



**2024**

**IL CAPITALE CULTURALE**  
*Studies on the Value of Cultural Heritage*

**eum**

*Rivista fondata da Massimo Montella*



## Il capitale culturale

*Studies on the Value of Cultural Heritage*

n. 29, 2024

ISSN 2039-2362 (online)

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Registrazione al Roc n. 735551 del 14/12/2010

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# Enhancing Local Cultural Heritage and Milieu to Promote the Wine Industry and Tourism. Light and Shade from the Climats du Vignoble de Bourgogne

Annamaria Romagnoli\*, Mara Cerquetti\*\*, Tonino Pencarelli\*\*\*

## *Abstract*

In the wine industry, the relationship between a company, its milieu and local cultural heritage is crucial for achieving a sustainable competitive advantage. Two of the key ingredients for the success of a wine destination are terroir – a combination of factors, including soil, climate, and sunlight, which give wine grapes their distinctive character – and landscape. The present research aims to make a contribution to the debate on this matter by examining the relationship between the wine sector, milieu and cultural heritage, to understand the role it plays in wine and tourism marketing, a field that scholars have not yet adequately explored. The paper discusses the case study of the Burgundy region, where the Climats du Vignoble de Bourgogne were inscribed on the UNESCO World Heritage

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List in 2015. Thanks to a 6-month stay in the Dijon area and interviews with key actors, theoretical and managerial implications emerged regarding the relationship between wine, cultural heritage and milieu. The results show that the enhancement of this relationship could create value, not only for the wine sector (strengthening brand image), but also for cultural heritage (by improving its protection and enhancement) and for the territory (mainly through tourism development).

Nel settore vitivinicolo, il rapporto tra un'azienda, il *milieu* e il patrimonio culturale locale è cruciale per ottenere un vantaggio competitivo sostenibile. Tra gli ingredienti chiave per il successo di una destinazione vitivinicola, vale la pena menzionare il *terroir*, una combinazione di fattori – tra cui suolo, clima e luce solare – che conferisce alle uve il loro carattere distintivo, e il paesaggio. Con l'intento di fornire un contributo al dibattito sul tema, la presente ricerca esamina il rapporto tra il settore vitivinicolo, il *milieu* e il patrimonio culturale per comprenderne il ruolo nel marketing del vino e del turismo, un campo di indagine che gli studiosi non hanno ancora adeguatamente esplorato. L'articolo discute il caso studio della Borgogna, dove i Climats du Vignoble de Bourgogne sono stati iscritti nella Lista del Patrimonio Mondiale dell'UNESCO nel 2015. Grazie ad un soggiorno di 6 mesi nell'area di Digione e alle interviste con alcuni attori chiave, vengono fornite implicazioni teoriche e manageriali sul rapporto tra vino, patrimonio culturale e *milieu*. I risultati mostrano che la valorizzazione di questo rapporto potrebbe creare valore non solo per il settore vitivinicolo (rafforzando l'immagine del marchio), ma anche per il patrimonio culturale (migliorandone la tutela e la valorizzazione) e per il territorio (principalmente attraverso lo sviluppo turistico).

## 1. Introduction

Wine is not only an oenological product, it is also an identity and symbolic one that is closely tied to culture and place. As such, it draws inspiration from the land, history, and traditions of a territory<sup>1</sup>. Its production involves technical knowledge, skills, and cultural factors that are passed down through generations<sup>2</sup>.

The importance of the place of production in the wine sector is clear. Place of production has, for several reasons, a primary role in the wine industry, as highlighted by the notion of *terroir*. This concept was first developed in France to define the correlation between the specific physical characteristics of a place (e.g., the soil and slope of a vineyard, the grape blend, and the local climate) and the character of its final products. This relationship is often mediated by human experience built up over centuries, including agricultural know-how, established viticultural processes and local traditions<sup>3</sup>. Thus, *terroir* is a key ingredient for determining the quality of a wine.

<sup>1</sup> Sasso, Solima 2018.

<sup>2</sup> *Ibidem*.

<sup>3</sup> Fourcade 2012.

In France, the practice of identifying wine by its geographical origins is a long established one<sup>4</sup>. Since at least the Middle Ages, producers from high-prestige French regions, whose wines are priced higher than others, have struggled to protect their commercial advantage against large volumes of wines from low-prestige regions<sup>5</sup>. Regularising and using local names in commercial practices is more recent and probably corresponds to a new form of self-protection in an increasingly open economy. Labbé pinpoints the start of this practice as the 1940s, when the generic name Beaune – one of the main wine towns in Burgundy – was replaced with the names of individual villages in sales<sup>6</sup>.

The Burgundy region is an interesting case study. The safeguard and enhancement of *terroir* in this region are provided by the appellations of controlled origin (AOC). Indeed, place name has been formally recognised as the main element for the wine labelling process, and *terroir* has acquired a legal definition and a more positive connotation<sup>7</sup>. The AOC system in Burgundy sets out a strict geographical definition of high-quality wine production areas, down to very small portions of the region's territory. It strictly regulates the grape varieties, winegrowing techniques (e.g., vine spacing, pruning methods) and the winemaking processes that can be used within these areas. In order to be recognised as an AOC, localities must go through a long and laborious certification process conducted by a national committee. Finally, the institutionalisation of *terroir* as the most important indicator of wine has evolved alongside this system and has set in motion an elite-driven folk and traditionalist revival throughout France, with Burgundy leading the way in the 1930s, through the creation of gastronomic societies and Bacchanalian fraternities<sup>8</sup>. Gade describes this process as a kind of “heritisation” of wine<sup>9</sup>.

Another concept worthy of mention in relation to the importance of place in the wine industry is landscape, which represents the history and heritage of wine regions and is an essential motivation for wine tourism<sup>10</sup>. Indeed, landscape is considered one of the main incentives for tourists to visit wine areas<sup>11</sup>. Studies have shown that non-wine-related features, such as atmosphere and landscape, have become crucial attributes of the experience<sup>12</sup>. Indeed, a wine landscape provides a deep immersion in the rural environment, culture, and local traditions, especially through gastronomy and architectural heritage<sup>13</sup>.

<sup>4</sup> Loubère 1990.

<sup>5</sup> Hinnewinkel 2004; Colman 2008.

<sup>6</sup> Labbé 2011.

<sup>7</sup> Fourcade 2012.

<sup>8</sup> Laferté 2006, 2012; Whalen 2007.

<sup>9</sup> Gade 2004.

<sup>10</sup> Cohen, Ben-Nun 2009.

<sup>11</sup> Senkiv *et al.* 2022.

<sup>12</sup> Rachão *et al.* 2020.

<sup>13</sup> Back *et al.* 2021; Esau, Senese 2022; Yadav, Dixit 2023.

Landscape and heritage are thus reasons why tourists are attracted to wineries<sup>14</sup>, whereas the sense of place that is inherent to wine landscapes and regional identities is increasingly being used as a distinctive selling proposition<sup>15</sup>. Thus, wine tourism plays a significant role in strengthening the link between local wine traditions and territory. It offers visitors an opportunity to immerse themselves in the culture and heritage of a community<sup>16</sup>. This relationship not only creates economic value, but also contributes to the preservation of local cultural heritage and the strengthening of a community's identity<sup>17</sup>.

Hence, we can consider the relationship between the wine sector and place of production as central, especially milieu and cultural heritage. In France, this link is particularly valuable. With a history dating back thousands of years, wine is indivisible from France's culture, heritage, *terroir* and economy<sup>18</sup>. This is especially true in Burgundy, where «place matters»<sup>19</sup> and *terroir* is a key element of the wine industry, both as a guarantee of quality and as a cultural aspect.

However, in terms of the research on heritage marketing, the scientific literature has mainly focused on the role of internal assets, specifically corporate heritage<sup>20</sup>. In analysing their contribution for marketing purposes, scholars have investigated the time factor, by studying historical companies and the omni-temporality of heritage<sup>21</sup>. The potential role of external assets, such as local cultural heritage and milieu, has still not been adequately explored. In view of this gap, this research seeks to answer the following questions:

RQ1: What role could local cultural heritage and milieu play in marketing strategies?

RQ2: What are the positive and negative implications for wine and tourism marketing?

Thus, the research aims to study the relationship between the wine sector, milieu and cultural heritage, to understand the dynamics, the related light and shade, and the role it plays in wine marketing and tourism.

