, there is a residence where people with mental disabilities can live and benefit from social integration (L'Olivera, 2020).

At the Can Calopa de Dalt farm site, there is another set of integration projects. Here, residents with intellectual disabilities also benefit from work integration, including work in the winery, vineyard, as well as wine tourism activities. There are several residences for people with disabilities with the objective of promoting social development and personal autonomy. In January of 2021 a new initiative was started here called *Empresa de Inserción L'Olivera-Can Calopa*, which operates the wine bar. The project seeks to train and employ vulnerable people, providing them with social services, with the final objective of their incorporation into the workforce (L'Olivera 2020).

Products. L'Olivera sells a range of wines and olive oils available online, at local shops and restaurants, or through direct sales at their sites in Vallbona or Barcelona (Green4C, 2020). Their wine *Vinyes de Barcelona*, produced at the Can Calopa winery, is the only wine produced within Barcelona's city limits. They offer tourist visits at both locations that include winery and olive oil mill visits, special pairing and tasting packages, visits to the vineyards, harvest experiences, and planned lunches. Guests can enjoy a glass of wine and a snack at the Can Calopa wine bar (L'Olivera, 2020).

Representation of Local Culture. The focus of production is on olive oil and wine, two products that have a long history of cultural and agricultural importance in Catalunya. Wines are, for the most part, produced under DO Costers del Segre and focus on native varieties to Catalunya such as Parellada and Xarel·lo. Oils are produced from important local olive varieties such as Arbequina and Becaruda. Tourist visits explain the history of the area and meals feature local products. Additionally, visits to the oil mill or the harvest experience allow guests to take part in activities that are an important piece of local culture (L'Olivera, 2020).

Perceived Market and Communication Style. The website is available in Spanish, English, and Catalan. Social media (Instagram and Facebook) is all in Catalan. According to information collected by the EU-funded research project Green for Care (2020), 85% of products are distributed within Catalunya. This combination of factors suggests that the main market is locals from the region. In terms of communication style, the website explains the social projects but not in a way that makes it the central

focus. The social media pages focus mostly on special events and the agricultural work, rather than the integration project. As explained by Green4C (2020), the strategy is that “the customer [enjoys] the wine first and only after [knows] about the social values that underpin” (p. 2).

Funding and Charity. L’Olivera’s funding comes from a variety of sources, Green4C (2020) explains. 55% of income is from their own economic activities, while the rest is sourced from the regional government, EU funding, and small private investors. They also utilize the crowd funding website Goteo to collect financial support for special projects. L’Olivera has its own charity, the Olivera Foundation, which takes .7% of the profit from L’Olivera and uses it for social projects that involve L’Olivera but do not necessarily take place in Spain (L’Olivera, 2020).

3.2.3 Bitty & Beau’s Coffee

Bitty & Beau’s is a coffee shop chain in the United States founded by Amy and Ben Wright after their two youngest children, Bitty and Beau, were born with Down syndrome. Frustrated by the lack of professional opportunities for adults with disabilities, they decided to start their own business with the aim of employing as many intellectually disabled people as possible. The original location is in Wilmington, NC (USA), but there are now four locations operating in the US, with many more planned in the coming year (Bitty & Beau’s, 2021). Though not a winery, the integration project at Bitty and Beau’s is a true benchmark for integrating people with mental handicaps into the workplace.

Integration. The original Bitty & Beau’s employed 19 people with intellectual disabilities. Staff members with handicaps occupy all roles at Bitty & Beau’s, from baristas, to working the cash register, and even up to management positions. With the opening of other shops, the company now employs more than 120 people with disabilities. The integration is seamless, as the owners and supervisors really try to focus on every staff member’s strengths and abilities (Bitty & Beau’s, 2021). By focusing on the belief that “everyone is employable, everyone is capable,” Bitty & Beau’s offers its staff professional opportunities they would likely not have found elsewhere, while also encouraging a better sense of inclusion in surrounding communities (Annapolis Discovered, 2021).

Products. Following the American coffee shop culture, Bitty & Beau’s sells made to order beverages (such as coffee and smoothies), as well as baked goods and breakfast items, which can be enjoyed in the shop or for takeaway. They also sell their own brand of roasted coffee beans and a large selection of branded merchandise (Bitty & Beau’s, 2021). Though it does not offer tourism experiences, per se, the entire visit to Bitty & Beau’s is an experience. Guests are encouraged to interact with staff members and appreciate the inclusive atmosphere (Annapolis Discovered, 2021).

Representation of Local Culture. Coffee shops are a common type of restaurant in the United States, with Bitty & Beau’s offering a warmer, more inclusive version of this popular piece of American culture. It does not appear that they offer any local products that are directly connected to the different communities in which they operate.

Perceived Market and Communication Style. With the website and all communications being in English, as well as the nature of coffee shops serving local repeat customers, it can be assumed that the primary market is locals. Given the strong communication of the company’s social integration mission, Bitty & Beau’s targets people who want to patronize businesses that support important causes. Additionally, with several locations specifically placed in office buildings, Bitty & Beau’s targets businessmen and women (Bitty & Beau’s, 2021). Communication focuses first on the integration project, and second on the coffee, with social media (Instagram and Facebook) featuring many images of happy staff, as well as the Wright’s children, Bitty and Beau.

Funding and Charity. Amy Wright started a non-profit called Able to Work USA, which helps people with disabilities find work (Riddle Williams, n.d.). Toner for CNN (2017) explains that the profits from Bitty & Beau’s benefit Able to Work USA, while the Bitty & Beau’s website explains the opposite, that the non-profit helps support Bitty & Beau’s (Bitty & Beau’s, n.d.). This suggests that some donations to the non-profit go towards the coffee shops, with any profit from the coffee shops being donated back into the non-profit. Research has not found that the business receives any other special funding, and likely most of the funding comes from the sale of coffee and merchandise.

3.2.4 Analysis

The author analyzed the three benchmarks based on a set of criteria important to both the literature and Soalheiro’s goals for the project. The categories of analysis were integration, representation of local culture, communication of values, community involvement (networks), products, and innovation. The assessment is presented in Table 1.

Table 1 Benchmark Analysis

		Winable	L’Olivera	Bitty & Beau’s
Legend ++ Excellent + Good = Average - Below Average -- Poor	Integration	+	++	++
	Local Culture	++	+	-
	Communication	+	+	+
	Community	=	++	-
	Products	+	=	=
	Innovation	+	=	+

All three benchmarks demonstrate successful integration, with L’Olivera and Bitty & Beau’s scoring higher because of the larger scale of their initiatives. While Bitty & Beau’s embraces the American coffee shop culture, it fails to incorporate the unique traditions of the cities it inhabits. This resulted in below average assessments both for community involvement and local culture, as their franchise model offers a standard product regardless of location. All three benchmarks were determined to have good communication of values, though they take very different approaches. While Bitty & Beau’s incorporates their integration initiative into all communication, L’Olivera chooses to keep it nearly

hidden, focusing first on the product. Winable, in turn falls somewhere in the middle. The three projects successfully follow the experiential strategy highlighted in the literature, with their brand values being best communicated through the consumer's experience with the product.

Given the analysis of the benchmarks and the literature, the author identified several strategies important for the proposals. The first is the importance of involving the local community and representing local culture. Responsible tourism should respect and include host communities, while recognizing that local traditions differentiate the tourism offer from that of other regions. Successfully demonstrated in both Winable and L'Olivera, highlighting local culture not only valorizes the community but also generates a unique tourism experience. The quality of products is also important. Without visitors social tourism ventures cannot be successful, and it is therefore necessary to offer guests good experiences that they will want to pay for. Another important strategy is that of communicating through experience, as previously highlighted in all three benchmarks. Project Germinar must communicate its values in a way that is meaningful, without being exploitative. Finally, all three benchmarks think outside the box, emphasizing the importance of creativity when it comes to social projects.

4. CONTEXT

Understanding the context in which this project will be developed was crucial to the creation of the proposals. Over the course of the internship, the author gathered the contextual data through daily work, organic conversations, and unstructured interviews with the team at Soalheiro. This context included the status of Casa Vigia, the history of the area, Soalheiro's goals for the project, the existing regional offer, and the profiles of any local actors that could also be involved.

4.1 Casa Vigia and Quinta de Germinar

Casa Vigia is a small, abandoned house in the town of Valença that used to serve as an observation point for the railroad that ran through Portugal. The property is managed by *IP Património*, a subset of *Infraestruturas de Portugal* which is the public entity managing Portugal's infrastructure. IP Património is responsible for managing train stations as well as heritage sites related to the railroad (IP Património, 2021). The organization recently granted Soalheiro the rights to renovate and use the property. The house has a strong foundation but needs many repairs. To be used as a tasting room structural work must be done including repairing the roof, replacing doors and windows, reinforcing the foundation, installing a bathroom, and connecting the building to electricity and water. Additionally, it will require a lot of aesthetic work, both inside and outside. To make the most use of the space, outdoor seating and parking areas need to be created. A photo of Casa Vigia can be seen in ANNEX 1.

What is important to note about Casa Vigia is its strategic location. The railroad that previously ran through this area has been turned into the *Ecopista do Minho*. Managed by IP Património, Ecopistas are a system of walking and cycling paths that are usually created from old railroads, canals, or roads. The Ecopista do Minho is a particularly celebrated stretch of greenway, coming in third place for the

best green way in Europe in 2017 (IP Património, 2021). Casa Vigia sits directly on a stretch of this Ecopista that runs parallel to Portugal's N101, a major national roadway. This places Casa Vigia in an important location to attract attention from people utilizing the Ecopista do Minho, as well as motorists on the main road to Melgãço. A map indicating the location of Casa Vigia can be seen in ANNEX 2.

Quinta de Germinar is the name given to António's vineyards where the integration initiative occurs. These vineyards have a unique history as part of one of Portugal's largest and most successful *emparcelamento* projects. *Emparcelamento* refers to a large consolidation and replanting initiative orchestrated by the DGADR, Portugal's Department of Agriculture and Rural Development (DGADR, n.d.). Under this initiative, small plots of land owned by different people are consolidated into one large plot and replanted with a crop that the DGADR deems will be best suited to grow there. Each landowner receives a piece of the parcel that correlates to the size of their original plot of land. In the 1960s, the planting of these vineyards was one of the first *emparcelamento* projects in Portugal, and the very first in Valença. Walking through the vineyards, one can see the markers indicating different owners for different rows of vines. Some owners own as little as two or three rows. This patchwork collection of owners is symbolic of the important grape growing culture of the region. Rather than big industrial farming operations, most vineyards are owned by small families and passed down from generation to generation, even if it's just a few rows of vines. António's vineyards were passed down through his family, though he also takes care of neighboring plots.

4.2 Company Vision and Goals for the Project

Soalheiro has several goals for the creation of the tasting room. The first, and arguably most important, is the valorization and expansion of Project Germinar. Through this they want to continue with their innovative contributions to the sustainable development of the region. Recognizing wine tourism as a marketing and communication tool, they want the tourism offer to create a special identity for the project and the wines from these vineyards. Finally, they view the tasting room as a way to convey the company's sustainability efforts in an authentic way, enhancing its brand value.

One of the main motivations behind the transformation of Casa Vigia is to grow Project Germinar. The tasting room will provide more employment opportunities for people with intellectual disabilities, magnifying the impact of the project and providing positions for those not suited for vineyard work. Additionally, giving Project Germinar its own tasting room will valorize the project, making it more than just a social initiative under Soalheiro, but giving it a distinct identity. Here visitors will be able to see the vineyards and the special work that goes on there first-hand. Visits should communicate the principles of Project Germinar and give value to the project. One of the goals stressed by the winery is to have Project Germinar become economically self-sustainable, which will be made more realistic by the revenues generated in the tasting room. Economic sustainability for the project will emphasize the idea that it is not about charity, but rather about respecting and honoring the hard work of this group of people. Further, a tasting room where visitors and mentally challenged members

of this project can interact will help to emphasize the integration initiative. Encouraging these types of interactions will hopefully push to change negative stereotypes about intellectually challenged individuals, especially in the surrounding communities.

With the 2020 vintage, Soalheiro will release a new range of wines under the name *Germinar*, made from grapes of the Loureiro varietal and sourced from António's plots. This represents a big change, as the winery has never produced and sold a wine that does not contain Alvarinho. Additionally, these Loureiro grapes come from a terroir with Atlantic influences, which is starkly different from the terroir where they source the Alvarinho grapes, which is a valley free of oceanic influences. With the Project Germinar tasting room Soalheiro wants to communicate the new range of wines, with their new varietal and new terroir.

Though Project Germinar and its wines are part of Soalheiro, the company recognizes that it is important for the project to have its own identity. The goal is to give the initiative its own personality while still fostering its connection with Soalheiro and using this as a means of communicating the winery's sustainable values. Having their own shop and tasting room space should distinguish Project Germinar and the new Germinar wines as their own brand, but still maintain their connection to the company. Through this delicate balance, the hope is to improve Soalheiro's overall brand value as a business that is committed to social sustainability and the development of the region.

4.3 Region

The site of the Project Germinar tasting room is in northwest Portugal, very close to the border with Spain (Galicia), which is marked by the Minho River. Valença is located in the Vinho Verde demarcated region, the largest (geographically) demarcated wine region in Portugal. Wines from this region either fall under Vinho Verde DOC or Minho IGP classifications, with DOC wines being more limited in varietals or winemaking styles allowed. Vinho Verde is known for producing light bodied white wines with lower alcohol levels, though some light bodied red wines are also produced. The name *verde* (green) refers not only to the youthful nature of the wines, but also the abundance of vegetation in the region resulting from higher levels of rainfall and cooler temperatures. Vinho Verde has 9 subregions, with Soalheiro being part of the Monção and Melgaço subregion, known for its success with the Alvarinho varietal (CRVV, 2021).

Valença is located just over 30 km from Soalheiro, placing it just outside of the Monção and Melgaço subregion, as seen in the map of the Vinho Verde subregions in ANNEX 3. As part of the Viana do Castelo district, Valença is about 120 km from Porto and about 40 km from Ponte de Lima, one of the oldest towns in Portugal (Município Ponte de Lima, 2021). Valença's location can be seen on the map in ANNEX 4. Its population in 2019 was 13.290 inhabitants (Câmara de Valença, 2021).

In general, tourism in the Monção and Melgaço region includes agrotourism, wine tasting, cycling and outdoor activities, and local gastronomy. The town of Valença boasts its own unique tourism offer focused on the *Fortaleza de Valença*, an old military fortress. This fort has about 5 km of

stone wall that encloses an old town in the center, where visitors can walk and enjoy a variety of shops and restaurants. Home to a large portion of the Ecopista do Minho, Valença provides many opportunities for outdoor activities such as running and cycling. There are several parks to enjoy views of the Minho River and even go fishing. Additionally, given its proximity to Spain, the town is a stop along the *Camino de Santiago* and receives visits from pilgrims on their way to Santiago de Compostela (Turismo de Valença, 2021). There is only one other winery offering wine tourism near Valença (Adega Edmundo Val, 8 km away) and no offers combining social projects with tourism. Unfortunately, public transportation to the area is limited, and most tourists arrive by car.

4.4 Market

Soalheiro's initial strategy is to focus on their existing wine tourism market. This could expand to include other markets once the tasting room is operating successfully and there is a more complete marketing and communication strategy developed. Based on the visitor reports from 2019 and 2020, most visitors arrive from Portugal. Nearly 75% of visitors in 2019 and nearly 85% of visitors in 2020 were Portuguese speakers (Soalheiro, 2020; 2021). Given the COVID-19 situation of 2020 it is not surprising that most visitors that year were nationals, but overall the data from both years indicates that the majority of the market will be from within Portugal. During the summer months more English and French speaking tourists will arrive, likely on day trips from Porto.

It is important to note that one major difference between Casa Vigia and the Soalheiro winery is location. While Soalheiro is in a small village and a somewhat hidden, Casa Vigia sits on the main road connecting Valença to Melgaço. Its proximity to the national road and the Ecopista suggests that the tasting room may attract more spontaneous visitors who are passing by on their way to or from Melgaço. This could lead to more international arrivals, particularly those from Spain, as Valença sits close to the Spanish border. It could also lead to more visitors from Porto as they must pass Casa Vigia to visit any of the wineries or other sites in Monção and Melgaço.

4.5 Potential Partnerships

As discussed in the literature about social entrepreneurship, these projects benefit greatly from the development of networks for resource acquisition and general support. It was therefore important for the development of the proposals to identify what types of collaborations Soalheiro values and wants to continue, as well as local actors that could contribute to the project.

APPACDM. The APPACDM is a non-profit organization committed to helping and integrating people with mental disabilities. There are independent branches of the organization all over Portugal, but the one serving Soalheiro's region is the APPACDM branch in the district of Viana do Castelo. This branch oversees a variety of integration and aid projects, including residences, occupational training centers, and psychological and therapeutic services. The organization centered in Viana do Castelo manages several smaller delegations in the region, including ones in Monção, Melgaço, and Valença (AAPACDM de Viana do Castelo, 2013). Currently, Project Germinar works in collaboration with the

APPACDM delegation in Valença with António Matos facilitating the partnership. As the project expands there is the opportunity to work with other delegations.

Local Governments and Public Offices. There are a variety of public offices that could support the project. This support can come mostly in communication, coordination with other businesses or tourism offers, and possibly even public funding. The first to recognize is IP Património, as introduced previously, which provides the contract for Casa Vigia. As the management entity for such heritage sites, they will oversee the conditions of the remodeling project.

Other potential actors to consider could be local governing bodies as well as public tourism offices. The most crucial would be the *Câmara Municipal* (town hall) of Valença. As the governing body of Valença it oversees the town's governmental operations, but also manages its tourism office. Their collaboration could help communicate the tasting room to visitors while also facilitating possible synergies with other local tourism providers. Other local governments and their tourism offices, such as the Câmara Municipal of Monção or Melgaço, could bring further support. Additionally, tourism organizations at the regional level could be beneficial for bringing awareness to the project. Examples include *Porto e Norte* and the *Associação de Turismo do Porto e Norte* (Porto Convention & Visitors Bureau), two organizations dedicated to facilitating tourism in northern Portugal (Turismo do Porto e Norte de Portugal, 2021; ATP&N, 2021).

Universities. As part of their ongoing contributions to the region, Soalheiro welcomes collaboration with universities and other higher education institutions by accepting interns from study programs of wine tourism and oenology. The company wants to integrate interns into Project Germinar as well. In this case, fields of study could be expanded to include interns of social work or even architecture at various stages of the project. Example institutions include *Universidade do Porto*, *Instituto Superior Miguel Torga*, *Instituto Politécnico de Viseu*, and *Instituto Politécnico de Viana do Castelo*, all of which offer programs in either social work, wine tourism, or architecture.

Businesses. For support, such as physical or financial resources, Soalheiro can look to other companies operating in the region. To begin, it will be easiest to focus on companies that Soalheiro already partners with. Examples include Amorim, a Portuguese cork producer, and Tintex Textiles, a local fabric producer. Recently, Soalheiro partnered with Tintex to develop an alternative to leather, made from used Alvarinho pomace. Outside of Soalheiro's existing partners, other companies could include local restaurants, hardware stores, wood suppliers, or even other wineries. The hope is that these businesses will provide materials for the rehabilitation of Casa Vigia, as well as possible financial donations, communications about the project, or even connections to other interested parties.

Local Producers. Soalheiro serves several local products in its existing tasting room, which will be continued in this new project. Currently, they partner with *Quinta de Folga* (a traditional smoked meats producer), *Prados de Melgaço* (a cheese producer), and *Mel do Zé* (a honey producer). These networks can be expanded to include other local food producers, as well as local artists who would like to sell pieces in the shop.

5. PROPOSALS

Taking into account the relevant literature, benchmarked examples, master's studies, and contextual analysis, the author first developed a general concept for the tasting room at Casa Vigia. The space will have a casual café/wine bar environment. There will be a counter, a shop space, and various tables and chairs both inside and outside on the terrace. Guests can enjoy a glass of wine and a plate of local delicacies while they watch the sunset, or they can have a more detailed wine tourism experience. It will be a place where visitors can buy Soalheiro wines and local products. The staff will include mentally handicapped members of the local community. There will also be several regular positions for interns, particularly in wine tourism and social work, giving practical experience to local students. Additionally, the tasting room will serve as a space for events to benefit the local community. Revenue from the shop will contribute to the goal of making Project Germinar economically self-sufficient. The project should be developed with local support (government, businesses, community) in order to create a real community project that is not charity, but rather valorizes the hard work of these people. The general concept proposal is presented in ANNEX 5.

To make this concept a reality, the author developed proposals for the action plan, tourism strategy, and business model. Given the length of the proposals, the following sections will be a synthesis of their main points with the full texts presented in ANNEXES 6, 7, and 8.

5.1 Action Plan

A crucial step to develop the foundation of the project was defining what actions needed to be completed to transform Casa Vigia from an abandoned house to a functioning tasting room. The action plan proposal was created to identify the key tasks needed, with proposals for strategies for many of the tasks. The action plan defines two main phases: restoration of the physical space and daily operations.

5.1.1 Physical Space

This covers the tasks needed to restore Casa Vigia to a safe, functional tasting room space.

5.1.1.1 Creating and Securing Partnerships

As highlighted previously, networks are extremely valuable for social enterprises, offering wider access to resources and lessening costs. In the case of Project Germinar, one of the goals is to make this a community project, one that really feels like a collaborative effort that the community can be proud of. This means involving as many local entities as possible for contributions to the project, no matter how big or small. This will lessen the initial investment needed by Soalheiro, help ensure the self-sufficiency/economic stability of the project, and create bonds with the community. Contributions can be in the form of money, materials for rebuilding the space, materials for the tasting room, volunteer labor, knowledge and skills, or anything else that can lessen burdens on the project. These partnerships will start with the renovation and design of the physical space and will carry on to other parts of the

project wherever possible. Sources for partnerships include local businesses, public offices, and local universities, and are detailed in the annex.

5.1.1.2 Rehabilitation of Casa Vigia

The rehabilitation of the space will be a part of the volunteer and integration aspect of the project. It will not be something that is just paid to be done, but rather a fluid process involving different members of the community.

Structure. The project will need to redesign Casa Vigia to make it suitable as a tasting room. This should consider the safety of the structure, a bathroom, entrance and exit, serving area, seating area, a terrace, and parking. For the structural design, Soalheiro can look to local architecture schools to find students willing to design the space as part of an internship or project. Raw materials will be sourced from donations as much as possible, with the initial investment of Soalheiro covering the rest.

Interior and Exterior Design. To truly integrate the mentally handicapped members of the project, the aesthetic design of the space should include their input. The proposal therefore includes two options, which can even be combined. The first is to partner with a local interior design school to have the students create proposals for the design of space. The mentally handicapped members of the project can then vote on which design they like best. The second option is to have the mentally handicapped community design the aesthetics themselves in partnership with local design students. This can result in something like the current Germinar wine label, pictured in ANNEX 9. With either option, the goal is to include their input as much as possible to really make the space theirs.

Volunteer Days. Apart from incorporating local architecture and design students, the labor for the rehabilitation of the house should come from volunteers on special “volunteer days.” These days will feature community members, employees at Soalheiro, members of the APPACDM, and anyone else who wants to participate. On these volunteer days contributors will work on tasks such as cleaning of the property, basic construction, painting, building or repurposing furniture, and decoration activities. More delicate or intricate tasks will, of course, require professionals. The purpose is to make the tasting room a true community space that involves everyone.

5.1.2 Operations

The operations section proposes how the tasting room will be operated on a daily basis.

5.1.2.1 Staffing

The primary goal of this project is the integration and personal development of the local mentally handicapped population. With that in mind, the tasting room should employ as many members of this community as possible, taking into account their skills and limitations to provide a work environment that is safe, beneficial, and effective for everybody.

Hiring. António must first be consulted to see what members of the handicapped community he believes will be suited for the project and what their abilities are. He will act as technical lead for the project, working with staff members to ensure their needs, skills, and safety are always respected. Other

staff will have to be hired for the project, which can include both wine tourism staff as well as social workers. Additionally, the project will include intern positions for both wine tourism and social work, offering students from the local community practical experience.

Training. Training will be integral to the successful operation of the tasting room. António will lead training for mentally handicapped staff, making sure they know how to perform their jobs safely and keeping in mind their limitations. Depending on their skill level, these staff members can perform tasks such as greeting and engaging with guests, cleaning tables and tasting spaces, handling payments, preparing food and beverage items, serving guests, assisting in tours, preparing products, and helping with special events. The goal is to integrate these members as much as possible and avoid any situations that present the image that they are “less” than other staff. The project will offer training in service and hospitality to all employees, including social workers and mentally handicapped staff. Additionally, members of the staff will receive sensitivity training focused on working with handicapped people.

5.1.2.2 Products

The tasting room will generate revenue through the sale of wine tourism activities as well as wines and local products.

Wine Tourism. The wine tourism offer will promote a community space, convey the mission of the project, and communicate the historical and cultural identity of the region. It will consist of a regular offer as well as special events. The details are further outlined in the tourism proposal.

Products for Purchase. The tasting room will focus on local products for purchase and consumption. These will include Soalheiro wines (focused on Germinar wines), Soalheiro herbal teas, local food items, as well as the possibility of other handcrafted items. More details are in the annex.

5.1.3 Budget and Marketing Plan

What also must be considered for this type of project are the budget and marketing plan. These aspects were outside of the time constraints of this academic work, but the author recognizes their importance and notes that they should be developed alongside Soalheiro’s final project plan, before implementation begins. The budget will be dependent on what partnerships, donations, and materials are secured for the project, as Soalheiro’s investment will depend on what needs remain. In relation, the marketing plan should have two aspects. One will be a strategy for communicating the project to potential partners and the other for communicating to visitors. The first plan will be crucial from the beginning for securing partnerships. The second plan can be developed once work has started on the project, though Soalheiro must keep in mind that the communication strategy can affect the tourism offer, depending on what markets they choose to target. The author left space for these strategies to be considered as part of the final project plan with some suggestions, which can be seen in the action plan proposal in the annex.

5.2 Tourism Strategy

The tourism strategy proposal focuses on communicating the values behind Project Germinar and the region. These values are integration, community, history, culture, and growth. Project Germinar represents growth, or germination, on several levels. It is the opportunity for development for a unique community, as well as Soalheiro's own growth as a company and into the new terroir of Loureiro. The tasting room will be a representation of the community, a space where local culture and products are celebrated and people feel their history and traditions recognized. This strategy proposes a regular offer, special events, and explains the project's placement in the larger destination strategy.

5.2.1 Regular Offer

As previously described, the Project Germinar tasting room will be a wine bar with a café like environment. Guests can buy Soalheiro wines, herbal teas, and other local products. They will also be able to enjoy a variety of tourism experiences, both offered daily and on special occasions. There will be a service counter where guests can place orders and then take a seat to be served at a table. Similar to Bitty & Beau's, a visit to the tasting room will be an experience in itself and considered part of the tourism offer. This section outlines the proposed daily offers.

Wine Tastings. Guests will be able to order wines by the glass that can be paired with local products, such as a meat or cheese platter. They will also be able to order pre-set wine flights to be paired with a guided tasting by a staff member. These wine flights will have themes that highlight the special terroir. For example, a flight comparing Alvarinho and Loureiro single varietal wines or a flight featuring the full range of Germinar wines. Guests will also be able to design their own flights.

Herbal Tea Tastings. Soalheiro's line of herbal teas pays respect to the region's herb growing culture. Visitors will be able to order the herbal teas by the tea pot or in special tasting flights. This presents the opportunity for staff to explain the herbal tea production process and the history of herb cultivation in the region.