To answer our research questions, the case study methodology was adopted, focusing on the case of the Burgundy region. Several complementary data sources, such as desk analysis, observational surveys, visits to places of partic-

<sup>14</sup> Gómez *et al.* 2013.

<sup>15</sup> Harvey *et al.* 2014

<sup>16</sup> Carrasco *et al.* 2019.

<sup>17</sup> Reinales-Lara *et al.* 2023.

<sup>18</sup> Alonso Ugaglia *et al.* 2019.

<sup>19</sup> Demossier 2022, p. 119.

<sup>20</sup> Urde *et al.* 2007; Montemaggi, Severino 2007; Balmer 2011; Burghausen, Balmer 2014; Burghausen, Balmer 2015; Balmer 2017; Napolitano *et al.* 2018; Garofano *et al.* 2020; Riviezzo *et al.* 2021.

<sup>21</sup> Riviezzo *et al.* 2015; Napolitano *et al.* 2015; Pecot *et al.* 2019; Balmer, Burghausen 2019; Pecot, Merchant 2022; Burghausen 2023.

ular interest and semi-structured interviews with key actors, were used for the case analysis.

The paper is structured as follows. Section 2 discusses the complex concepts of cultural heritage and milieu, highlighting some common elements. The analysis also includes cultural landscapes in relation to the UNESCO World Heritage List (WHL). Section 3 introduces the research context: the *Climats du Vignoble de Bourgogne* (France). Section 4 presents the research methodology, while section 5 provides the results discussed in section 6. Finally, in section 7, conclusions are drawn, highlighting managerial and theoretical implications, research limits and further research.

## 2. Theoretical framework

### 2.1. Cultural heritage: from cultural property to resource

Cultural heritage is a slippery and ever-changing concept. Defining cultural heritage is not easy, because its features are continuously reshaped by the relationships people have with their environment. Indeed, as Schofield<sup>22</sup> argues, cultural heritage is «a matter of perception», thus not an intrinsic property of objects, but a construction, an invention. Therefore, cultural heritage, and consequently its role in and for society, are constantly evolving; they have changed over time and will change in the future.

Legal definitions allow us to understand such changes. Although incomplete and full of gaps, they recognise cultural societal changes when they are mature. They also provide a new framework for recognising and managing cultural heritage, thus triggering a continuous cycle<sup>23</sup>.

A brief look at some of the definitions provided by international conventions (drafted by UNESCO and Council of Europe) shows that the concept of cultural heritage has expanded to include a variety of assets (Fig. 1). In 1954, the *UNESCO Convention for the Protection of Cultural Property in the Event of Armed Conflict* (The Hague) introduced the term “cultural property” and extended the category of cultural objects worthy of protection, which included “historical monuments”, “works of art” and “works of science”. Later, the *Convention Concerning the Protection of the World Cultural and Natural Heritage* (Paris, 1972) legally recognised the close link between culture and nature for the first time. However, the Convention’s definitions of “cultural heritage” and “natural heritage” state that only what has “outstanding universal value” is worthy of protection. In 2000, the *Council of Europe Europe*

<sup>22</sup> Schofield 2016, p. 3.

<sup>23</sup> Cerquetti, Romagnoli 2022.

*an Landscape Convention* (Florence) introduced an integrated and transversal vision of the landscape and the role played by the population's perception in identifying the landscape. It extended the concept of landscape beyond excellence to include everyday and degraded landscapes. Only in 2003 did the *UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage* (Paris) extend the concept of "cultural heritage" to intangible heritage, considering it a living expression whose evolution should be safeguarded. Finally, the *Council of Europe Framework Convention on the Value of Cultural Heritage for Society* (Faro, 2005) defined cultural heritage as a «group of resources inherited from the past»<sup>24</sup>. This shifted the focus from «how and what to protect»<sup>25</sup> to «why and for whom to enhance»<sup>26</sup>, revolutionising the traditional approach to cultural heritage.

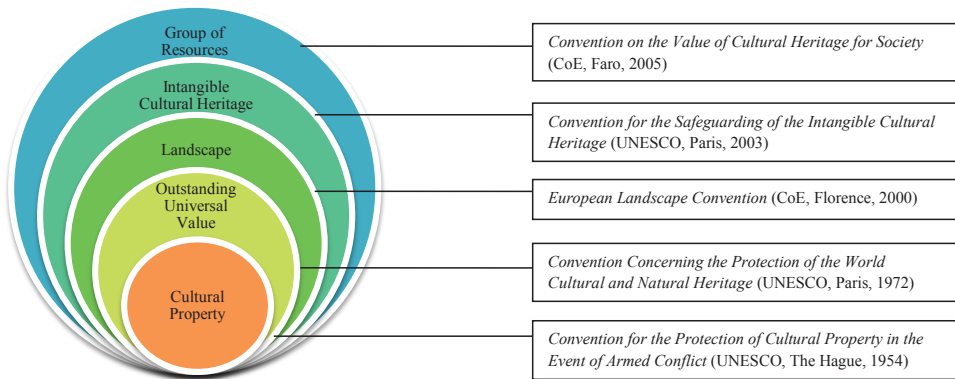


Fig. 1. Development of the concept of cultural heritage in the international legal framework (Source: own elaboration)

Thus, since the 1950s, the international legal framework has broadened the concept of cultural heritage and prompted a paradigm shift in its identification and management, involving *subjects* (from central authorities to heritage communities), *processes* (from top-down to bottom-up), *objects* (from excellence to everyday evidence of humanity and its environment), *values* (from intrinsic value to use value) and *objectives* (from preservation per se to sustainable use and development). In particular, the individual, alone or collectively, is placed at the centre of the cultural process, in a "Vitruvian-type" format<sup>27</sup>. The Faro

<sup>24</sup> *Council of Europe Framework Convention on the Value of Cultural Heritage for Society*, art. 2, letter a.

<sup>25</sup> Council of Europe 2005, p. 4.

<sup>26</sup> *Ibidem*.

<sup>27</sup> D'Alessandro 2015, p. 78.



Convention talks of going beyond the top-down approach to accommodate a bottom-up strategy, making people active participants in cultural life. In addition, the Faro Convention's approach goes beyond the erroneous dichotomy between protection and enhancement of cultural heritage<sup>28</sup>, and emphasises that enhancement can aid protection by attracting more resources for cultural heritage conservation and spreading awareness about the value of cultural heritage.

The paradigm shift in the value statement, namely from intrinsic value to use value, is paramount. On this matter, Montella recognises three types of value that can be obtained from cultural heritage: *presentation value*, *landscape value*, and *production value*<sup>29</sup>.

For the purposes of this paper, our focus is on *production value*, which refers to the market uses derived from cultural heritage and the profits of businesses operating in different sectors, such as restoration, publishing, tourism, construction, real estate, performing arts, etc. In the current context, cultural heritage is no longer a mere source of historical knowledge (embodying an intrinsic value), but also a resource capable of creating multi-stakeholder and multidimensional value. Considering this use value from a business perspective, cultural heritage, especially when layered over time in a specific context, can influence value creation and increase the value of products, particularly in the "Made in" industries<sup>30</sup>. In addition, cultural heritage plays a crucial role in external communication. As a group of rare, inimitable, valuable resources built up over centuries, closely linked to a series of local factors and difficult to reproduce in other contexts<sup>31</sup>, it is a powerful tool for communicating the identity of companies and territories<sup>32</sup>.

In a nutshell, local cultural heritage can be a factor of production<sup>33</sup> and become a resource for a company's competitive positioning in the glocal context. Indeed, consumption processes are currently characterised by a pressing need for authenticity as a cultural counterforce to the deterritorialisation that results from globalisation. In fact, in recent years, the roots of national competitive identities are increasingly being rediscovered<sup>34</sup>, especially in sectoral contexts where the management and reconfiguration of specific skills rooted in territories is a competitive advantage<sup>35</sup>.

<sup>28</sup> Petraroia 2010; Golinelli 2015; Saviano *et al.* 2018; Cerquetti *et al.* 2019.

<sup>29</sup> Montella 2009.

<sup>30</sup> Symbola, Unioncamere 2011; Golinelli 2012.

<sup>31</sup> Maggiore *et al.* 2016.

<sup>32</sup> Napolitano, Marino 2016.

<sup>33</sup> Macario, Santovito 2016.

<sup>34</sup> Anholt 2007; Blair *et al.* 2014.