Picnics in the Vineyards. Visitors will be able to reserve a special picnic basket to enjoy in the Quinta de Germinar vineyards. The basket will include a bottle of wine and local delicacies. There will be designated spots in the vineyard for picnics, and staff members will guide visitors to the spots while giving a brief history of the vineyards and the region.

Walking Tour of the Vineyards. Walking tours will take advantage of the natural beauty of the area and the Ecopista that passes in front of Casa Vigia. Guests will be lead on a walk around the area, given a brief history of the vineyards, and will finish with a tasting of a Germinar wine.

Other Opportunities. As the project grows other tourism offers can be developed. One possibility is partnering with a local bike rental company to offer rentals from the tasting room. This could take advantage of the Ecopista and include bike tours that start and end at Casa Vigia. Another possibility is connecting the tasting room with other offers of *Enotour*, Soalheiro's regional tourism

development project. Enotour, still in the works, will be a network of local high-quality tourism offerings and will be an excellent source of synergy opportunities for the tasting room.

5.2.2 Special Events

Because the tasting room should emphasize and represent a feeling of community, the space should function as well as a community space and collaboration point for locals. One way to do this will be to host a variety of special community events at the tasting room. The space can be available for rent to members of the community, but also will feature events planned by the tourism team. This section outlines possibilities for such events.

Build, Decoration, and Clean Up Volunteer Days. As described in the action plan, these “volunteer days” will be opportunities for volunteers from the community to contribute to the space. It will begin during the rehabilitation project for Casa Vigia but can continue after periodically. “Clean up days” can be organized to clean trash or plant gardens near the tasting room. This could also extend past the space of Casa Vigia, using the house as a meet up point before heading to other parts of the community to do such projects.

Art Workshops. The tasting room can be used for occasional art classes for mentally handicapped members of the community, or for anyone else who wants to join. The project will partner with a local art teacher or social worker to lead classes. Possible art projects can include paintings, painted pottery or coffee mugs, wine related items (such as decorating chillers or stoppers), or even arts made from repurposed products (such as corks, or old wine bottles).

Paint Nights. Paint nights are special events where participants are provided with a canvas and paints while an art teacher instructs them how to paint a certain picture. In the United States they are popular with young adults, as they are usually held at bars or restaurants and visitors can enjoy a drink while they paint. The tasting room can offer something similar where the profits from ticket sales go back into Project Germinar and guests can buy wine by the glass during the event.

Live Music. During the better weather seasons the tasting room can feature live music outside on the terrace. Preferably this would be local artists, or even students, to highlight local talent. There can also be live performances of other types of art, such as comedians or even local theater groups.

5.2.3 Destination Strategy

The destination strategy refers to how the project will contribute to the region’s tourism offer. Given the lack of a similar offer, particularly no other socially motivated tourism products, the tasting room will help bring diversity. With its inclusive nature and location on a national road it will attract a wide variety of tourist markets and locals alike. By showcasing local producers to a range of visitors, the tasting room can become a central tourism destination for visitors to learn about the region’s culture and traditions. Further, its success will hopefully encourage other providers in the region to develop their own inclusive tourism products. This strategy is detailed further in the tourism strategy proposal in the annex.

5.3 Business Model

The purpose of the business model proposal for the Project Germinar tasting room is to communicate the many ways this project can capture and create value for its stakeholders. As previously mentioned, it was developed based on Daniele and Quezada's (2017) proposed BM for social entrepreneurial enterprises. In this summarized version the building blocks highlighted are value proposition, key activities, key partners, key resources, and cost structure, with the remainder available in the annex.

5.3.1 Value Proposition

The value proposition is the core of any social enterprise's strategy. It identifies what value Project Germinar will create with its tasting room, explaining how stakeholders benefit from the project and how the final consumers' needs will be satisfied. The main stakeholders in this case are the intellectually handicapped community integrated into the project. The final consumers are the visitors to the tasting room. Other businesses and members of the local community can also benefit.

Social Value. For the cognitively disabled members of the community there are several value propositions. By working in the tasting room, they will gain personal and professional skills and the opportunity to integrate into society that they may not have previously had. Through wages they not only benefit financially, but also earn a sense of autonomy and responsibility.

The interactions between visitors to the tasting room and the special staff will create shared social value for both sides. Visitors will enjoy local products and form a lasting and authentic connection with the region and its people. Both groups will benefit from a stronger sense of integration and more acceptance of people with disabilities, working to remove the stigma that people with disabilities are less capable, which benefits everyone. Additionally, interns will benefit from practical experience in a truly unique work environment.

As added social value, locals will benefit from the recognition of their culture and region. Particularly, the tasting room on the vineyard site celebrates the local grape growing traditions. By offering local products, local producers will have their efforts and culture recognized and appreciated, contributing to the identity of the region and the sustainability of its culture.

Economic Value. While the focus is on social value, it is important to address economic value. This economic value refers both to what monetary value visitors place on the products offered, but also how the tasting room will be economically valuable to Project Germinar. It is important that the products have a high economic value so that visitors will pay for them. Guests will enjoy the pure pleasure of a glass of wine in a beautiful space, but also can purchase high caliber local products they may not be able to find outside of the region. The value will therefore come from quality as well as authenticity. Additionally, in a market where consumers are looking more often to patron businesses with defined morals, the ethical values of the project will add to the economic value of the products offered. Visitors will make positive connections with staff but also see first-hand who their patronage benefits.

The objective of the tasting room is for Project Germinar to be economically sustainable. This self-sufficiency in itself is value, as it takes the project from a place of charity to one of valorizing authentic and quality work efforts. Initial investments will be made (by Soalheiro and other local businesses) to get the project started. The tasting room will then generate revenue by selling tourist activities and products in the shop. This will be used to pay employees and purchase the necessary supplies. Wines and other products to be sold will be purchased by the tasting room from the producers. The suppliers will earn money from this relationship, but also added brand value, as association with a social project will reflect positively on their brand. In this sense any donations by local businesses will also generate value, as their involvement in a social project will improve their brand image and can encourage more conscious consumers to purchase from them.

5.3.2 Key Activities

The key activities are the repeated actions the business performs to deliver value, otherwise known as the value chain. In the case of social enterprises, value can be created *along* the value chain, not only at the end of the chain, making these key activities even more important.

Work in the Vineyard and Making of the Wine. Without António's initiative to incorporate adults with mental handicaps in his vineyard work, Project Germinar would not exist. The first key activity is therefore the employment of mentally disadvantaged people in the vineyards that produce Germinar. Value is created in this step, as it is part of the integration project but also produces wine for the tasting room. The wine made from this special plot gives value to the labor of these individuals, showing that their hard work can lead to a tangible product of high quality. Additionally, sourcing these grapes from a local vineyard owner works to maintain the wine-growing culture of the region, contributing to cultural sustainability.

Procurement of Products. Contributing as much to the local culture and community as possible, foods and products sold in the tasting room will be sourced from local producers. This will benefit them economically and culturally, recognizing their business efforts and heritage. Additionally, any products needed for the development of the physical space will be sourced from local producers (be it by donation or by purchase). Purchasing of wines from Soalheiro will also be part of the value chain.

Tasting Room Operations. The tasting room will feature tourism products that will communicate the uniqueness of Project Germinar and the region. The revenue from the shop will contribute to self-sustainability. Employing of mentally handicapped individuals will give them meaningful work opportunities and important social development. The tasting room will offer tourists the chance to enjoy the experience while also appreciating that their purchase has an important social benefit. Through integration, operations will contribute to global acceptance of disabled people.

5.3.3 Key Partners

As discussed in the literature, networking is important for social enterprises. It allows for a wider support and availability of resources and can help to expand the reach of the project. Consequently, there is also social value created for many of the partners by their inclusion in the project. Given the potential partnerships discussed in section 4.5, Table 2 highlights possible groups of partners and what they can contribute to the project. These partnerships are explored in more detail in the annex.

Table 2 Potential Partnerships

Partner	What can they provide?
António Matos & APPACDM	knowledge, skills, employees, networking
Public offices	marketing, networking, Casa Vigia, possible funding
Local businesses	materials, funding, marketing, networking
Local producers	products marketing, culture, labor support
Local universities & higher education	knowledge, skills, labor
Local community	culture, history, networking, knowledge, marketing, volunteer support

5.3.4 Key Resources

Social enterprises need resources in order to fulfill their value proposition. Acquisition of resources also presents the opportunity to expand their reach, by using a strategy that can expand their network and benefit other stakeholders in the process.

Economic Capital. Soalheiro will provide some of the financial capital needed to start the project, with the goal for it to eventually be self-sustaining. This economic sustainability will come through sales of products (tourist, wines, and local products) in the tasting room. Project Germinar will buy the wines and other products from their producers, just like a normal business, generating revenue from the profits of their sales. This emphasizes that the project is not focused on charity, but rather on the validation of the hard work of this special community. Additionally, sales of Project Germinar wines sold outside of the tasting room give a portion of sales back into the project.

Initial resources will come from donations from local businesses and offices, both financially but also for materials (labor, machinery, physical materials) for the renovation and design of the space. Any missing necessary resources will come from Soalheiro's initial investment into the project. The space for the tasting room comes from IP Património.

Human Capital. The organization and development of the tasting room will be handled by employees at Soalheiro, in partnership with António. Staff will include local mentally challenged people who will be contacted through the partnership with the APPACDM. The rest of the staff will be

comprised of António and other employees hired specifically for the project. There will also be positions for wine tourism and social work interns for additional support.

For the renovation and design of the space the project will utilize local architecture and design students, supported by Soalheiro's own architect. For activities involving construction and design, the strategy is to have "volunteer days," where locals from the community will volunteer to work together on simple projects. More intricate and delicate jobs will be assigned to paid professionals. These "volunteer days" will cover many parts of Casa Vigia's rehabilitation process such as cleaning, painting, and decoration. This will be a way to involve the local community in the process and develop a space that will be a point of pride for them.

Social Capital. Daniele and Quezada (2017) explain that social capital refers to the network and connections a social enterprise has that help it operate successfully. In the case of Project Germinar, generating social capital will involve developing the partnerships mentioned in the Key Partners section. António is a very important part of social capital, as he is the connection to the APPACDM and the vulnerable community members. His skills will be needed to operate the tasting room successfully. He also has access to other resources that can be beneficial to the project.

To develop the other partnerships mentioned, Soalheiro must begin with the connections they already have, such as Tintex or Amorim. These partners can connect the project to other partners, opening a network of doors that will provide access to valuable resources.

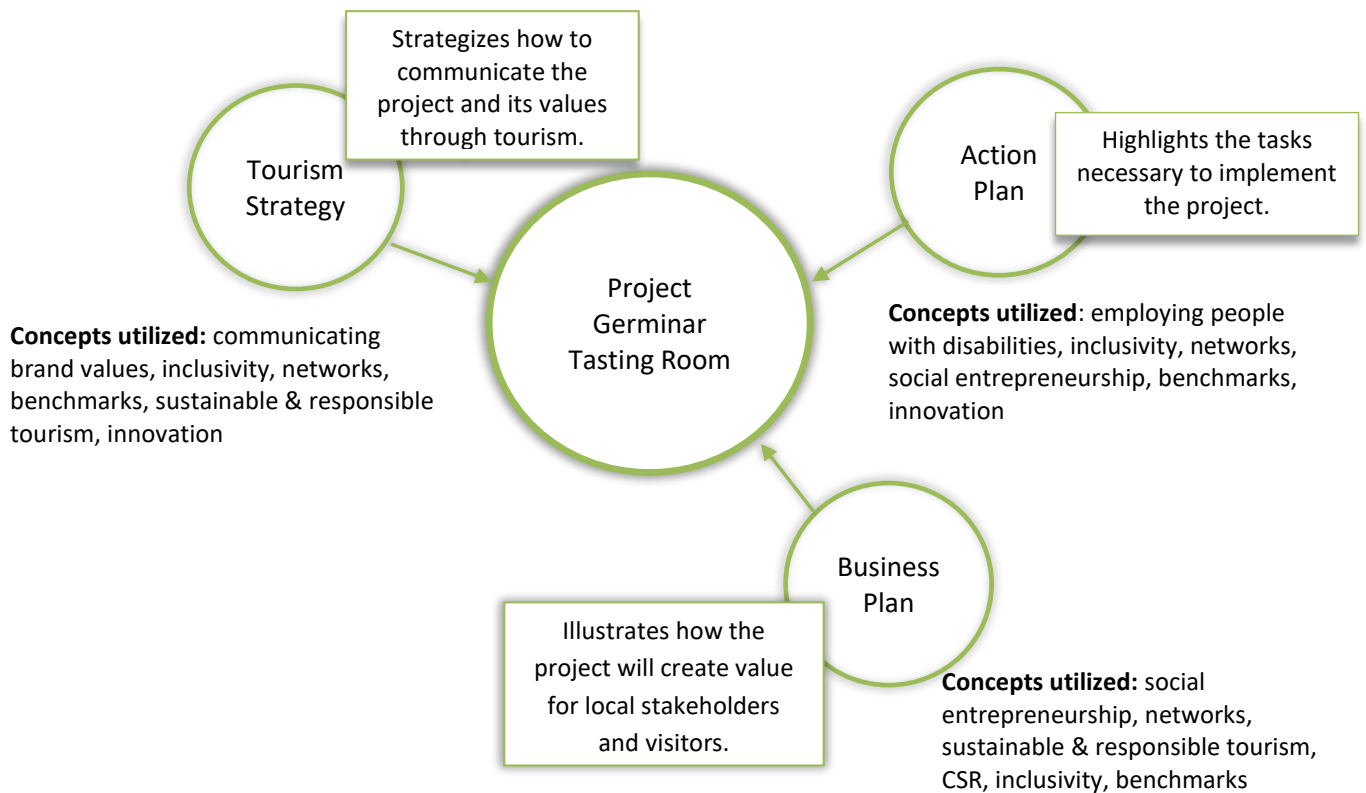
5.3.5 Cost Structure

The cost structure takes into account all costs incurred, both fixed and variable. Fixed costs do not vary with the volume of business, while variable costs vary. In this case the fixed costs will be any of the costs associated with the building, such as rent and utilities, and the salaries of the employees. The initial costs to restore the building, decorate the inside, construct or buy furniture, and purchase supplies will also be fixed, one-time costs. Variable costs will be the cost of the wine and any local products that would be sold in the tasting room, as the amount needed for purchase will be based on volume.

5.4 Summary

Figure 1 presents a visual summarizing the role of each proposal in the global concept of the project. For each strategical document there is a short description of its purpose, along with a list of what concepts from the author's theoretical research factored into its creation.

Figure 1 Graphical Proposal Summary



5.5 Company Response

Following a presentation of the proposals to the team at Soalheiro, the author and the team discussed their quality and feasibility. The author then presented the team with a follow-up survey. This survey collected the opinions on the quality, constraints, and practicality of the proposals. The survey questions are presented in ANNEX 10.

The proposals were well received by the team, with the consensus being that they were of very good quality. In terms of feasibility, the team was in agreement about what would be realistic to implement and what aspects would not be possible. The parts that were identified as most possible were the integration aspect, using Casa Vigia as a tasting room, making the tasting room a community space, using the natural offer of the area for outdoor tourism experiences, partnering with local producers to sell items in the shop, and partnering with local universities for internship opportunities.

The parts of the project that the team considered not as feasible sparked an interesting discussion. Several points were made about viewing this project in the “American reality” versus the “Portuguese reality.” As the author of this master’s thesis is from the United States, she viewed this project through an “American lens,” perhaps not fully taking into account the differences in cultures. The team was surprised at the example of Bitty & Beau’s, as such direct communication about an integration project would not meet the same response in Portugal. Communication strategies for Project Germinar, when developed, will therefore take a more subtle approach. The team also noted how the

call for volunteers to donate and work on the project without any clear returned benefit would be impossible. With this in mind, they acknowledged that in order for the project to be feasible Soalheiro would have to take a more central organizing role than was proposed. This would make commissioning partners slightly easier, as Soalheiro could look to their existing partnerships to help support the space, and also be able to fill any gaps where resources were scarce. Finally, though self-sufficiency for Project Germinar is the goal, the discussion suggested that its implementation may not be that simple. Soalheiro acknowledged that they would likely have to contribute more financially, particularly in terms of wine, than was considered in the proposals.

With these proposals developed, Soalheiro will move onto the next step of Project Germinar. They will take the action plan and convert it into a larger project plan, establishing more concrete partners, realistic tasks to be completed, a budget, and a marketing strategy. The final goal is implementation, taking into account the strategy proposed by the author with minor adjustments.

6. CONCLUSIONS

Meaningful business practices and social initiatives are becoming more and more important as society grows more cognizant of the problems (environmental, economic, and social) facing our planet. Focus on more sustainable and meaningful strategies should be more than just a marketing tool to gain consumers, but something that all companies consider to help combat the variety of issues plaguing our society. Tourism is not exempt from this movement. In fact, tourism presents many opportunities to help improve the planet. Through its experiential nature and ability to connect people from all over the world, tourism is one of the tools that companies and destinations should be using to communicate social and sustainable initiatives, increasing the magnitude of their impacts. The addition of a tourism component to Project Germinar proposes an excellent example of how an already successful social initiative can use the tool of tourism to expand its impacts and reach a wider audience.

The creation of the proposals for this project was not without challenges. The most difficult problem was timing. The author would have loved to see the project's implementation but given the time constraints of the academic work it was impossible. Even developing thorough proposals in this time frame proved a challenge. Given the COVID-19 pandemic, Portugal was in a state of lockdown during the first two months of the academic work, so little progress aside from remote research could be done. Additionally, as acknowledged in the previous section, developing these proposals as a cultural "outsider" was difficult. Without the cultural experiences and fluency in the language, some intricacies of Portuguese culture were missed by the author. Though she did her best to collect as much context and details as possible, it was her first time working in a Portuguese environment and she recognizes the parts of the proposal that are not congruent with the reality.

Regarding the implementation, the author is confident that Soalheiro will develop an outstanding tasting room for Project Germinar that will be an asset to the local community. The biggest foreseen problem, as previously discussed, will be coordinating networks and securing resources. In an

ideal world, this project will receive a lot of support from local communities, but this may be easier said than done. Additionally, bureaucratic processes may hinder and delay the project. For example, though Soalheiro technically has the rights to Casa Vigia, IP Património still has not released the property and no work on the house can begin until it does. Other issues may arise when it comes to contracts and negotiations with public offices, particularly regarding building a parking area. Finally, as this project touches on a delicate aspect of our society, it is possible that public response will not be as positive as the author and Soalheiro hope. Though this hopefully is not the case, initial responses may be skeptical. The author is sure, however, that with patience and hard work the Project Germinar tasting room will be very successful and meet the response it deserves.

This type of tourism-focused social enterprise has a number of benefits, both for the host community as well as the organizing company. If implemented in a way that follows the proposals outlined, the Project Germinar tasting room can bring a lot of added value to the area's existing tourism offer. As the first socially based tourist project, it will open the region to new markets who are looking for more responsible and conscious experiences. New markets can mean more tourist arrivals, and these tourists can spend money in other local establishments, contributing to the region's economic success. Additionally, sales of local products in the shop will benefit local producers and honor their work. As a space intended to communicate the region's culture, it will valorize and preserve the area's history and traditions. Further, through this project Soalheiro proves their commitment to the region and its sustainability, which will only improve the company's image and brand value.

Most importantly, this project will provide more opportunities for a group of local people who are often marginalized in their communities. By integrating people with cognitive disabilities into the work force, it not only contributes to their personal development, but it also works to erase the stigma that mental disabilities have in our society. As the first project of its kind in the region, the Project Germinar tasting room will serve as a benchmark in Portugal for tourism social initiatives, hopefully inspiring others to soon do the same.

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Annex 1. Photo of Casa Vigia



Source: Author

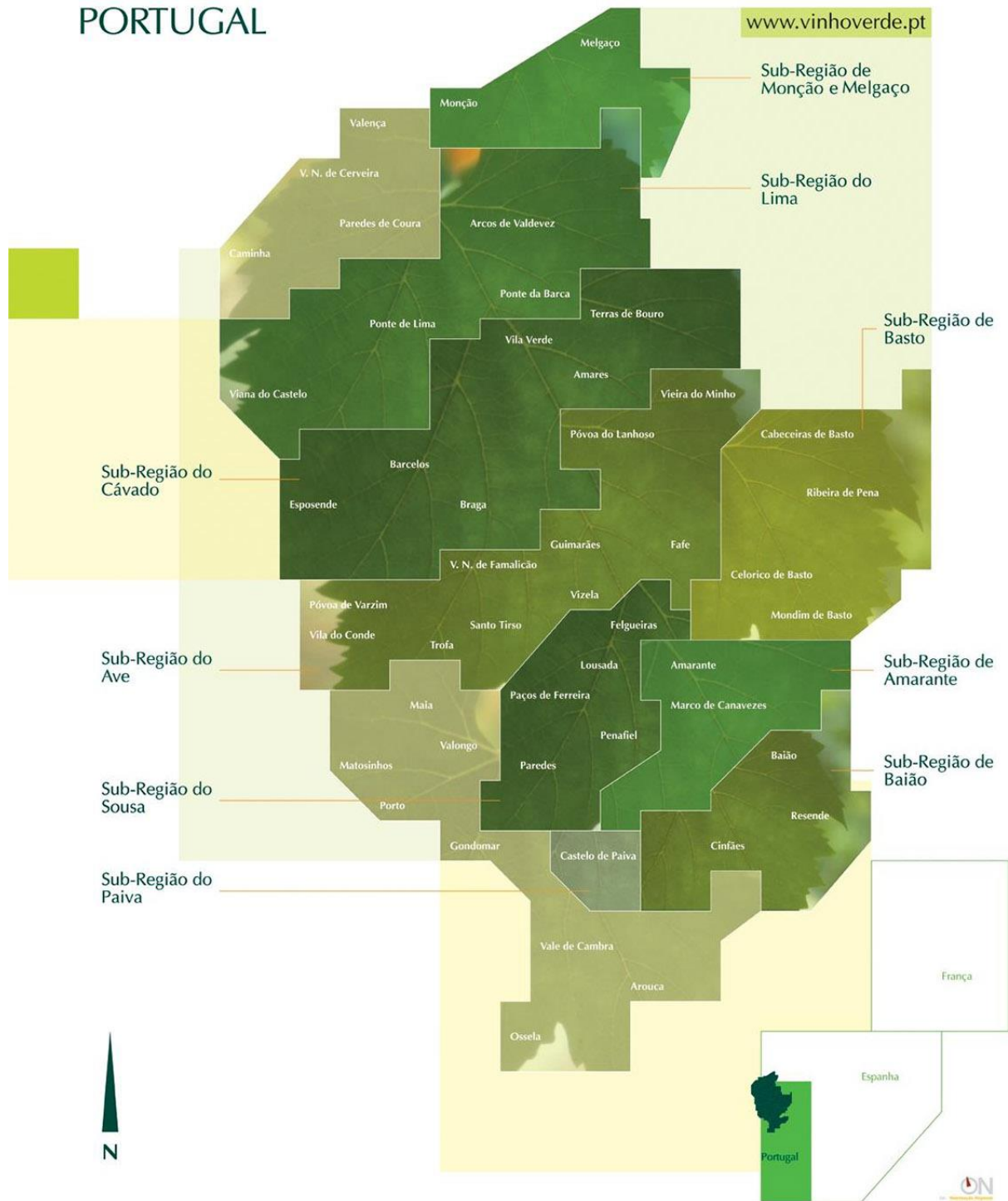
Annex 2. Map showing location of Casa Vigia



Source: Google Maps (2021)

Annex 3. Map of Vinho Verde subregions

Região Demarcada dos Vinhos Verdes



Source: Wine Enthusiast (2018) (<https://www.winemag.com/2018/07/31/vinho-verde-guide/>)

Annex 4. Map of northern Portugal



Source: Maps Portugal (2021) (<https://maps-portugal.com/maps-portugal-regions/northern-portugal-map>)

Project Germinar Tasting Room Concept Proposal

Objective

To use the *Casa Vigia* space to begin the next phase of *Project Germinar*.

- This next phase will involve expanding the project to have **more impact**, while also building a new, unique identity for the project and *Germinar* wines.

Goals of the Project

What do we want to achieve?

- More integration opportunities
- Stronger community impact
- New, stronger brand identity for *Germinar*
- Economic sustainability for the project

What do we want to communicate?

- The values of the project (integration, equal opportunities, a better life)
- The value of the people involved
- The quality of the wine
- The new terroir and its history
- The importance and identity of the community

Proposal

Transform *Casa Vigia* into a **tasting room and shop**, as well as a **community space**, featuring Soalheiro wines and herbal teas as well as other local products. The emphasis of the tasting room should be to communicate **integration, community, history, culture, and growth** as values of the *Project Germinar* brand through its unique integration project and tourism offer.

Concept

In this proposal, the *Casa Vigia* space will be turned into a tasting room with a **casual café/wine bar environment**. It will be a place where visitors can buy Soalheiro wines and herbal teas, as well as other local products, but also enjoy several wine tourism experiences. There will be a counter, a shop space, and various tables and chairs both inside and outside on the terrace. The rehabilitation process of the house will be a **community project**, involving as many local actors as possible. Once in operation, the staff of the tasting room will include intellectually handicapped members of the local community as an **extension of the current *Project Germinar* integration project**. There will also be several regular positions for interns from local universities. Guests will be able to enjoy a glass of wine and a plate of local delicacies while they watch the sunset, or they can experience a more detailed wine tourism experience. The rehabilitated *Casa Vigia* will also serve as a space for **events to benefit the local community**. Revenue from the shop will contribute to the goal of making *Project Germinar* **economically self-sufficient**. The project will be developed with local support

(government, businesses, etc.) in order to create a real **community project** that is not charity based, but rather valorizes the hard work of these people.

How will the goals be reached?



Key Strategies

- **Community involvement** in the rehabilitation of the building and the operation of the space
- **Integrating** mentally handicapped people as shop employees
- Forming and utilizing networks with local actors who also want to benefit the community (**getting others involved**)
- Developing a wine tourism offer that **reflects the values** of the project, as well as the history of the region and the new terroir of *Germinar*
- Selling local products in the shop, **valorizing local culture** and producers
- Creating a business strategy that promotes **self-sustainability**

The proposition for this project is divided into three strategical proposals:

- Action Plan
- Tourism Strategy
- Business Model

Annex 6. Action Plan Proposal

Project Germinar Tasting Room Action Plan Proposal

Introduction

This proposed action plan covers the main areas of focus that need to be addressed for the *Project Germinar* tasting room project. The purpose is to highlight the tasks that need to be decided and strategized in order for the project to develop successfully. It is divided into 4 main sections: **Physical Space**, **Operations**, **Marketing and Communication**, and **Budget**. Each section contains a general summary, sub-topics, and proposals for how to proceed.

Ultimately, the final strategy will be decided on by the Soalheiro team, and this action plan can be expanded into a more complete project plan to include details such as objectives, key deliverables, timeline, contracts, risk mitigation, resources needed, variables, and a more concrete budget.

Project Summary

The proposal is to turn *Casa Vigia* into a tasting room with a **social focus**. The tasting room will fall under the existing *Project Germinar*, with the goal of helping it become economically self-sufficient. As part of *Project Germinar's* **integration initiative**, it will employ mentally challenged individuals, while also serving as a space to **promote the local community and culture**. The project will be realized in two main phases: 1. the restoring the abandoned *Casa Vigia*
2. the daily operations of the tasting room.

THE ACTION PLAN

1. Physical Space

What steps are needed to transform *Casa Vigia* into a tasting room?

i. Creating and Securing Partnerships

Networks are extremely valuable for social enterprises, offering a wider access to resources and lessening the costs of a project. In the case of this *Project Germinar* proposal, one of the main goals is to make this a community project and community space. This means creating partnerships with locals (businesses, producers, governments, community members), so that it really feels like a collaborative effort the community can be proud of.