<sup>35</sup> Boschma 2004.

## 2.2. *Milieu: a dynamic concept*

Milieu is an «ambiguous»<sup>36</sup> concept and, therefore, is not always easy to define. The term and the notion of milieu appeared in different scientific disciplines from the 18th century onwards and underwent various modifications in the 19th century<sup>37</sup>. Lamarck defined it as external to individuals and involving them, hence the French concept of *environnement*, which derives from the word *environ*, meaning the surrounding territory. The naturalist Étienne Geoffroy de Saint-Hilaire interpreted milieu as a “circumstance” and, under Lamarck’s influence, coined the term “milieu ambient”<sup>38</sup>. Since the mid-18th century, the French school of geography has defined the study of a place and its ways of life as a means of identifying relationships using various scales, connections and intersections that derive from the purely deterministic aspects of a milieu<sup>39</sup>. In this regard, the geographer Vidal de La Blache considered the French word “milieu” and the English word “environment” as synonymous<sup>40</sup>. However, Pelletier recently argued that the term “environment” «transmits an envelope of exteriority» that does not correspond to the notion of milieu<sup>41</sup>. Thus, we can consider Vidal de La Blache’s view a simplification, even though he deserves credit for replacing the deterministic idea of humanity as subservient to nature with that of humanity interacting with nature and considering the geographical environment as a complex and multidimensional concept. In fact, until Vidal de La Blache, the components of the local environment were seen as objectively present and measurable “endowments” or “vocations” expressed by a given territory in terms of possibilities offered to human action. Local specificities and differences were thus considered objective characteristics of a territory that are described by adopting a viewpoint that is completely external to them<sup>42</sup>.

In contrast to this approach, the most recent explanations of milieu emphasise the subjective, interpretative and intentional content of any reference to territory and its specificities. Today, we can consider milieu a set of place-specific components constituting the territorial foundation of a specific collective identity and the local substrate of a development process<sup>43</sup>. Like cultural heritage, milieu describes the relationships between the past and the future, identity and development. Thus, milieu is composed of objects from the past

<sup>36</sup> Berque 1990, p. 28.

<sup>37</sup> Zanutelli 2022.

<sup>38</sup> *Ibidem*.

<sup>39</sup> Berdoulay 2017.

<sup>40</sup> Vidal de La Blache 2015.

<sup>41</sup> Pelletier 2016.

<sup>42</sup> Governa 2001.

<sup>43</sup> Governa 1997.

and includes collectively the specific values that these objects take on in the present in relation to the actions and projects of local actors. As Berque stated, the components of a milieu do not have an absolute value, i.e. we cannot speak of local aptitudes and vocations that have been expressed and defined once and for all. Again, they consist of a set of potentialities expressed by a given territory which, in order to be realised and constituted as resources in the development process, must be recognised, grasped and “used” by a given social organisation<sup>44</sup>: «society perceives its environment on the basis of the use it makes of it; reciprocally, it uses it on the basis of the perception it has of it»<sup>45</sup>.

Indeed, milieu is a relationship that humans build with their environment. It is not the relationship of a subject with an object, but a perspective in which the bipartition between the subject (society) and the object (nature) is eliminated<sup>46</sup>. Milieu is an ecological, technical and symbolic system in which we exist; a context full of signs and meanings in real environments. Living beings are modified in and through their milieu, just as the milieu is modified by and with societies<sup>47</sup>. Over its evolution, the concept of milieu does not simply refer to place, landscape, and context, but the importance of the relationship with human beings is fundamental: human beings are not acquiescent to nature, rather, they interact with it. Ultimately, milieu is complex, multidimensional and continuously interacting with human beings and society.

Moreover, it is both a source of history and identity and a useful resource for future development. If we analyse these aspects from a business perspective, we can also consider it a source of competitive advantage for brands and companies, especially those with roots in the local production context<sup>48</sup>. Indeed, as mentioned in the previous section (§ 2.1), the “deterritorialisation” of production factors has transformed the processes of mass consumption, triggering a cultural counter-drive. The “return to roots”<sup>49</sup> and the “mania for the authentic”<sup>50</sup> arise in new types of consumption, in which the genuine and the authentic are particularly desired components<sup>51</sup>. The competitive advantage of belonging to a specific territory derives from being inimitable and, therefore, represents an «image capital» for businesses<sup>52</sup>. Indeed, similarly to cultural heritage, *genius loci* and place-specific assets are factors of production capable of qualifying output and strengthening corporate reliability<sup>53</sup>. Therefore, it is

<sup>44</sup> Berque 1990, p. 103.

<sup>45</sup> Berque 1990, p. 44.

<sup>46</sup> Berque 2018.

<sup>47</sup> *Ibidem*.

<sup>48</sup> Montella, Silvestrelli 2020; Bernardi *et al.* 2021; Cerquetti, Romagnoli 2023.

<sup>49</sup> Lanternari 2006.

<sup>50</sup> Lipotevsky 2008.

<sup>51</sup> Cerquetti, Montella 2012.

<sup>52</sup> Montella, Silvestrelli 2020.

<sup>53</sup> Macario, Santovito 2016.

important to define strategies and tools that emotionally involve consumers, who are attracted by the intangible, symbolic and cultural characteristics of a product, as a further way to strengthen their loyalty<sup>54</sup>.

For companies, this can be particularly important, because making explicit reference to the territory in which the company operates can help communicate its values, vocations and resources and influence the company's development and orientation<sup>55</sup>. This is especially true for the sectors where the identities of places and heritage are intertwined in a nexus of practices<sup>56</sup>, such as the food and wine industry<sup>57</sup>. The demand for genuine, local, artisanal and traditional products from a territory is growing in the agri-food sector. Therefore, effective enhancement of the relationship between a company, its context and local assets can be a successful marketing strategy and trigger a virtuous cycle<sup>58</sup>.

In summary, cultural heritage and milieu have several traits in common (Tab. 1): both are a source and a resource, are defined and transformed by their relationship with human beings and the environment, have a relationship of reciprocal influence with society and, finally, both have a production value that makes them important assets for a territory.

	<i>Cultural heritage</i>	<i>Milieu</i>
<b>Source and resource</b>	Cultural heritage is no longer a mere source of historical knowledge (incorporating an intrinsic value), but also a resource capable of creating multi-stakeholder and multidimensional value.	Milieu is both a source of history and identity and a useful resource for future development.
<b>Relationship between human beings and the environment</b>	Cultural heritage is defined and continuously reshaped by people's relationships with their environment.	Milieu is not only composed of objects from the past, but also includes the specific values that these objects take on in the present, in relation to the actions and projects of local actors.
<b>Mutual relationship with society</b>	Cultural heritage is "a matter of perception", thus not an intrinsic property of objects, but a construction, an invention. Its role in and for society is constantly evolving: it has changed over time and will change in the future.	Milieu is a relationship that humans build with their environment. It is not the relationship of a subject with an object, but a perspective in which the bipartition between the subject (society) and the object (nature) is eliminated. Living beings are modified in and through their milieu, just as a milieu is modified by and with societies.

<sup>54</sup> Montella, Silvestrelli 2020.

<sup>55</sup> Cantù, Bernardi 2019.

<sup>56</sup> Spielmann *et al.* 2021.

<sup>57</sup> Riviezzo *et al.* 2016; Sgroi *et al.* 2020; Cerquetti *et al.* 2022; Cerquetti, Romagnoli 2023.

<sup>58</sup> Askegaard, Kjeldgaard 2008; De Nisco, Napolitano 2017.

<p><b>Production value</b></p>	<p>Cultural heritage can influence value creation, particularly for “Made in” businesses. It can be a factor of production and become a resource for a company’s competitive positioning in the glocal context.</p>	<p><i>Genius loci</i> and place-specific resources are factors of production that qualify output and strengthen corporate reliability.</p>
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Tab. 1. Common traits of cultural heritage and milieu

### 2.3. UNESCO cultural landscapes: an asset for tourism and local development

As discussed in the previous sections (§§ 2.1 and 2.2), cultural heritage and milieu have many aspects in common. Indeed, keeping culture and nature separate can sometimes be a challenge. At an international level, the first legal recognition of the joint value of culture and nature can be found in the *Convention Concerning the Protection of the World Cultural and Natural Heritage*, approved by the UNESCO General Conference in Paris on 16 November 1972. This document established for the first time a common regime for the conservation and protection of the most important human productions and works of nature<sup>59</sup>.