The proposal is to **involve as many local entities as possible** for contributions, no matter how big or how small. This will lessen the initial investment needed by Soalheiro, help ensure economic sustainability for the project, and also create lasting bonds with the community. Contributions can be in the form of money, materials, volunteer labor, knowledge, skills, marketing, networking, and anything else that may lessen the burden of the project. The contributions will begin with the rehabilitation process of *Casa Vigia* but will carry onto the daily operations of the tasting room.

a. Local businesses

Local businesses can supply funds, construction materials (machinery and physical materials), materials for the interior, needed products for operations (glasses, furniture, etc), volunteer labor, connections to other companies, and marketing and communication efforts.

Some proposals for possible local business partners include:

- **Tintex Textiles**: to provide funding, volunteers, and cloth materials that can be used for various purposes (covering furniture, tablecloths, items to be sold in the shop, uniforms for employees, etc.)
- **Amorim (cork)**: to provide funding, volunteers, and cork materials that can be used for various purposes (decoration, building materials, furniture building, items to be sold in the shop, supplies art projects for community members, etc.)
- **Hardware materials companies**: to donate materials for building the house (wood, cement, paint, tools, machinery, etc.)
- **Local restaurants**: to donate glassware or other products for service, perhaps used or old furniture that can be repurposed or revived
- **Any other local businesses**: to contribute funds, materials, volunteer labor, or anything else that can lessen the burdens of the project.

b. Governments and public offices

The project will require, but also benefit from, relationships with local public offices. For starters, the contract for *Casa Vigia* is provided by **IP Património**, and they will likely be involved in the rehabilitation of the house. Contracts and permissions for construction and general operation of the space will require collaboration with local government offices (particularly the **Câmara de Valença**). Additionally, the project can benefit from partnerships with local public offices, such as tourism boards and town halls, for the sake of publicity and communication, synergy with other tourism offers, and maybe even funding.

Examples of public offices who should be contacted for support include:

- **IP Património**
- **Câmara de Valença** (<https://cm-valenca.pt>)
 - **Turismo de Valença** (operated by the Municipal) (<https://visitvalenca.com/>)
- **Câmara de Melgaço** (<https://www.cm-melgaco.pt/>)

- [Turismo de Melgaço](#) (operated by the Municipal)
- [Comunidade Municipal do Alto Minho](http://www.cim-altominho.pt/) (<http://www.cim-altominho.pt/>)
- [Distrito de Viana do Castelo](#)
- [Porto e Norte \(Turismo do Porto e Norte de Portugal\)](http://www.portoenorte.pt/pt/) (<http://www.portoenorte.pt/pt/>)
- [Associação de Turismo do Porto e Norte \(Porto Convention & Visitors Bureau\)](https://www.portocvb.com/) (<https://www.portocvb.com/>)

c. APPACDM

The [APPACDM](#) is an important partner for this project. Currently, *Project Germinar* partners with the delegation in Valença, but expanding the connection to other branches, including Monção, Melgaço, and the main branch in Viana do Castelo will be helpful to spread the impact and reach more members of the mentally challenged community. This partnership **connects** *Project Germinar* with people to include in the integration project but can also provide publicity and communication about the project, as well as connections to other local businesses or organizations who may want to be involved.

d. Local schools and universities

Partnerships with local higher education schools and universities will be less about physical or financial donations, and more about volunteers, skills, and knowledge. Different parts of the project will have intern opportunities (to be discussed further in the proposal), which will allow outreach and inclusion of local students.

Examples of local schools and universities that could be partners:

- [Instituto Superior Miguel Torga](https://ismt.pt/) (social work) (<https://ismt.pt/>)
- [Instituto Superior de Serviço Social do Porto](https://www.issp.pt/issp/si_main) (social work) (https://www.issp.pt/issp/si_main)
- [Instituto Politécnico de Viseu - Escola Superior de Tecnologia e Gestão de Lamego](http://www1.estgl.ipv.pt/) (social work and wine tourism) (<http://www1.estgl.ipv.pt/>)
- [Universidade Portucalense](https://www.upt.pt/) (social work and wine tourism) (<https://www.upt.pt/>)
- [Universidade do Porto](https://sigarra.up.pt/up/pt) (social work, architecture, and wine tourism) (<https://sigarra.up.pt/up/pt>)
- [Instituto Politécnico de Viana do Castelo](https://www.ipvc.pt/) (innovative tourism design) (<https://www.ipvc.pt/>)
- [Universidade de Trás-os-Montes e Alto Douro](https://www.utad.pt/) (tourism) (<https://www.utad.pt/>)

e. Local producers

Local producers will be contracted to sell products in the tasting room, but they can also be a valuable asset for other resources. They can provide skills and knowledge of the area, volunteer work, marketing and communication of the space, as well as connections to other entities that may want to be involved.

Examples of local producers include:

- [Quinta de Folga](https://www.quintadefolga.com/) (traditional smoked meats) (<https://www.quintadefolga.com/>)
- [Prados de Melgaço](https://www.pradosdemelgaco.pt/) (local goat cheese) (<https://www.pradosdemelgaco.pt/>)
- [Mel do Zé](https://www.facebook.com/MelDoZe) (honey) (<https://www.facebook.com/MelDoZe>)
- [Local artists](#) can contribute to the design of the space or sell their art in the shop
- [Local bakeries](#) can provide baked goods to be sold and consumed in the tasting room

f. Local community

The project **cannot ignore the value of the local community**. Outreach must be done to incorporate as many local community members as possible. They can provide volunteer labor, as well as ideas for the space, knowledge and skills, and connections to other entities that may want to be involved in the project.

ii. Rehabilitation of Casa Vigia

The rehabilitation of the space will be a part of the volunteer/integration aspect of the project. It will not be something that is paid to be completed, but rather a fluid process **involving different members of the community** and resulting in several “volunteer days” (to be discussed in part g).

a. Architecture/structure of the building

Casa Vigia will need to be redesigned to make it safe and suitable as a tasting room. This process must consider safety of the structure, bathroom, entrance and exit, serving area, wine storage, seating area, and a building of a terrace.

This project can **partner with a local architecture school** to find students willing to redesign the building as a project or internship opportunity. If this is not possible, the project will utilize Soalheiro’s **environmentally and sustainability conscious** architects.

b. Utilities

The space will require water, electricity, and wifi. Ideally the utilities will be covered by donations from providing companies, but if not they will be part of the fixed costs of the business.

c. Parking

The project will need to work with the town to determine the best strategy for parking. A lot may be built next to the house, but the project must remain conscious of the *Ecopista* that passes in front of the house.

d. Interior and exterior aesthetic design

As part of the integrative nature of the project, the aesthetic design must include input from the mentally challenged community. The goal is to make this special community feel like this space is truly theirs.

Two proposals for the space's aesthetic design are:

- **Proposal #1:** Partner with a local interior design study program to come up with several proposals for the interior/exterior design of the space. Assemble a panel of local mentally challenged participants to vote on which design they like best.
- **Proposal #2:** Incorporating local design students with members of the mentally challenged community, the group can design the aesthetics of the space together. This could result in something in line with the current label of the *Germinar* wine.

e. Raw materials

Ideally, most raw materials will be sourced from donations or donated funds. Any materials not sourced this way will come from Soalheiro's initial investment.

f. Labor

As previously mentioned, the proposal is to source labor for designs from local university students as internships or projects. Including local youth will give them **more pride in their community** and help them to develop **a stronger tie to the region**.

For the work needed to rehabilitate *Casa Vigia*, the proposal is to create **volunteer days** (outlined in the next section) where local community members, mentally handicapped people, staff at Soalheiro, and anyone else who wants to be involved will come together to work on the house. More intricate jobs will require paid professionals (such as plumbing, roofing, electrical work, etc.)

g. Volunteer days

Volunteer days will be a way to involve as many members of the local community as possible, creating a **sense of community pride** in the project. It will also offer more opportunities to integrate local handicapped people who may not be capable of full-time employment in the tasting room. It aims to give the community ownership of the project and what is being developed.

Volunteer day tasks will include:

- **Clean up of the property** (picking up trash, planting flowers, etc.)
- **Basic wood working or construction tasks** (not requiring a professional)
- **Painting** (interior and exterior)
- **Building furniture or repurposing donated furniture**
- **Decoration tasks** (hanging pictures, setting up the space, etc)

2. Operations

How will the tasting room be run?

i. Business Model & Strategy

A business model based on business models for social enterprises has been developed. It focuses on how the project will capture and create social value for the main stakeholders.

Once the final strategies have been decided on, the project will also require a more formal business strategy to model how the tasting room will be generate revenue, with the goal of becoming **economically self-sustainable**.

The business strategy should take into account operational aspects of the shop, such as opening hours, opening days, what products will be offered when, and pricing.

ii. Staffing

One of the primary goals of this project is **the integration and personal development of local mentally handicapped people**. With that in mind, the project will employ as many members of this community as possible, taking into account their skills and limitations and making sure to provide a work environment that is **safe, beneficial, and effective for everybody**. Staff will include people with and without disabilities.

a. Hiring

To begin the staffing process, António Matos must first be consulted to see what members of the handicapped community he believes will be suited to the project and what their abilities are. Once the project has an understanding of how many handicapped members will be on staff, it can consider who else will work in the tasting room. António will perform the role of technical lead and senior staff member, working directly with the handicapped staff to make sure their needs, skills, and safety are always respected.

The tasting room will require people specialized in working with this population, as well as staff to carry out the tasks that are beyond the limitations of handicapped staff members. Proposals for such staff include:

- **Wine tourism staff** (some may come from Soalheiro, but likely this will require hiring more)
- **Social workers**
- **Students from local universities** (the project will include several fixed intern positions for students of social work as well as tourism. This will allow local students practical experience while also involving them in an important community project)

b. Training

Training will be **integral to the successful operation of the tasting room**. António will lead training for handicapped staff, making sure they know how to do their job safely and keeping in mind their limitations.

Depending on their abilities and skills, examples of jobs for the mentally handicapped staff will include:

- **Greeting and engaging with guests**
- **Cleaning tables and tasting spaces**
- **Handling transactions with the cash register**
- **Preparing food and beverage items**
- **Serving guests**
- **Joining and leading tours of the vineyards and surrounding property**
- **Preparing products** (gift boxes, picnic baskets, etc.)
- **Helping support special events** (set up, clean up, attending guests, etc.)

Once skills are discussed with António, this list can certainly be expanded. With staffing and training the project needs to take care that mentally handicapped staff are included and integrated onto the team. The project **must avoid any situation that presents an image that these staff are “less” than other staff**.

Training for all staff must also include:

- **Sensitivity training:** This will ensure that staff without handicaps know how to effectively work with this special population. This will include any social work and tourism staff.
- **Tourism/hospitality/wine training:** This will be for all staff of the tasting room, handicapped or not, including social workers. This will make sure that the level of service for guests is high, but will also be a point of value creation and integration for mentally handicapped staff. Following the benchmark Winalbe, handicapped staff will benefit and learn a lot from this kind of training that they may not receive anywhere else.

c. Payment

All regular positions will be paid, including mentally handicapped employees. This contributes to their successful integration, financial independence, and personal development.

Participants in volunteer days will be unpaid, and internships may be paid or unpaid, depending on their conditions.

As the project aims to be economically self-sufficient, salaries will be paid for by the revenue from the tasting room, just like a normal business.

iii. Products

The tasting room will generate revenue through the sale of **wine tourism activities**, as well as **wines** and **local products**.

a. Wine tourism

The wine tourism offer will promote a community space and communicate the mission and values of *Project Germinar*, the historical and culturally identity of the region, and the new wines produced from this terroir. A more comprehensive proposal for wine tourism activities is presented in the **wine tourism strategy proposal**. The tourism offer will be divided into two categories: regular offer and special events.

b. Products for purchase

The tasting room should operate like a normal business, so products to be sold in the space will be purchased from the producer by *Project Germinar* and the profit from their sale will fund the business. This will contribute to its economic self-sufficiency and not make the project appear as a charity. This will be further outlined in the eventual business strategy.

Products to be sold in the tasting room will include:

- **Wine:** Soalheiro wines will be sold, with an emphasis on *Germinar* wines.
- **Local products:** The tasting room will feature local food items to be sold or served in the tasting room. Additionally, there will be the opportunity for local artists to sell products as well. Products will come from local producers, some of which are highlighted in the previous networks section. This will provide the opportunity for local artisans' work to be valorized and important aspects of local culture to be celebrated.
- **Herbal teas:** Soalheiro's line of herbal teas (infusions) will be available for consumption or purchase.
- **Other products:** As a means of further benefiting the mentally handicapped community, this project can sell items made by members of this community in the tasting room. These products would be art pieces made during special art workshops (discussed in further detail in the wine tourism strategy proposal). This would be another way of valorizing their work and including more mentally handicapped members of the community in the project.

3. Marketing and Communication

How will the project be communicated?

The marketing and communication strategy for this project is outside of the realm of these proposals, but it is not something that should be forgotten about. *Project Germinar* and its tasting room should have its own communication strategy, to be developed alongside the plans for the project by Soalheiro's wine tourism and communication teams. It should focus

first on how to communicate the project to potential partners and networks, and then followed by how to communicate the project to visitors and customers. The tourism strategy is a part of the overall communication strategy, and the values that tourism aims to communicate should be the same values communicated in any marketing or communication techniques. Additionally, any market research that impacts the marketing plan can also impact the tourism strategy and even the design of the space. Marketing for this project is very sensitive, and should be communicated **delicately** and with **authenticity**, as to not make the tasting room appear like a stunt to promote Soalheiro's image.