The first two articles of the Convention give definitions for cultural heritage and natural heritage in the form of lists of constituents: cultural heritage includes monuments, groups of buildings and sites, while natural heritage consists of natural features, geological and physiographical formations and natural sites. In both cases, as already argued in the previous section (§ 2.1), the main requirement for inclusion on the list is “outstanding universal value” (OUV).

UNESCO’s approach to cultural heritage placed considerable importance on the traditional categories of art history, great monuments and great civilisations. The concept of cultural heritage itself was limited to masterpieces and a narrow and limited understanding, mostly European, Christian and monumental<sup>60</sup>. Criticism of this approach led to debate during and after the drafting of the 1972 UNESCO Convention. UNESCO changed its paradigms: making adjustments that reflected the evolution of the World Heritage concept itself also led to an evolution of the concept of cultural and natural heritage and the relationship between them. Indeed, the criteria that must be met to be listed on the WHL are regularly revised.

Initially, the treaty separated the two categories: World Heritage Sites of OUV were selected on the basis of six cultural and four natural criteria. Only in Natural Criterion II (“as interaction between man and his natural environment”) and Natural Criterion III (“exceptional combinations of natural and

<sup>59</sup> Francioni, Lenzerini 2008, pp. 4-5.

<sup>60</sup> Bortolotto 2007, p. 40.

cultural elements”)<sup>61</sup> is there a reference to the interaction between the two categories. To reiterate this clear division, responsibilities were also clearly apportioned: the International Council on Monuments and Sites (ICOMOS) would be in charge of assessing cultural sites, and the International Union for Conservation of Nature (IUCN) would assess natural sites<sup>62</sup>. In the following years, the debate around World Heritage continued, leading to the introduction of “cultural landscapes” to the list in 1992. Cultural landscapes embody

the combined works of nature and of man [...]. They are illustrative of the evolution of human society and settlement over time, under the influence of the physical constraints and/or opportunities presented by their natural environment and of successive social, economic and cultural force, both external and internal<sup>63</sup>.

The introduction of the cultural landscape category shifted World Heritage to an anthropological view of culture<sup>64</sup>. Later, in 2003, the Sixth Extraordinary Session of the World Heritage Committee<sup>65</sup> decided to merge the ten criteria, thus marking a significant step towards a holistic approach to cultural and natural heritage<sup>66</sup>.

UNESCO has also placed emphasis on the relationship between cultural heritage and natural heritage, culture and milieu. If this link is enhanced, it can be a resource for sustainable development and tourism, even more so if the UNESCO label is added to this dynamic.

The primary objective of UNESCO WHL membership is to protect and preserve assets of exceptional value from potential damage. In addition, this recognition can also affect tourism and local development. Indeed, a World Heritage-listed site can leverage the UNESCO label to attract cultural tourists, convince donors, strengthen political support and raise awareness of the importance of conservation and/or restoration<sup>67</sup>. Moreover, this recognition is considered an indicator of a site’s value and quality<sup>68</sup>, hence increases its popularity<sup>69</sup>.

In official UNESCO documents, the positive effects of heritage on tourism are taken for granted. However, the effectiveness of WHL in promoting tourism and economic growth is an open and controversial question<sup>70</sup>. Even if WHL membership is supposed to produce many positive externalities in

<sup>61</sup> <<https://whc.unesco.org/archive/opguide77b.pdf>>, 06.11.2023.

<sup>62</sup> Brumann, Gfeller 2022.

<sup>63</sup> UNESCO 1994, p. 13.

<sup>64</sup> Brumann, Gfeller 2022.

<sup>65</sup> <<https://whc.unesco.org/en/decisions/6165/>>, 06.11.2023.

<sup>66</sup> Porcal-Gonzalo 2023.

<sup>67</sup> Wuepper, Patry 2017, p. 2.

<sup>68</sup> Buckley 2004.

<sup>69</sup> Cochrane, Tapper 2006; Ryan, Silvano 2009.

<sup>70</sup> Cuccia *et al.* 2016.

the States Parties<sup>71</sup>, the scientific literature has extensively explored its different effects. Some scholars agree that inscribing properties on the list, as a prestigious, external recognition that indicates authenticity and quality to international tourists<sup>72</sup>, is a powerful heritage enhancement tool that should positively attract tourist flows and promote economic growth and local development<sup>73</sup>. In addition to affecting tourist flows, other benefits of WHL membership are increased awareness on the part of local populations, identity and participation in heritage enhancement and conservation.

However, tourism development can also have negative impacts, especially on sustainability<sup>74</sup>. In particular, UNESCO recognition entails the risk of neglecting residents' needs in favour of tourists, such as when some offerings are re-designed for visitors. This reorientation may lead to the disappearance of traditional activities that are functional to local communities and turn places into inauthentic, staged "non-places" that are socially degraded and economically and civically impoverished<sup>75</sup>. In addition to these negative economic and socio-cultural externalities, increased visitor numbers can lead to congestion, pollution, deterioration of heritage sites, damage to natural sites and unsustainable tourism development<sup>76</sup>.

Therefore, World Heritage Site status holds very interesting potential for heritage enhancement, protection, and territorial development, but is a double-edged sword. It can bring tourism and development, but there is also a risk of creating negative outcomes for the territory.

### 3. *Research context: Les Climats du Vignoble de Bourgogne (France)*

When we look at the French wine sector, there are two things we can consider. First, according to data presented by Statista in 2022, France was the third largest wine market in the world in 2021 and is estimated to be the second largest country by wine market value in 2025<sup>77</sup>. Furthermore, according to the OIV (International Organisation of Vine and Wine), in 2022, France was the second largest country by production<sup>78</sup> and the first wine-exporting

<sup>71</sup> De Simone *et al.* 2019.

<sup>72</sup> Cochrane, Tapper 2006; Ryan, Silvano 2009; Wuepper, Patry 2017.

<sup>73</sup> Yang *et al.* 2011; Cellini 2011.

<sup>74</sup> Landorf 2009; Pencarelli, Splendiani 2010; Lo Piccolo *et al.* 2012; Caust, Vecco 2017; Tesfu *et al.* 2018; Tien *et al.* 2019.

<sup>75</sup> Pencarelli 2020.

<sup>76</sup> Van der Borg *et al.* 1996; Assumma *et al.* 2022; Boháč, Drápela 2022.

<sup>77</sup> Statista 2022.

<sup>78</sup> OIV 2023, p. 9.

country by value (in billions of euros), while it was the third largest wine-exporting country in the world by volume<sup>79</sup>. On the basis of these numbers, France can be considered one of the major producers and exporters able to sell wines at high prices and to enhance the value of its wines. One of the best-known wine regions in France is Burgundy, where 5% of the national wine volume is produced, and the wine and spirits sector generates 11% of the national turnover<sup>80</sup> (Fig. 2).

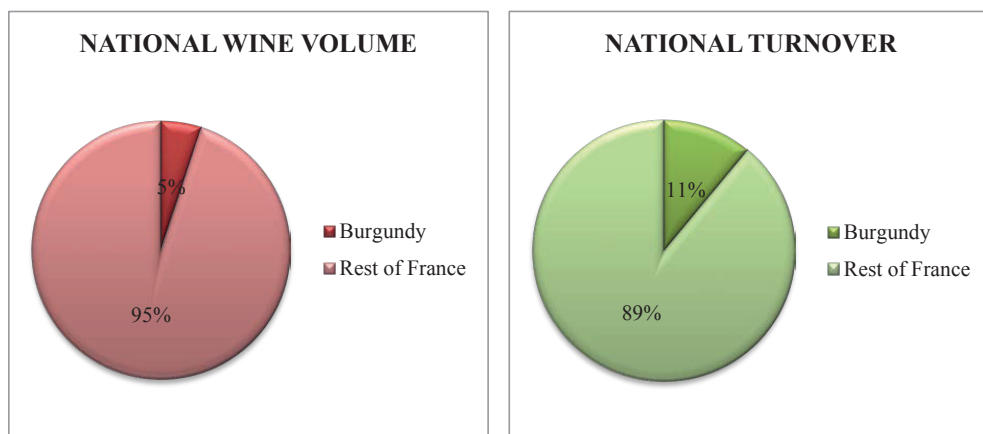


Fig. 2. Wine and Spirits sector in Burgundy (Source: own elaboration from data from the Institut National de L'Origine et de la Qualité 2019)

The second consideration relates to tourism. According to Orange Flux Vision Tourisme data (2023)<sup>81</sup>, Burgundy recorded almost 25 million arrivals in 2021 and more than 30 million in 2022. Tourists are interestingly recognising the region's cultural heritage, the chance to visit towns and villages, the region's gastronomy and vineyards as strengths<sup>82</sup>. Therefore, the wine sector is not only important for the revenue it creates for wineries, but also for the role it plays for the cultural and tourism sector.

Thus, wine, cultural heritage, milieu and tourism are strongly linked. In Burgundy, *terroir* and the "heritisation" of wine have assumed a special significance. Indeed, the relationship between place and wine has taken shape within a historical landscape, consisting of the *climats*<sup>83</sup>, the winegrowing model which originated in this region and has withstood changes, ruptures and his-

<sup>79</sup> OIV 2023, p. 17.

<sup>80</sup> Institut National de L'Origine et de la Qualité 2019.

<sup>81</sup> <<https://pros.bourgognefranchecomte.com/observatoire/orange-flux-vision/>>, 06.11.2023.

<sup>82</sup> Observatoire Stratégie Programmation 2022.

<sup>83</sup> Whalen 2010; Garcia 2011; Association pour l'inscription des Climats du vignoble de Bourgogne 2012; Garcia, Jacquet 2020.



torical crises. In 2015, the *Climats du Vignoble de Bourgogne* were inscribed on the UNESCO list of World Heritage Sites, as they are considered combined works of human beings and nature and areas of outstanding universal value. The site was included in the UNESCO list on the basis of criteria III<sup>84</sup> and V<sup>85</sup>.

According to the report on the application for inscription on the UNESCO WHL:

Les «climats» bourguignons – le Montrachet, la Romanée-Conti, le Chambertin, les Cailles... il y en a 1247 au total – sont des portions du vignoble, précisément délimitées et de superficie réduite, nées des conditions naturelles de sols, d'exposition au soleil ou aux vents, et héritières du travail humain qui les a façonnées, révélées et hiérarchisées au cours d'une longue histoire qui remonte à l'époque romaine<sup>86</sup>.

Thus, the *Climats* of Burgundy are a *terroir*-based viticulture model composed of precisely delimited plots of land, each with its own characteristics. The *climats* are located in a strip of land that extends almost sixty kilometres from Dijon to the area south of Beaune, to a maximum width of one or two kilometres (Fig. 3)<sup>87</sup>.

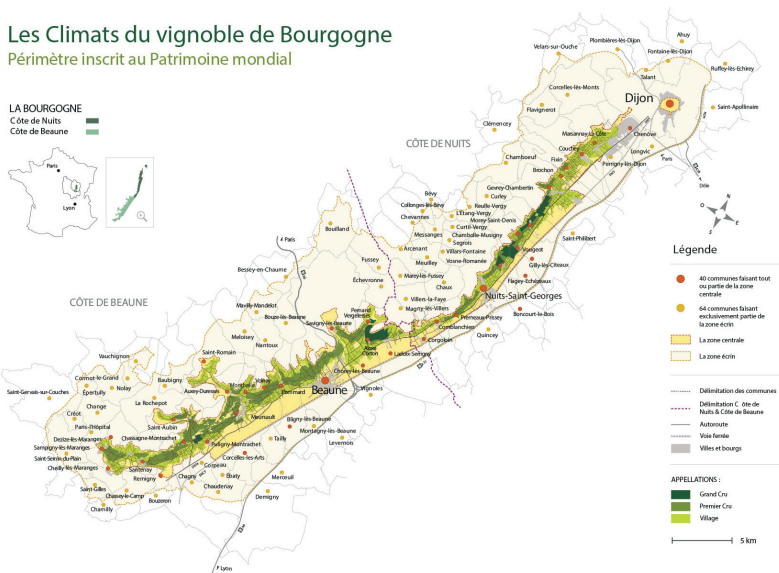


Fig. 3. The Climats of Burgundy (Source: website of the BIVB – Vins de Bourgogne)

<sup>84</sup> According to criterion III the site has «to bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared».

<sup>85</sup> According to criterion V the site has «to be an outstanding example of a traditional human settlement, land-use, or sea-use which is representative of a culture (or cultures), or human interaction with the environment especially when it has become vulnerable under the impact of irreversible change».

<sup>86</sup> Association pour l'inscription des Climats du vignoble de Bourgogne 2012.

<sup>87</sup> *Ibidem*.

The UNESCO site includes 1247 *climats* and their related architectural heritage, i.e. the *clos*, dry-stone walls, *cabottes* (stone huts) and *meurgers*, *cuveries*, *caves*, winegrowers' houses, historic buildings, but also the old towns in Beaune and Dijon<sup>88</sup>.

The application process for the UNESCO List began in 2006 and involved various actors who, in 2007, established the *Association des Climats du Vignoble de Bourgogne*. Members of the association include all local actors, the mayors of the cities of Dijon and Beaune, the elected officers from the local authorities, the region and the department of Côte-d'Or, and professionals from the wine sector. The *Association des Climats du Vignoble de Bourgogne* had the task of producing and publicising the application dossier. Now its role is to continue managing the listed site, to liaise with UNESCO and organise mediation and knowledge promotion regarding the *Climats du Vignoble de Bourgogne*.

One of the members of the *Association des Climats du Vignoble de Bourgogne* is the Bourgogne Wine Board, *Bureau Interprofessionnel des Vins de Bourgogne* (BIVB). The BIVB is an association that defends and promotes the know-how and traditions of the local trade and viticulture professions. As an interprofessional organisation, the BIVB brings together the viticulture and wine trade and defines its strategic orientations, while defending the interests of Burgundy wines. To this end, it undertakes initiatives with the professional and amateur public, while providing technical support and market advice to professionals. The BIVB is organised into four divisions with clearly defined areas of competence, all of which contribute to the promotion of Burgundy wines: Technical and Quality, Markets and Development, Marketing and Communication and Administration and Finance. The Marketing and Communication Division promotes Burgundy wines in France and abroad. It designs and distributes marketing messages and campaigns. Above all, it helps train selectors (wine merchants, restaurateurs, importers, etc.) and provides consumers with information.

#### 4. *Research methodology*

In order to answer our research questions, the field research investigated the role of cultural heritage and milieu in Burgundy's wine production and related activities, to understand the extent to which they contribute to the sector and sustainable tourism development.

<sup>88</sup> Association pour l'inscription des Climats du vignoble de Bourgogne 2012.

A qualitative approach, namely the exploratory case study methodology<sup>89</sup>, was adopted to answer our research questions. According to Yin<sup>90</sup>, this method enables an empirical investigation of a contemporary phenomenon within its natural context, using multiple sources of evidence.

We used several complementary data sources to thoroughly analyse the phenomenon. First, six months (March-September 2022) were spent in the Dijon area, during which a desk analysis was made and observational surveys were carried out by visiting places of special interest. The desk analysis looked at the websites and social media accounts of local actors, tourism actors and wine producers to gain a better understanding of the research context. From there, key places were visited in the area of the *Climats du Vignoble de Bourgogne* UNESCO WHL site (Tab. 2).

<i>Visited sites</i>	<i>Brief description</i>
Town of Beaune	The town of Beaune is an integral part of the <i>climats</i> cultural landscape. Together with the area's vineyards, it represents the commercial dimension of the production system <sup>91</sup> .
Dijon Old Town	The old town of the city of Dijon is part of the UNESCO site, as it embodies the normative and political force that gave rise to the <i>climats</i> system <sup>92</sup> .
Hospices de Beaune (or Hôtel Dieu)	The Hospices de Beaune was founded as a hospital for poor people at the end of the Hundred Years' War and was completed in 1452. From the second half of the 1400s, the Hospices de Beaune began receiving vineyards as donations, and this tradition continued for five centuries. Today, the wine estate covers about 60 hectares, 50 of which are dedicated to Pinot Noir and the rest to Chardonnay. The hospital was active until 1971. Today, the Hospices de Beaune has become a museum and every November it hosts a wine auction where the fine wines from its vineyards are sold. The revenue from the auction is used to improve equipment and conserve the Hôtel Dieu <sup>93</sup> .
Maison des Climats	Using technologies such as augmented reality, the <i>Maison des Climats</i> provides the tools to understand the <i>climats</i> of the Burgundy vineyard and how the notion of <i>terroir</i> has been constructed over 2000 years in the Côte-d'Or, and discover the cultural heritage that characterises this cultural landscape <sup>94</sup> .