Taking into account the status of the project, as well as Soalheiro's target market of current customers and visitors to the area of Valença, these are a few general proposals that could be included in a longer marketing and communication plan:

- Utilize Soalheiro's communication outlets, but communicate in a way that is not exploitative of the project. **Communication needs to be genuine** and not appear like it is just bolstering Soalheiro's image.
- *Project Germinar* should have its own section on the Soalheiro website, if not its own website. This will help develop its **own brand identity**.
- Give the tasting room its own social media space separate from Soalheiro in order to **emphasize its unique mission** and develop its own brand image.
- Create its own e-mail newsletter with news specific to the project. Additionally, segment the Soalheiro newsletter and send specific publications to guests who have voiced interest in social projects and send the *Project Germinar* newsletter to them.
- **Network with other local companies** and local tourism offices for promotion. Connections with other local companies will only allow for more communication possibilities and attention for the project, as they will communicate their efforts as well. Local tourism offices can help promote visits to the tasting room and even provide synergies with other local tourism products for more visibility.
- **Focus on subtle and authentic communication**. Do not look to put mentally handicapped members of the project on display, but rather make their integration as normal as possible.
- Connect the tasting room with *Enotour* (Soalheiro's developing tourism regional development project)

4. Budget



How will the project be paid for?

The budget was outside of the scope of this proposal and academic work, but it must be developed **before implementation of the project can take place**. The budget can be considered in **2 phases**. The first phase will involve the initial processes to rehabilitate *Casa Vigia*. This phase will require initial investments from donors (both financial and material), and during this phase *Project Germinar* will not be self-sufficient. Once donations and

support are accounted for, Soalheiro can calculate what it will need to contribute for an initial investment. The second phase will be the tasting room's standard operations, with normal fixed and variable costs. During this phase the project can hopefully become **economically sustainable and self-sufficient**.

Additionally, there are likely grants for social projects available at a country or EU level, or even from private companies. If the need for grant money arises, it would be beneficial to consider applying for such funding.

Project Germinar Tourism Strategy Proposal

Introduction

This proposal communicates the main parts of the tourism strategy for the proposed *Project Germinar* tasting room. It is divided into 5 main parts: **regular offer**, **special events**, **products to sell**, **staffing**, and **regional strategy**.

The goal of the tourism offer for this tasting room is to communicate the values behind *Project Germinar* and *Quinta de Germinar*. These values are **integration**, **community**, **history**, **culture**, and **growth**. *Project Germinar* represents growth on several levels.

For a special group of people it means the opening of new doors, growing and developing based on opportunities they may not have previously had. For Soalheiro, it is growth and exploration into a new territory: Loureiro from an Atlantic terroir. This is growth and rebirth of these Loureiro vineyards as well, recognizing the history of *emparcelamento*, bringing a fresh face to the Loureiro varietal, and embracing the region's winegrowing culture. The tasting room aims to be a representation of the **community**, a space where local culture is celebrated and local people feel their history and traditions recognized.

Strategy Overview

The tasting room in Casa Vigia will have a **café/wine bar environment** with a counter, shop space, and tables and chairs both inside and outdoors on the terrace. It will be a place where visitors can taste and buy Soalheiro wines and local products or enjoy several wine tourism experiences. The tasting room staff will include mentally handicapped members of the local community, providing the opportunity for integration as well as professional and social development. This will also be a space for **community events**.

1. Regular Offer

The regular offer will be **tastings, food and wine service**, and **tours of the surrounding property**. There will be a counter where guests can place their orders and then take a seat at a table. Other tourism products will be featured daily or determined by a schedule. The goal of the regular offer will be to celebrate the region and express the values of this integration project. Similar to the benchmark Bitty & Beau's, the environment should be **warm and welcoming**, and a visit to the tasting room will be **an experience in itself**.

Specific offerings will be as follows:

Wine tastings

- + Guests can order **wine by the glass**. This can also be paired with simple foods, such as a meat or cheese board.
- + Guests can order **wine flights**, either pre-determined or they can make their own. The flights will include a guided tasting by a staff member to point out the intricacies of the wine. Suggested flight themes:
 - Tasting of the **Germinar wines** to see the different expressions of Loureiro
 - Tasting and comparing **Alvarinho** and **Loureiro** (for example, tasting *Clássico* and *Germinar* side by side)
 - Tasting and comparing old vine **Germinar** and **Primeiras Vinhas** (old vine Alvarinho)
 - Tasting of different **Soalheiro Espumantes**
 - Tasting and comparing of the 2 **Ag.hora wines** (Georgian style wines), one with Alvarinho and one with Loureiro
 - Tasting of Soalheiro's line of **natural wines**

Herbal tea tastings

Before vineyards were so widely planted in the region, there was a **prominent herb growing culture**. Native plants were grown for culinary purposes or for herbal teas. Soalheiro's herbal teas (infusions) pay homage to that regional culture. In the tasting room they can be **sold by the teapot** (served in a special teapot), or in **tasting flights** of different herbs. Staff can explain to visitors the herbal tea production process and the history of herb cultivation in the region.

Picnics in the vineyards

Guests can reserve a **special picnic basket** to enjoy in the *Quinta de Germinar* vineyards. The basket will include a bottle of wine along with other local delicacies. There will be designated spots in the vineyard that can be used for the picnic, and one of the staff members will guide the visitors to the spot while giving them a brief history of the vineyards and the region.

Walking tour of the vineyards

The walking tours will take advantage of the *Ecopista* and the **natural beauty of the area**. Guests will be lead on a walk around the vineyards, given a brief history of the region and the vineyards, and will finish in the tasting room with one of the *Germinar* wines.

Other possibilities

This is, of course, not a final list of regular tourism possibilities. New offers should aim to communicate the same values of growth and community while celebrating the region and its history. Suggestions for possibilities in the future include:

- + Partnering with a **local bike rental company** to offer rentals from the tasting room, taking advantage of the *Ecopista*. The tasting room could even offer a bike tour that starts and ends at *Casa Vigia*.
- + **Connecting** the tasting room with other *Enotour* offerings, such as a tasting package with other regional wineries, or a wine tasting and lunch at a local restaurant. *Enotour* is Soalheiro's regional tourism development project that is still being created, but will be a network of local tourism offerings of high quality.

2. Special Events

The *Casa Vigia* space should emphasize and represent a **feeling of community**. The tasting room will therefore function as a community space and collaboration point for locals. The space can be rented for special community events, but it will also organize some of its own special events.

Proposals for these types of events include the following:

Volunteer days

As discussed in the action plan proposal, the rehabilitation of *Casa Vigia* will be a community effort. On these **volunteer days** (described in more detail in the action plan) volunteers from the local community (including mentally challenged individuals) will **come together** to work on the renovation and design of *Casa Vigia*. These volunteer days will not be limited to the construction process, however, and will extend to become a periodical part of the tasting room's special events. In this case, special **clean up days** will be organized where volunteers clean trash in the area or at a nearby locations, using the tasting room as a meeting and coordination point. This can also expand to include **gardening days** where volunteers can help plant flowers outside of the tasting room or in other nearby areas.

Special art workshops

The *Casa Vigia* space can be used for **special art workshops** for mentally handicapped members of the community (or for anyone who wants to join). The

project can partner with a local art teacher or social worker to lead classes where attendees can make projects that they **can either take home or sell in the shop** (described in the action plan and in the “products to sell” section of this proposal). Possible art projects include paintings, painted pottery or coffee mugs, wine related items (such as decorating chillers or stoppers), or **arts made from repurposed products** (such as corks or old wine bottles).

Paint nights

Paint nights are events where participants pay an entrance fee and are provided with a canvas and paints. An art teacher instructs attendees on how to paint a certain image. In the US they are popular with young adults, as they are usually held at bars or restaurants and visitors can enjoy a glass of wine or a beer while they paint. The tasting room can offer something similar, charging an entrance fee and allowing guests to buy wine by the glass to enjoy while they paint. This presents an opportunity for mentally challenged people to **either be working at the event or participating**. This link gives an overall idea of the concept: <https://www.paintingwithatwist.com/>

Live music

During good weather the tasting room will feature **live music outside on the terrace**. Preferably this would be local artists, or even students, performing in order to highlight **local talent**. There could also be live performances of other types of art, such as comedians or local theater groups.

3. Products to sell

As outlined in the action plan proposal, the tasting room will also function as a shop selling wines and other local products. Products will include the following:

- + **Wine:** Soalheiro wines with an emphasis on *Germinar* wines
- + **Herbal teas:** Soalheiro’s line of herbal teas
- + **Local products:** Food products from local producers such as **Quinta de Folga, Prados de Melgaço**, and **Mel do Zé**. This also presents the opportunity for **collaboration with local producers** to develop a product that will only be sold in the tasting room (for example, a special cheese with herbs from Soalheiro’s herbal tea project).
- + **Special art pieces:** To further benefit the mentally challenged community, the project can sell items made by this community in the tasting room. As discussed in the special events section, these could be art pieces created during special workshops. This would be an opportunity to further **valorize the work** of this community.

4. Staffing

One of the most important goals of the *Project Germinar* tasting room is to **integrate** mentally challenged members of the local community, aiding in their personal and professional development and **valorizing their hard work**. This, however, is not a simple task and needs to be handled with care.

As outlined in the action plan proposal, the process of staffing will be a collaboration with António Matos. He will first determine how many possible staff members he knows that will be suitable for the project and what their capabilities are. Perhaps the project will begin with just a few mentally handicapped team members and grow with time as the project's network spreads and the day-to-day operations become more fluid. The project can also include other vulnerable members of the community who could benefit from integration and responsibility, not being exclusive to those with mental handicaps.

Depending on their level of skills, staff members with disabilities can perform tasks such as:

- **Greeting and engaging with guests**
- **Cleaning tables and tasting spaces**
- **Handling transactions with the cash register**
- **Preparing food and beverage items**
- **Serving guests**
- **Joining or leading tours of the vineyards and surrounding property**
- **Preparing products** (such as gift boxes, picnic baskets, etc)
- **Helping support special events** (set up, clean up, attending guests, etc)

Once their skills are discussed with António this list can certainly be expanded.

With staffing and assignment of tasks, the project needs to take care that the mentally handicapped staff are included and integrated into the team. Staffing and operations **must avoid any situation that presents the image that they are “less” than other staff**. This means ensuring that the handicapped staff are incorporated as core members of the team and not treated only as “support”. As seen in the Bitty & Beau's benchmark, the successful integration of handicapped employees onto the staff will contribute to a **warm and inviting environment** in the tasting room that will be an experience in itself.

António will serve as technical lead for the project and ensure that handicapped staff members are well trained and given tasks where they will be most successful. As discussed in the action plan proposal, the tasting room will require more staff with specialized skills related to both social work and tourism. These staff will include **wine tourism staff, social workers, and interns of social work or tourism from local universities**. Regardless of background, all staff will need be trained in sensitivity, how to work with this special community, and wine tourism and service skills (as discussed in the action plan proposal).

5. Regional Strategy

The regional strategy refers to how this tasting room will factor into the overall tourism offer of the region.

When considering how this project will fit there are four main factors to consider: the **current regional offer**, **Soalheiro's brand image**, the **placement of Casa Vigia**, and the **inclusive nature of the project**.

Current regional offer

The current regional offer must take into account two parts: the offer in **Valença** and the offer in **Monção and Melgaço**. It is important to highlight both, as Soalheiro's brand is associated with Monção and Melgaço, but the tasting room will be located in Valença, which is about 30 km from Soalheiro.

For Monção and Melgaço, the regional tourism includes agrotourism, wine tourism, outdoor activities, and local gastronomy. It is arguably one of the most famous subregions of Vinho Verde (with only the Lima subregion holding equal levels of fame), and for this reason visits to the wineries are popular here. Valença has a similar offer but, with its location outside of the Monção and Melgaço region, wine tourism does not have the same presence. Valença, on the other hand, is home to the *Fortaleza de Valença*, an old stone fortress that encloses an old town center full of shops and restaurants. With its proximity to Spain, it is also a popular stopping point for pilgrims on the *Camino de Santiago*, as well as Spaniards who come for shopping.

Soalheiro's brand image

Soalheiro is arguably one of the most famous, if not the most famous winery from Monção and Melgaço. In Portugal it shares fame with Quinta de Melgaço and Anselmo Mendes Vinhos, but internationally it is certainly the most recognized winery from this subregion. With that being said, for Portuguese nationals and international arrivals alike, it is a **driving factor to visit the region**.

Additionally, Soalheiro has a strong reputation of being an **innovative leader** focused on using innovation to improve the sustainability of its surrounding region. It has garnered a lot of respect for its innovative efforts, both at the local level as well as the national one (demonstrated in a visit from the President of the Republic).

Placement of Casa Vigia

The placement of *Casa Vigia* is very important, as it is located on the national road (N101) that connects Valença to Melgaço. This offers the ability to attract motorists passing on their way to Melgaço, or on their way out of Melgaço (to Porto, or Ponte de Lima, for example). It is also located on the *Ecopista do Minho*, an award-winning greenway popular with cyclists and those who like the outdoors.

Inclusivity

The *Project Germinar* tasting room aims to be **inclusive** in all aspects. From its staff, to the products it sells, it will be a space that **welcomes and celebrates** the region's different traditions.

Taking these factors into account, the strategy for the tasting room will be to **add something new** to the current tourism offer. In Valença there is practically no wine tourism, and even in Monção and Melgaço, none of the wine tourism offers feature a social initiative aspect. Following Soalheiro's already existing reputation for innovation, this project will be a step towards **diversifying what the region has to offer**, but in a way that is beneficial and sustainable to the local people.

Taking into account Soalheiro's popularity as a reason to visit the region, coupled with the prime location of *Casa Vigia*, the tasting room will attract **a variety of tourist markets**. Not only will it attract visitors who want to come taste Soalheiro's wines, but it will also invite guests who are passing by on the national road or the *Ecopista*. Located in Valença, this means it can attract guests who are not familiar with the brand, or who were not visiting for wine tasting. Perhaps they had come to Valença for other reasons but, intrigued by the space, they stop in to check it out and experience more of what the region has to offer.