<sup>89</sup> Tellis 1997; Yin 2002; Stake 2008; Yin 2018.

<sup>90</sup> Yin 2002.

<sup>91</sup> <<https://whc.unesco.org/en/list/1425/>>, 06.11.2023.

<sup>92</sup> <<https://whc.unesco.org/en/list/1425/>>, 06.11.2023.

<sup>93</sup> <<https://www.beaunefrancia.com/descubrir/los-hospicios-de-beaune>>, 06.11.2023.

<sup>94</sup> <[https://www.climats-bourgogne.com/en/maison-des-climats\\_647.html](https://www.climats-bourgogne.com/en/maison-des-climats_647.html)>, 06.11.2023.

Palais des États de Bourgogne in Dijon	The <i>Palais des États de Bourgogne</i> is the former residence of the Dukes of Burgundy. The importance of the Dukes of Burgundy lies in their constant drive to produce high-quality wines. From the 10th to the 15th century, Burgundy wine's considerable economic and cultural influence began to expand, thanks to the Dukes of Burgundy. The Dukes ensured that Burgundian vineyards held significant economic and cultural influence in much of Europe, with Northern Europe as their primary market. Wine quality was considered important for two reasons. The first was the reputation of the Duchy. The second reason was related to the difficulty involved in transporting the product, hence the quality – and the price – had to be high to justify the effort <sup>95</sup> .
Château du Clos de Vougeot	The chateau is located inside the Clos de Vougeot, a walled vineyard that is the largest single vineyard in the Côte de Nuits region (about 50 hectares). It was created by the Cistercian monks of the Abbey of Cîteaux. The Château du Clos de Vougeot was later added by expanding a small chapel and other buildings that already existed on the site. The chateau was bought in 1945 by the Confrérie des Chevaliers du Tastevin and became the fraternity's headquarters. Although Château du Clos de Vougeot no longer produces wine, it remains the symbol of Burgundy's millennial history <sup>96</sup> .

Tab. 2. Key places visited in the area of the *Climats du Vignoble de Bourgogne* UNESCO WHL site

The research also included semi-structured interviews with key actors (Tab. 3). Specifically, associations linked to the wine and culture sector, actors from the tourism sector and wine producers were involved. The interviews with local actors were conducted between July 2022 and September 2022, and those with wine producers in January 2023. Interviews were conducted in English or French, either in person or online, and lasted between 27 and 72 minutes. They were recorded, transcribed and analysed manually.

	<i>Respondent category</i>	<i>Date (dd/mm/yyyy)</i>	<i>Length</i>	<i>Language</i>	<i>Online/ Face-to-face</i>
1.	GIP Pole Bourgogne Vigne et Vin	13/07/2022	72 min	French	Face-to-face
2.	BIVB (Management)	26/07/2022	45 min	French	Online
3.	BIVB (Marketing and Communication)	28/07/2022	31 min	English	Online
4.	Former wine producer	04/08/2022	27 min	English	Face-to-face
5.	Tourist guide	25/08/2022	29 min	English	Face-to-face

<sup>95</sup> De Villaine 2020.

<sup>96</sup> <<https://www.closdevougeot.fr/en/>>, 06.11.2023.

6.	Association des Climats du Vignoble de Bourgogne	13/09/2022	48 min	French	Online
7.	Wine producer	19/01/2023	42 min	French	Online
8.	Wine producer	19/01/2023	32 min	French	Online

Tab. 3. Summary of the interviews with key actors

The aim of the interviews was to investigate specific aspects, including:

1. *The relationship between cultural heritage, milieu, and the wine industry's marketing strategies:* as already discussed, cultural heritage and milieu are closely interrelated. Both have a strong connection with human beings and society and both are sources and resources. Therefore, the two can be factors of production in marketing activities, by qualifying output and its value. Thus, they are important assets for creating a sustained competitive advantage<sup>97</sup>. This is particularly true for “Made in” companies, such as the wine industry, where the link and the potential are particularly evident. As argued by Phillips, «wine is perhaps the most historically charged and culturally symbolic of the foods and beverages with which we regularly have contact»<sup>98</sup>. The vine is an integral part of the culture and tradition of many winegrowing regions and references to place play an important role in marketing the sector<sup>99</sup>. Indeed, wine is intrinsically linked to the place where the vine is planted<sup>100</sup>, one of the fundamental aspects of wine quality is *terroir*. Given the nature of wine as a product, it was deemed interesting to investigate whether and how producers and stakeholders in the sector perceive this relationship and whether the cultural aspects embedded in this product are also enhanced and utilised in the sector's marketing strategies.
2. *The effects of the UNESCO declaration in the field of tourism:* the analysis of the connection between cultural heritage, milieu and UNESCO WHL membership highlighted that one area that benefits from WH status is tourism<sup>101</sup>, even though the effects of tourism development can be both positive<sup>102</sup> and negative<sup>103</sup>. On the basis of these considerations, the effects on tourism of WHL inscription were investigated for *Climates du Vignoble de Bourgogne*.

<sup>97</sup> Macario, Santovito 2016.

<sup>98</sup> Phillips 2000, p. 14.

<sup>99</sup> Banks *et al.* 2007.

<sup>100</sup> Patterson *et al.* 2018.

<sup>101</sup> Cochrane, Tapper 2006; Ryan, Silvanto 2009; Cuccia *et al.* 2016; Wuepper, Patry 2017.

<sup>102</sup> Cochrane, Tapper 2006; Ryan, Silvanto 2009; Yang *et al.* 2011; Cellini 2011; Wuepper, Patry 2017.

<sup>103</sup> Van der Borg *et al.* 1996; Landorf 2009; Lo Piccolo *et al.* 2012; Caust, Vecco 2017; Tesfu *et al.* 2018; Tien *et al.* 2019; Assumma *et al.* 2022; Boháč, Drápela 2022.

3. *The role of the UNESCO declaration on the performance and success of wineries*: besides affecting tourism, UNESCO WHL inscription may also touch other sectors and stakeholders, such as residents, in terms of quality of life, the way it is managed<sup>104</sup> and sustainable development<sup>105</sup>. Here it was decided to analyse whether and how inclusion on the UNESCO WHL affected the wine sector in terms of sales and brand image.
4. *Collaborations between different local actors*: the UNESCO Operational Guidelines for implementing the World Heritage Convention<sup>106</sup> emphasise that collaboration between management authorities, rights holders, stakeholders in the area and local communities is crucial for good management of WHL-registered sites. Collaborations between several stakeholders in the territory may promote the creation of local cultural ecosystems based on cooperation between public and private actors and citizens operating in different sectors, potentially leading to positive effects on the territory's socio-economic development. However, challenges may occur if there is no custom of working on this type of initiative or there is a lack of resources, there is mistrust between partners or they have divergent requirements<sup>107</sup>. The purpose is to investigate how these partnerships were managed and understand the role they played in successful management of the *Climats du Vignoble de Bourgogne* UNESCO site.
5. *The role of sustainability in management policies*: one of the most pressing issues today is sustainability, i.e. meeting «the needs of the present without compromising the ability of future generations to meet their own needs»<sup>108</sup>. Climate change is an important issue that the wine industry faces, with effects, now and in the future, on production<sup>109</sup>, but also on wine tourism<sup>110</sup>. However, sustainability is not only related to the environment. All four pillars of sustainability and sustainable development – environmental, economic, social and cultural – are considered<sup>111</sup>. Indeed, cultural heritage and cultural heritage management also have a distinct role to play in the construction of a sustainable future<sup>112</sup>. The aim here is to understand how respondents perceive sustainability and what actions are implemented in sustainability management.

<sup>104</sup> Vollero *et al.* 2016; Hanafiah *et al.* 2021; Esmailpoor *et al.* 2023.

<sup>105</sup> Landorf 2009; Lo Piccolo *et al.* 2012; Caust, Vecco 2017; Tesfu *et al.* 2018; Tien *et al.* 2019.

<sup>106</sup> <<https://whc.unesco.org/en/guidelines/>>, 06.11.2023.

<sup>107</sup> Borin 2015.

<sup>108</sup> Brundtland 1987.

<sup>109</sup> Cardel *et al.* 2019; Santos *et al.* 2020.