With its inclusive nature, this space will showcase a variety of local producers. This will transform the tasting room into a kind of "hub" or centralized space for **communicating the region**. Taking into account the previously mentioned variety of visitors it can attract, this means that the tasting room will expose different markets to regional products they perhaps would not have encountered before. It will, of course, also be a hub for the local community to utilize, not just tourists. In this sense, even locals will be exposed to producers from the region that they perhaps were not familiar with before.

With time, the proposal is that the tasting room will be a successful **integration project, tourism space, and promoter of regional culture and products**. Though it may start small, the goal is for the network to spread and include any local actors or producers who want to be involved. With its anticipated success, it can also be a driver for other wineries or tourism providers in the region to develop inclusive, socially minded projects. It will benefit the local community in various ways. The first is, of course, through its integration and inclusivity initiatives. It can also benefit the region by communicating its culture and by driving tourists to the area, which will provide economic advantages.

In line with Soalheiro's other initiatives, this tasting space will be an **innovative** contribution to the region's offer that will **benefit local people as much as possible** in various ways.

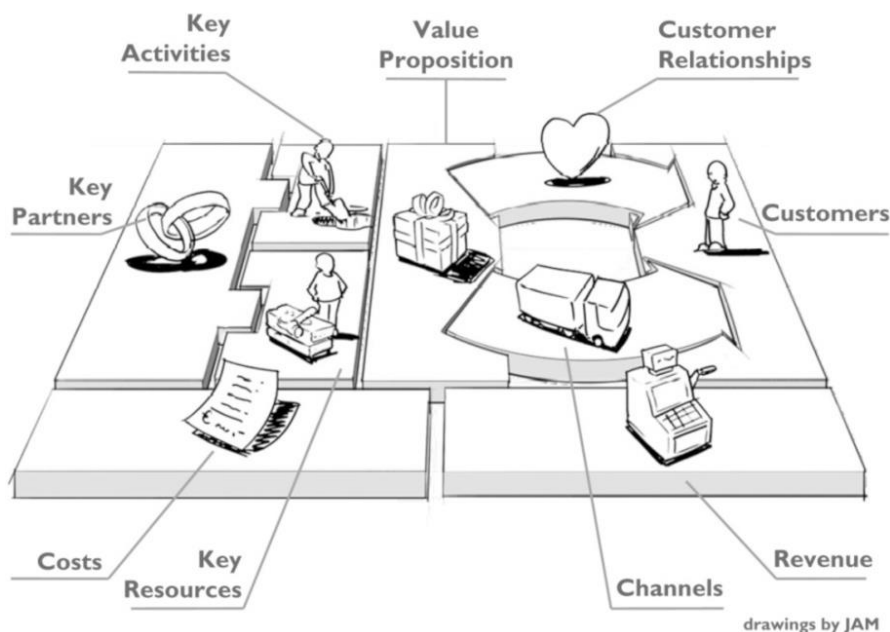
Annex 8. Business Model Proposal

Project Germinar Tasting Room Business Model Proposal

Introduction

A business model is an important tool to analyze how an enterprise or project creates value for its stakeholders. In the case of social enterprises, such as the *Project Germinar* tasting room, the focus is on **social value**, rather than economic value, as the project's main objective is to **benefit members of the local community**, rather than make a profit.

The proposal for the *Project Germinar* business model is based on the building blocks presented in Daniele and Quezada's (2017) "Business Models of Social Entrepreneurship in Tourism." In this work the authors establish and define the important parts of business models for socially driven projects, based on previous models by Osterwalder and Pigneur (2010) and Sommerrock (2010). The following diagram from Osterwalder and Pigneur shows how the different building blocks work together to form the operations of the larger social enterprise, and subsequently capture and create value:



Business model canvas. Source: Osterwalder & Pigneur (2010), sourced from Daniele & Quezada (2017)

Daniele and Quezada take these 9 building blocks and complement them with 2 more from Sommerrock. This business model proposal for *Project Germinar* therefore focuses on their 11 building blocks and how they relate to the project's creation of social value. The blocks are **value proposition**, **key activities**, **key partners** (value networks), **key resources** (resource strategy), **customer segments** (market definition), **customer relationships**, **distribution channels**, **cost structure**, **revenue streams** (revenue model), **legal structure**, and **growth**.

Project Summary

This business model focuses on the proposed business structure and value creation strategy for a tasting room at *Casa Vigia* as part of Soalheiro's *Project Germinar* **social initiative**. *Project Germinar* began when António Matos, a social worker and vineyard owner approached Soalheiro with the idea to integrate mentally challenged individuals into the vineyard work. This quickly turned into a full **integration project**, contributing to the professional development of this group of people and bringing awareness to equal opportunities. As an extension of the project's already existing integration strategy, the new tasting room will employ local mentally challenged individuals, while also serving as a **community space that promotes local culture**. The tasting room will serve Soalheiro wines and other local products while featuring a tourism offer that communicates the project's values and the region's traditions. The ultimate goal is for the tasting room to bring economic self-sustainability to *Project Germinar*, confirming that this is not a project based on charity, but rather on integration and valorization of the work of these individuals.

Though the tasting room will operate under Soalheiro, to encourage the project's self-sustainability this business model proposes that it maintains its own independent business operations. For the initial investment and rehabilitation of *Casa Vigia*, the project will seek donations from local partners and an investment from Soalheiro. For operations of the tasting room, it should function as a normal business. This means purchasing products to be sold from producers (including Soalheiro wines), and then using revenue from sales of products and tourism experiences to fund the project's daily operations. Though this may not be possible initially this is the goal, and this business model proposal was created with this goal in mind. For a complete understanding of this proposal, please also refer to the general concept, action plan, and tourism strategy proposals as well.

The Business Model

i.

Value Proposition

The **value proposition** makes the core of a social enterprise's strategy by defining what value the project creates for those involved. It describes both **how stakeholders benefit from the project** and how their needs will be satisfied. With social enterprises, this value refers mostly to **social value**, not necessarily economic value. In the case of tourism-related social products there are two groups of stakeholders: the **beneficiaries of the social aspect** (from the host population), as well as **tourists who visit**.

In the case of *Project Germinar's* tasting room, it is first important to identify the two main groups of stakeholders following Daniele and Quezada's model: **the local mentally challenged people involved in the project** and **the visitors to the tasting room**. In addition

to these two main groups, the project also involves the **local producers and businesses of the area that contribute to the efforts** (including Soalheiro), **local students**, and the **local community**.

To understand the value proposition for this project, it is best to divide it into **social value**, **economic value**, and **brand value**. Though the emphasis truly is on **social value**, it is important to recognize the other two as well.

{ Social value }

The most evident and important social value of this project benefits the mentally handicapped people who are associated with *Project Germinar*. For this population there are several value propositions. The first is through their employment and **integration** into the project. By working in the tasting room (and in the vineyards) they are gaining **personal and professional skills** and the opportunity to integrate into society that they may not have previously had. Also, by receiving a wage for their work, they are not only benefitting financially, but also earning a **sense of independence** and **responsibility** to be able to manage their own finances and make purchases for their own benefit.

Interactions between visitors in the tasting room and the mentally disadvantaged staff will create **shared value** for both sides. Both groups (the visitors and the staff) will benefit from a stronger sense of integration and more societal acceptance of people with disabilities. Projects where people with disabilities are given the same employment opportunities as the general population encourage **integration** and work to **remove the stigma** that people with disabilities are less capable, ultimately benefitting society.

Visitors will also benefit from social value creation. They will make positive connections with these special people and get to see first-hand who their patronage benefits. Additionally, visitors' contributions to this social project will likely leave them with positive feelings, knowing that their money is benefiting a good cause. They will be able to enjoy local products and form a lasting and **authentic connection** with the region and its people.

As the space focuses on local products and traditions, the local community will benefit from the **recognition of their culture and region**. Particularly, as *Quinta de Germinar* is part of the *Club of Producers*, the tasting room right on the vineyard site celebrates and valorizes the local grape growing culture. By serving local products, producers will have their efforts and culture recognized and appreciated.

As a community space developed with local input, local people will have a place they **can feel proud of**. Additionally, interns will benefit from practical experience in a unique working environment and the ability to **contribute to a special project** in their region.

{ Economic value }

While the main objective of this project is the creation of social value, it is important to address economic value creation as well. In this case, economic value refers to

the value visitors will place on products offered, but also how the tasting room will generate revenue to operate and be valuable for *Project Germinar*.

For the visitors to the shop, it will be important that the products offered have a high economic value. This value will be created by offering goods (both products and tourism experiences) of top quality. Visitors will enjoy the **pure pleasure** of a glass of wine in a beautiful space but can also purchase high caliber local products that perhaps they cannot get outside of the region. Economic value will therefore come from **quality** and **authenticity**, but also from the **added value of benefiting a social cause**. Market trends suggest that consumers place more value on products they know will benefit causes important to them. The overall experience of visiting this unique shop, as seen in the Bitty & Beau's benchmark, will also contribute to the economic value of the products offered.

The goal is for *Project Germinar* to be **economically sustainable**. Initial investments will be made (from Soalheiro and other local businesses) to get the project off the ground. To work towards self-sufficiency, the tasting room will generate revenue in the form of tourist activities and selling products in the shop. This will be used to pay employees, cover business costs, and purchase the products to be sold. This self-sufficiency in itself is also a type of social value, as it makes it so that the project is based not on charity, but rather on **valorizing authentic and quality work efforts**. Further, any extra profits can be used for special programs or events for the mentally handicapped community.

Additionally, local producers selling their products in the store will benefit from the economic value generated from sales of their products. This includes Soalheiro, who will benefit from the sale of their wines in the shop.

{ Brand value }

In relation to economic value, the involvement of Soalheiro and other local businesses will also generate **positive brand value**. As the market is demanding more and more social awareness and responsibility from producers, involvement in such a project will reflect positively on the brand image of associated businesses. This adds value to their investments in the project.

ii. Key Activities

The **key activities** are the repeated actions the business performs in order to deliver value (the value chain). In this model, this refers to the activities necessary to deliver the **social value** that is highlighted in the value propositions. While traditional business models focus on value creation at the end of the value chain, in the case of social enterprises value can also be created along the value chain.

{ Work in the vineyard }

Without António's initiative to incorporate adults with mental handicaps in his vineyard work, *Project Germinar* would not exist. The first key activity is therefore the **employment of mentally disadvantaged people in the vineyards** that produce *Germinar*. This project creates value in this step, as it integrates a special group of

people, **aiding in their personal and professional development**. Additionally, sourcing these grapes from a local small vineyard owner works to maintain the wine-growing culture of the region, adding value in the form of **cultural sustainability**.

{ Making of the wine }

The wine made from this special plot **gives value to the labor of these individuals**, showing that their hard work can lead to a tangible product of high quality, valorizing their work effort. The making of the wine is crucial to the development of the tasting room because without wine to taste, there is no tasting room. Additionally, *Germinar* wines sold outside of the tasting room contribute a portion of sales into the project.

{ Procurement of local products }

Contributing to the local culture and community as much as possible, foods and products sold in the tasting room will be **sourced from local producers**. This will benefit the producers economically, but also culturally, as it **recognizes their business efforts and heritage**. The purchasing of wines from Soalheiro will also be a part of the value chain. Following a traditional business model, the products and wines will be purchased from their producers (rather than donated to the project) and sold at the shop. This will contribute to the project's **independence** and **self-sustainability**, making it not about charity. Any products needed for the development of the physical space will be sourced from local producers (be it by donation or by purchase).

{ Operation of the tasting room }

The tasting room will feature tourism products that will **highlight** and **communicate the uniqueness** of *Project Germinar*, as well as the region. The revenue from tourism products and wine sales in the shop will go back into the project, contributing to its **self-sustainability**. It will also employ mentally handicapped individuals, giving them **meaningful work opportunities** and **important social development**. The tasting room will offer products for tourists who can enjoy the experience while also appreciating that their **purchase has an important social benefit**. By encouraging interactions between visitors and the local disabled community, the project works towards more **integration** and **acceptance**.

{ Marketing }

The marketing of the tasting room space will teach people about its mission, encouraging visits to the space. Successful communication will also **increase brand value** for Soalheiro and other associated organizations, as consumers lean towards products that contribute to social causes. Sales of *Germinar* wines through other sites will generate revenue for the project while also informing people of its mission. Any marketing or communication that brings people to the tasting room will **add to the social value of the project**.



iii. Key Partners (Value Networks)

The **key partners** are those partnerships that contribute to the value proposition of the project and allow for the operation of the business. This network is very

important for social enterprises, as it allows for a **wider network of support** and **availability of resources** and can help to **expand the reach of the project**. Consequently, social value is also created for many of the partners by their inclusion in the project.

{ António Matos and the APPACDM }

Without António and the APPACDM this project wouldn't exist. António is the owner of the vineyard plots where the grapes for *Germinar* are sourced, but he is also the social worker who works with the mentally handicapped individuals and ensures their safety and success in the vineyard (and now the tasting room). He is educated in how to acknowledge and enhance the skills of every individual and is **imperative to the success of this program**. For this project he will be very important for **bringing the connections** to the mentally challenged people and the APPACDM, as well as being the technical lead in the tasting room, adapting the work to the employees' skills to help make the work run as smoothly as possible.

- + What he will provide: **Knowledge, skills, employees, and networking.**

{ Public offices }

The project should partner with local public offices (such as town halls and tourism boards) for the promotion of the tasting room and possible funding. These offices can provide connections to other entities that want to be involved such as businesses, producers, or even other social organizations. Public tourism offices can create synergy with other tourism offers in the region for more visibility. There may even be the opportunity in the future to apply for grants through the government (be it at the local, country, or EU level). Additionally, *Casa Vigia* is a public property that was granted to Soalheiro by *IP Património*. Specific examples of possible public partners are presented in the action plan proposal.

- + What they will provide: **Marketing, networking, the property, and possibly funding.**

{ Local businesses }

The project should appeal to local businesses to donate funds or resources such as furniture, materials, and machinery for construction. Businesses can provide a link to other entities that may want to be involved, **opening doors** for the project that may have been previously closed. Additionally, companies will communicate their participation in the tasting room through their own channels, providing free marketing for the project. Soalheiro should start with companies they already partner with, then branch out to other businesses. Examples of companies are in the action plan proposal.