<sup>110</sup> Sottini *et al.* 2021.

<sup>111</sup> Soini, Birkeland 2014; Sabatini 2019.

<sup>112</sup> Holtor, Högberg 2020.

## 5. Research results

Complementary sources, including desk analysis, an observational survey and visits to key sites provided a thorough understanding of the context and its characteristics. The field research revealed a territory that puts a lot of energy and resources into wine and recognises its cultural importance. Small winegrowing villages like Aloxe-Corton, Chenove, Nuit-Saint-George, Vougeot and others are an integral part of the cultural landscape of the *climats*. In addition, there are many cultural places where the *climats* system and the relationship between cultural heritage, milieu and wine are emphasised, like the *Maison des Climats* in Beaune. In addition to these sites, numerous local events and festivals are organised. *Saint Vincent*, *Les Grand Jours de Bourgogne* and the *Mois de Climats* are among the best known.

The fieldwork provided a better understanding of the territory, which in turn informed the way the interviews were handled. For clarity, the results are organised by topic, as presented in the methodology section. The results are also summarised in Table 4.

### 5.1. Relationship between cultural heritage, the wine industry and marketing

The interviews with stakeholders revealed a strong awareness of the link between cultural heritage, the wine sector, and marketing. All the interviewees mentioned interrelationship between wine and cultural heritage, as well summarised by one interviewee: «our wine without history is not our wine» (KI 4, own translation).

In terms of marketing, the BIVB plays a vital role in promoting the quality of Burgundy wines and strengthening the overall image of the sector. One of the interviewees noted that «if you say Beaune, Monthelie, or others, people may not know that this appellation is in Burgundy, so we have asked all our wineries to state *Vin de Bourgogne* or *Grand Vin de Bourgogne* on their labels, depending on the appellation» (KI 8). Although BIVB communications focus on more technical aspects, cultural heritage is considered a defining feature of the image of *Vins de Bourgogne*. The values recognised are therefore «*terroir*, history, excellence, human, elegance, authenticity, know-how» (KI 8). As cultural heritage is a key factor in a wine's image internationally, stakeholders devote special attention to it and promote activities to protect and enhance it. This is demonstrated by the involvement of many local actors in the application process for UNESCO World Heritage status and the considerable investments made in cultural heritage. For example, several actors finance and run restoration projects involving tangible cultural heritage, heritage research projects, training projects for wine producers on the subject of cultural her-



itage, and even the construction of three *Cités de Climats et de Vins Bourgogne*, in Chablis, Beaune and Macon.

As regards the wine producers, the small number of interviewees revealed two very different ways of viewing and approaching cultural heritage. On the one hand, there is awareness that showcasing culture is an important way for the industry to differentiate its product in the market and gain a competitive advantage; on the other hand, some wine producers do not consider it an important aspect. In this second case, it is explained that «it's how this narrative was built at the beginning of the 20th century, with writing about labels, coats of arms, etc. We built an entire narrative about history, we invented a story that was used to construct the product» (KI 1, own translation). Therefore, there is scepticism about the way the history of the region and its wine is narrated and used, as a constructed, invented history. Nevertheless, wine producers recognise that history is important for the industry, particularly when it comes to competing on the international market. The *climat* concept, along with everything related to it, has an important meaning that is «actually commercial» (KI 1, own translation). Even though the storytelling around culture and history can stem from different points, there is a widespread awareness of the role it plays for the sector in terms of market positioning.

Regarding the enhancement and use of cultural heritage in communication and marketing practices, interviewees revealed that *domaines* do not engage in any particular communication activities, because they know that their own activities and cellars already intrinsically communicate values. In addition, there is also a strong awareness of the potential offered by regional history, by Burgundy's connection to wine, as a resource for family businesses. To some extent, therefore, enhancement takes place «naturally» (KI 2, own translation). However, this is not always sufficient for reaching international markets, which require a different communication strategy, in this case based on associations.

Therefore, the individual wineries, especially the small ones, do most of the presenting and promoting onsite, during visits, tastings or events, and benefit from the work of the associations in terms of the image of Burgundy wines at an international level. Thus, local cultural heritage supports marketing activities to achieve a unique and strongly identity-based competitive position in the global wine market.

## 5.2. *The effects on tourism of the UNESCO declaration*

The case of Burgundy confirms that UNESCO WHL status has had both positive and critical effects on tourism.

The positive effects include increased exposure of the Burgundy Region and its wines, which raises the image value of the *Vins de Bourgogne*. As men-



tioned by many interviewees, «tourism is not necessarily immediately useful for selling, it's useful for enhancing your image» (KI 4, own translation).

With respect to the changes in tourism, one of the local stakeholders said, «the idea is not to increase the number of visitors, which could disrupt both tourism and the towns. The idea is rather to welcome new visitors who are more interested in wine, but also in the cultural landscape, in the way winegrowers work, the know-how, the whole oral tradition, the word of the winegrower – new visitors who take more time to discover the region» (KI 3, own translation). Therefore, the goal is to have a qualitative, not quantitative, change in tourist arrivals. So far, this shift appears not to have taken place, or, at least, is not complete. Conversely, the increase in visibility and tourist flows come with some critical issues and several reflections emerged during the interviews.

One of the first thoughts concerns this rise in arrivals. Burgundy was already a tourist destination and a further increase was not perceived as a primary need. Moreover, some interviewees consider it a paradox that tourism has remained high despite the increasing refusal of *domaines* to receive visitors. Many producers are small family businesses selling wine through other channels and do not have enough products to sell to tourists or for tastings and have limited human resources. More respondents said that «almost none of the small winegrowers are open on Sundays» (KI 7); or «if it's to sell one bottle, I have no interest in doing it, because I don't have any employees to do the visits» (KI 2, own translation). The relationship with tourism changes depending on the size and fame of the winery. Larger wineries have suitable hospitality facilities for paid visits and tastings, without needing to convert visitors into buyers. Consequently, there is a distinction between tourists who go to the more famous *domaines* and those who go to lesser-known family *domaines*. The former are more interested in the cultural/tourist aspects, whereas the latter are more interested in wines and purchasing. Another critical issue to emerge from the interviews is incompatibility of copious tourism and vineyard activities. Indeed, the problematic coexistence of tourists and wine-making activities, which require the use of machines, people, and treatments, and the presence of numerous tourists can generate more potential conflicts and tension.

In addition, according to some interviewees, the region is insufficiently equipped to receive a high number of tourists. This is perhaps because the tourism sector has in recent years struggled to meet the high demand, partly due to the Covid-19 pandemic. One of the interviewees points out that tourism has increased by 30% at other UNESCO World Heritage Sites. This trend for Burgundy would not be sustainable because the type of hospitality the region offers would not be able to handle certain flows. After all, «just the roads in the vineyards are too narrow, it's very difficult to drive in the vineyard, it's very difficult to find a parking place, it's very difficult to find a restaurant» (KI 5).

### 5.3. *The effects of the UNESCO declaration on the performance and success of wineries*

UNESCO WHL inscription has also had an impact on the wine sector. As in the case of tourism, the interviewees highlighted positive results but also critical issues.

One of the positive aspects that has emerged is that inscription has re-legitimised the term *climat* among wine producers, consumers, professionals and tourists. One of the interviewees explained that «we've realised that this model of viticulture is so demanding, because it's a familiar one, that winegrowers work the soil, the plants, right through to wine production, right through to marketing, and it's often the winegrower who does the pre-sales, goes abroad, travels a lot internationally, so it's demanding. We think they must have forgotten a little about the social and cultural level, and the role of winegrowing in this area» (KI 3, own translation). Therefore, wine producers in Burgundy, mainly small family businesses with limited economic and human resources, have prioritised production and marketing needs over the cultural and social aspects of their work. The UNESCO WH listing has safeguarded the tangible and intangible heritage linked to *climats* and its fundamental role in the conservation of biodiversity and the social and cultural aspect of the vineyard. Regarding the effect on the market and environment, UNESCO recognition has clarified the meaning of the term *climat* and better explained that «we think in terms of parcels, because people all over the world don't really understand, they can't understand when we tell them that the wine from this parcel had a certain taste and the one next to it doesn't have the same taste» (KI 4, own translation).