- + What they will provide: **materials, funding, marketing, and networking.**

{ Local producers }

Local products will be sold in the tasting room, **promoting local culture** while also spreading **positive social and economic benefits** to the community. If producers communicate that their products are sold in the shop, it will provide marketing and drive visitors to the tasting room. They can also connect us to other local producers or businesses that want to be involved. Local producers may choose to participate in volunteer days or host special community events at the tasting room. As indicated in the wine tourism strategy proposal, there is the possibility to collaborate with producers to create a special product exclusive to the tasting room, which will be an **added value**.

- + What they will provide: **products, marketing, culture, networking,** and **volunteer support**.

{ Local universities }

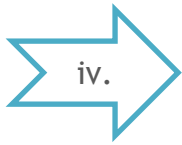
The strategy is to involve local university students in various execution stages of the project. This will include architecture and design students during the renovation of the space, and social work and tourism students to help during the operations of the tasting room. By keeping permanent positions for interns, it will **involve more of the local community** in the project, giving opportunities for students to gain practical experience and be part of a unique social project. It can contribute to the **prevention of a loss of talent** in the area by encouraging educated youth to stay in their communities instead of moving to cities for work. Partnerships with local universities will also provide access to **new research and technologies**. Examples of possible university partners are presented in the action plan proposal.

- + What they will provide: **knowledge, skills,** and **labor**.

{ Local community }

As a space that is meant to benefit and serve the local community, there is **no greater partner than the community itself**. The community and region provide the culture and traditions that are meant to be celebrated in the space. This culture differentiates this region from other regions and brings value to the tourism offer. Members of the community can provide **valuable insight** that can inform the project, such as partners that want to be involved, means of funding, local producers who can sell their products, and local history and traditions that should be acknowledged in the tourism offer. Additionally, the community can connect the project to other vulnerable populations that can benefit from work integration. Members of the local community will be volunteers on the volunteer days. They can host events in the space that will bring in revenue as well as social value. Finally, **word of mouth** in the community will also act as its own marketing, and it is important that the project has a good relationship with the community in order to be successful.

- + What it will provide: **culture, history, networking, knowledge, marketing,** and **volunteer support**.



Key Resources (Resource Strategy)

Social enterprises **need resources to fulfill their value proposition**. To be successful, these enterprises should use innovative and sustainable strategies to acquire the needed resources. Acquisition of resources also presents the opportunity for these types of projects to expand their reach, by using a strategy that can expand their network and benefit stakeholders in the process. Following Daniele and Quezada's (2017) definition, the three main categories of resources are: **economic capital**, **human capital**, and **social capital**.

{ Economic capital }

Soalheiro will provide some of the financial capital needed to start the project, but the ultimate goal is for the tasting room to be **self-sustaining**. Initial resources for the renovation of the space will also come from donations from local businesses and public offices, both financially and for materials (physical materials and machinery). *Casa Vigia* does not need to be purchased, but rather comes from an agreement with the public office *IP Património*.

The economic sustainability of the project will come through the sale of products (wine, tourism, and local products) in the tasting room. The strategy is to operate as a normal business, buying products (wine and other local products) from their producers and selling them in the shop for a profit, which will fund the daily operations. Additionally, a portion of the sales of *Germinar* wines sold outside of the tasting room are donated back into the project. The project may not be completely self-sufficient at first and may require extra investment from Soalheiro, but the goal is to become **independent**. This will ultimately ensure that the enterprise is not focused on charity, but rather on integration and the **validation of the hard work** of the mentally challenged community.

In the future, the project should also look to grants (at the local, country, or EU level) for additional funding.

{ Human capital }

The organization and development of the tasting room will be handled by employees at Soalheiro, in partnership with António Matos. Staffing the tasting room will include local mentally challenged people, with the support of António, who will be contacted through the **partnership** with the APPACDM. Staff will also include wine tourism and social work professionals hired specifically for the project. There will be permanent internship positions for local students of social work and tourism as well, so they can bring their knowledge while also gaining practical experience in a unique project.

For the renovation and design of the space the project will enlist the help of local architecture and design students, either as interns or as part of a school project. For activities involving construction and design, the strategy is to have "**volunteer days**" where members of the local community, staff at Soalheiro, mentally challenged individuals, and anyone else who wants to help will help complete simple projects to help rehabilitate the space. This will give the local community more pride in the

project, as it was something they **helped create with their own hands**. The project will pay professionals for more intricate or delicate jobs.

Staffing in this way aims to **create more social value**, integrating mentally challenged individuals in every way possible, offering practical experience to local youth, and also **empowering people** to give back to a cause they believe in.

{ Social capital }

Daniele and Quezada (2017) explain that social capital is a sense of ‘local embeddedness.’ It refers to the **network** and **connections** the social enterprise has that help it operate successfully.

In the case of *Project Germinar*, social capital will involve developing the partnerships previously mentioned in the **Key Partners** section of this proposal. This includes connections with public offices, local businesses, local universities, and the community as a whole. Additionally, António is a very important part of social capital, as he is the connection to the APPACDM and the vulnerable community members. His skills will be needed to operate the tasting room successfully, and he also has access to other resources that can be beneficial to the project.

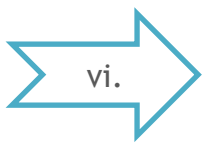
To develop the other partnerships mentioned, Soalheiro must begin with the partnerships they already have, such as Tintex or Amorim. These partners can connect the project to other partners, opening a network of doors that can provide access to valuable resources. Additionally, as part of the communication plan Soalheiro must include a strategy to convey the values of the project to potential partners and encourage them to join the initiative.

v. Customer Segments (Market Definition)

The **customer segments** are the value beneficiaries of the enterprise. Daniele and Quezada (2017) highlight the idea of “primary” and “secondary” customer segments when it comes to tourism social enterprises. In this model, primary segments are those that are direct **beneficiaries of the social value creation**. Secondary segments are therefore the visitors to the tourism offer. Unlike traditional business models, in social enterprises the customer segments are not only reached at the end of the value chain. In fact, the primary segments are usually **integrated into the value chain**. The use of “customer” is delicate here, as often the primary segments are not paying customers, but rather members of the host community that benefit from the social aspect of the enterprise.

In this case, the most primary customer segment are the mentally challenged members of the local community that will benefit from the integration in this project. This can eventually expand to include any vulnerable members of the community who will benefit from employment and integration. Additionally, the local community and local students who participate in the project will also benefit from the social value created. Namely, this will be through the recognition of local culture and the opportunity for practical experience in the tasting room. Local producers can also be considered a customer segment, as they also benefit from having their traditions and work recognized and purchased.

The secondary customer segment are the visitors to the tasting room. To start, the project will target the same market as current visitors to Soalheiro. This consists mostly of Portuguese nationals, though there are some visitors from other countries (mostly Spain, France, Germany, and the UK). They are typically middle class, millennials, interested in wine and gastronomy. Given the strategic location of *Casa Vigia*, the tasting room can also attract new markets of people passing by on the national road or the *Ecopista*. This can include locals or visitors to the area who were not necessarily interested in wine tasting but were curious about the tasting room. The expectation is that this tasting room will also attract visitors looking to support more social programs and patronize companies that have similar values.



Customer Relationships

The **customer relationships** in standard commercial business models refer to strategies to collect customer information and maintain relationships, adapting products to changing customer needs. In the case of social enterprises, the customer relationships are expanded to include the beneficiaries of the enterprise, wherever they fit on the value chain.

In this case the most important relationship will be with the mentally handicapped community. This project aims to create an environment where they can build personal and professional skills, validating their work and integrating them into the community. This will be done through careful training processes and work environment management (both for the abled and disabled staff members), where the skills of the disabled employees **will always be kept in mind and their limitations will be respected**. António will be the liaison in this endeavor, maintaining a strong connection with this community and ensuring safe and beneficial working conditions for all. By paying this community for their work, the project will **validate their efforts** and give them financial independence that can carry over to other parts of their lives. As their needs change, the project will adapt. This can include strategies such as incorporating new training programs or techniques or changing assigned tasks as needed.

Additionally, for the local community (including producers and students) that will also benefit from the project, the customer relationship will be maintained by always keeping an open line of communication. Community members can voice their concerns or ideas for the space, and adaptations will be made accordingly. They will be included in the rehabilitation of the project to make it something that they will be proud of and want to continue participating in. Producers will be paid accordingly for their products. Interns will be respected in the workplace and always given as many opportunities as possible for their personal and professional development. Further, *Casa Vigia* will also serve as a community space for locals to hold events and maintain a strong connection to the project.

The visitors to the tasting room are also important, and the utmost care will be put into providing top-quality experiences where guests and staff are all comfortable. Guests will really enjoy interacting with employees, and there will be **value created with every interaction**. Guests who have a good experience will return and tell their friends about the project. As this project is connected to Soalheiro, the same customer relationship strategies will be employed. The project will communicate with customers on social media and through an e-newsletter for pre and post visit communications. Newsletter subscribers will be segmented to direct special newsletters about the project to subscribers interested in social projects. Additionally, marketing and communication strategies will be added at Soalheiro

to communicate this project, associating it with the brand image, **creating brand value** for Soalheiro, and through this channel encouraging guests to visit the tasting room. By communicating with potential visitors and communicating value, it will encourage more guests to come to the tasting room, which will ultimately benefit the community of mentally handicapped people who are our first and most important “customer.”

vii. Distribution Channels

The **distribution channels** are how the enterprise connects with its customers. In the case of social tourism ventures, there are two distribution channels to be concerned with, those of primary and secondary customers. The primary “customers,” as explained in previous sections, are the beneficiaries of the social value. The secondary customers are those whose purchases create an income stream that supports the social enterprise.

In the case of *Project Germinar*, the primary “customers” are the mentally handicapped community of the region as well as other members of the local community who benefit from the project, such as local students or producers. The secondary customers are the visitors to the tasting room.

The distribution channel to the primary “customers” will be through António and the APPACDM. He will connect us to the individuals who will benefit from the project and oversee their integration. Additionally, he will help with the allocating of any extra profits/funding from the project (after the operations of the tasting room are covered) that can be used to provide extra activities or benefits for this community. Further, the connection to other members of the community will be through existing partnerships or new networks, as highlighted in the **Key Partners** section. Through these networks Soalheiro can connect to community members and local producers who want to be involved in the project. Through connections with local universities, Soalheiro can reach local students who will benefit from internships.

The distribution channel to the secondary customers will be the standard distribution channels already being used by Soalheiro for its wine tourism offer. Generally, people book wine tourism offers ahead of time through the Soalheiro website. They are made aware of these offers mostly through Soalheiro’s social media, e-newsletter, or website. Drop-ins will be encouraged as well. There is no plan to use any third-party booking systems. As noted in the **Key Partners** section, Soalheiro can partner with local tourism offices for communication about the tasting room, and also to create synergy with other tourism offers in the area.

Additionally, communications from other partners (other businesses, local governments) will spread the word about this project and encourage visits. In the future, the project can consider **partnering with responsible/sustainable tourism operators** to market this operation and increase visitors.



viii. **Cost Structure**

The **cost structure** takes into account all of the costs incurred to run this project (both fixed and variable). Fixed costs are the business expenses that do not vary with the volume of business, while variable costs change according to business volume.

In this case the fixed costs will be any of the costs associated with the building (rent, utilities) and the salaries of the employees. The initial costs to restore the building, decorate the inside, construct/buy furniture, and purchase supplies (wine glasses, etc), will also be fixed, one-time costs. Depending on the amount of donations received, Soalheiro will have to contribute some fixed, one-time investments for the initial restoration of the space and start of the business.

Variable costs will be the cost of the wine and any local products that would be sold in the tasting room, as the amount needed for purchase will be based on volume.



ix. **Revenue Streams, Revenue Model**

Revenue streams are how the company makes income off its value offered.

In the case of the *Project Germinar* tasting room, the revenue will be from sales of tourism products, local products, and wine. Additionally, the proposal is that local companies will donate to the cause. Perhaps in the future the project can also seek out grant funds.

Additionally, a portion of the sales of the *Germinar* wines that are sold outside of the tasting room are donated back into the project.



x. **Legal Structure**

Legal structure refers to the legal recognition of the company. In simple terms, is the entity for profit or non-profit.

As the tasting room will fall under Soalheiro, it will be operated as a for-profit entity for the time being. It is not determined yet if it will separate in the future and be its own non-profit entity.



Growth refers to how the project plans to expand, both from a business point of view but also expanding its social impact.

The tasting room already represents a **massive growth** for *Project Germinar*, as it was originally just the wine and vineyard integration. There are no plans to franchise, and the main growth strategy will just be successful sales in the tasting room. **For now..**

Annex 9. Photo of Germinar Bottle



Source: The Solent Cellar (2021) (<https://www.thesolentcellar.co.uk/shop/white/soalheiro-germinar-colheita-selecionada-2019-vinho-verde/>)

Annex 10. Proposal Feedback Survey

1. Em uma escala de 1-10 (sendo 1 o mais baixo), qual o grau de "implementabilidade" da proposta?

Em outras palavras, até que ponto as propostas são viáveis?

Sinta-se à vontade para adicionar comentários.

1. On a scale of 1-10 (with 1 being the lowest), what do you think is the degree of "implementability" of the proposal? In other words, how doable do you think these proposals are? Feel free to add comments.

2. Quais as partes da proposta podem ser consideradas as mais realistas e factíveis?

2. Which parts of the proposal do you think are most realistic and doable?

3. Quais as partes da proposta podem ser consideradas as mais difíceis ou irrealistas de serem implementadas?

3. Which parts of the proposals do you think are the most difficult or unrealistic to implement?

4. Em uma escala de 1 a 10 (sendo 1 o mais baixo), qual o nível de qualidade em geral das propostas?

4. On a scale of 1-10, what do you think the overall quality of the proposals were?

5. Algum outro feedback ou comentário adicional?

5. Any other feedback or comments?