Therefore, UNESCO recognition has reconnected and refocused attention on the relationship between human beings, *milieu* and cultural heritage. The re-legitimation and restored importance of the *climats* as a cultural landscape has had another positive effect, namely protection of biodiversity and also of the way wine is produced (from the grape harvest to the way the vines are pruned, etc.), which many of those interviewed acknowledged. Without this protection and the investment that came from the inscription, there was a chance that all this might have disappeared. Interesting thoughts emerged during the interviews, such as the risk of the disappearance of the know-how due to depopulation and the consequent need to mechanise or hire people from outside the region.

On the other hand, inclusion on the UNESCO WHL has also created critical issues that emerged from several interviews, such as the role of foreign investors. Indeed, the increased visibility and value of the site resulting from WH status has led to greater interest in investing in wine in Burgundy, which has consequences. The problem with the arrival of foreign investors is that they have enormous economic capacities with which the family *domaines* cannot compete. Consequently, this drives up the price of land and it becomes more

and more attractive to sell it. This increases the risk of losing part of the identity of the *climats* wine system, made up of family *domaines* that have passed on know-how from generation to generation.

A further critical issue that emerged is related to the perception that UNESCO WH status comes with a risk of crystallisation for the wine sector, as a result of additional rules with the potential to stop development. On this matter, one of the interviewees said, «if it becomes a museum of wine, our winemaking model becomes fixed» (KI 6, own translation).

#### 5.4. *Collaborations between different local actors*

Interviews show that collaboration between different local actors is a key part of managing the *climats*. The establishment of working committees dealing with various topics enables careful, targeted management of several aspects, as these committees take care of «all areas of site management work on heritage, the environment, winegrowing, of course, town planning, mobility, transport and so on. So, we have a whole range of committees, and these committees include all the local and regional players who have skills, missions or activities in this area» (KI 3, own translation). One of the interviewees said that «the rationale is really one of association life» (KI 6, own translation), and a special role is played by the *Association des Climats du Vignoble de Bourgogne*, whose mission is to engage with and coordinate all actors involved in managing the World Heritage site. Before the start of the application process for UNESCO World Heritage Site status, collaboration was different. Although Burgundy, and particularly the Côte-d'Or department, was already well developed, wines were very important, and the economy and industry well established, there was no collaboration between the various local actors and, in some cases, there were even tensions among them. As with all systems where there is collaboration between several actors, some situations are more difficult than others, and some aspects work more than others.

#### 5.5. *The role of sustainability in management policies*

Sustainability and sustainable development are important issues for all respondents. However, most of them only focused on environmental sustainability. One respondent explained that «because of global warming, the hills are declining, so we don't make as much wine as we did before. Because of that, many sellers are closed because there is nothing for them to sell» (KI 5). Producers and stakeholders stated that they were aware of this situation and the need to implement changes in practices, such as using fewer pesticides or reducing their carbon footprint.

Few mentioned economic sustainability as a consequence of environmental problems. One of the wine producers said, «and also the economic aspects, because when a region makes 45% of its sales from 10% of its wine, this raises economic questions» (KI 1, own translation).

In one interview, however, the cultural, social and economic aspects emerged as being closely linked. The interviewee explained that efforts are being made to engage with small villages, both culturally – by launching events, cultural initiatives to talk about *climats*, breathe new life into the relationship with winegrowing and among the inhabitants – and economically and, therefore, socially, by trying to provide services, as there are increasingly fewer of them in the villages. As one of the interviewees said, the reasons behind these strategies are that «we believe that if the villages stay alive, winegrowing will continue to exist. If the villages die out and become a bunch of second homes, our winegrowing model could change completely» (KI 3, own translation).

LIGHT	SHADE
<i>Relationship between cultural heritage, the wine industry and marketing</i>	
<ul style="list-style-type: none"> <li>– There is widespread awareness of the importance of the link between cultural heritage and the wine sector</li> <li>– Cultural heritage is considered a key identity factor for Burgundy wines</li> <li>– Brand umbrella <i>Vins de Bourgogne</i> implemented strategies to enhance this relationship</li> <li>– There is investment in the cultural heritage sector</li> </ul>	<ul style="list-style-type: none"> <li>– Not all wine producers consider this relationship important</li> <li>– Not all producers have the resources to implement such strategies</li> </ul>
<i>The effects of the UNESCO declaration on tourism</i>	
<ul style="list-style-type: none"> <li>– Increase in tourist flows</li> <li>– Increase in the value of the <i>Vins de Bourgogne</i> brand image</li> </ul>	<ul style="list-style-type: none"> <li>– Difficulties handling larger numbers of tourists</li> <li>– Differences between small and large <i>domaines</i></li> </ul>
<i>The effects of the UNESCO declaration on the performance and success of wineries</i>	
<ul style="list-style-type: none"> <li>– Re-legitimisation of the term <i>climat</i></li> <li>– Protection of the production system and know-how</li> </ul>	<ul style="list-style-type: none"> <li>– Risk of losing part of identity due to foreign investments</li> <li>– Perceived risk of paralysis of the wine sector</li> </ul>
<i>Collaborations between different local actors</i>	
<ul style="list-style-type: none"> <li>– Collaboration between different local actors is a key part of site management</li> <li>– Associations act as result accelerators</li> </ul>	<ul style="list-style-type: none"> <li>– Collaboration is not uniformly effective on all committees</li> </ul>
<i>The role of sustainability in management policies</i>	
<ul style="list-style-type: none"> <li>– Great attention given to environmental sustainability</li> <li>– There is an awareness, albeit not widespread, of the interrelationship between the four pillars of sustainable development</li> </ul>	<ul style="list-style-type: none"> <li>– Less attention given to economic, social and cultural sustainability</li> </ul>

Tab. 4. Main results summarised in terms of light and shade

6. Discussion

Burgundy is a region where cultural heritage, milieu and the wine sector are closely intertwined. Despite a certain degree of scepticism, the research revealed widespread awareness of this link among stakeholders and producers. The role of cultural heritage is fundamental to defining the identity of *Vins de Bourgogne* and the brand image of this product, and it is interesting to highlight the decision to work on image at a regional level. This awareness is transformed into investment in the protection and enhancement of the local cultural heritage, which in turn continues to increase the image of the product and, consequently, of the destination. A virtuous cycle of benefits is thus created. From a managerial point of view, product enhancement at the sector level seems to be a convincing strategy, as it achieves international resonance and creates benefits even for companies lacking the resources to implement such far-reaching strategies.

In this context, inclusion on the UNESCO WHL has brought Burgundy and its wines into the spotlight, and this has had a strong impact on the internationally perceived value of the destination and its products (Fig. 4.). This advantage, however, brings with it several drawbacks, including a lack of resources on the part of wine producers for supporting wine tourism activities, the difficulty in combining tourism and wine activities, but also the unpreparedness of the accommodation system for welcoming large numbers of tourists to the area (Fig. 5). Therefore, the idea of focusing on quality rather than quantity also seems to be functional to the resources and possibilities of the place and the entrepreneurs. Again, it will be necessary to implement further policies and strategies since, at present, tourism creates managerial problems both at the level of the individual winery and at the hospitality level.

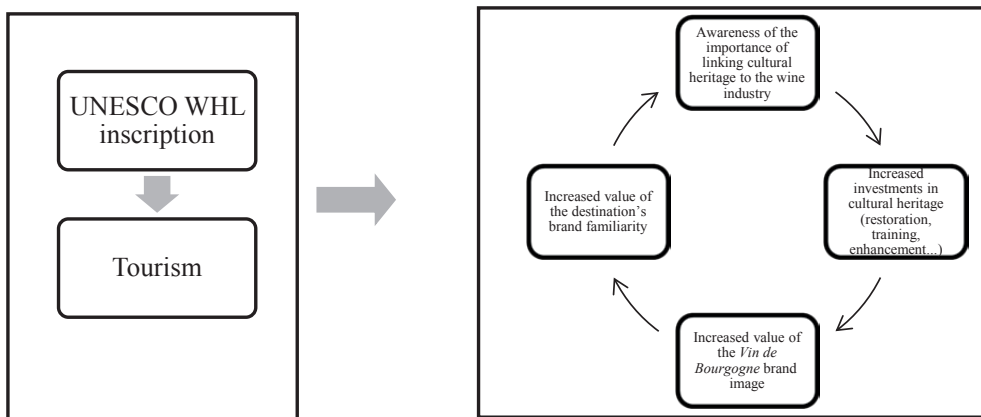


Fig. 4. Schematic summary of the positive impacts of WHL inscription on tourism, the wine sector and the territory

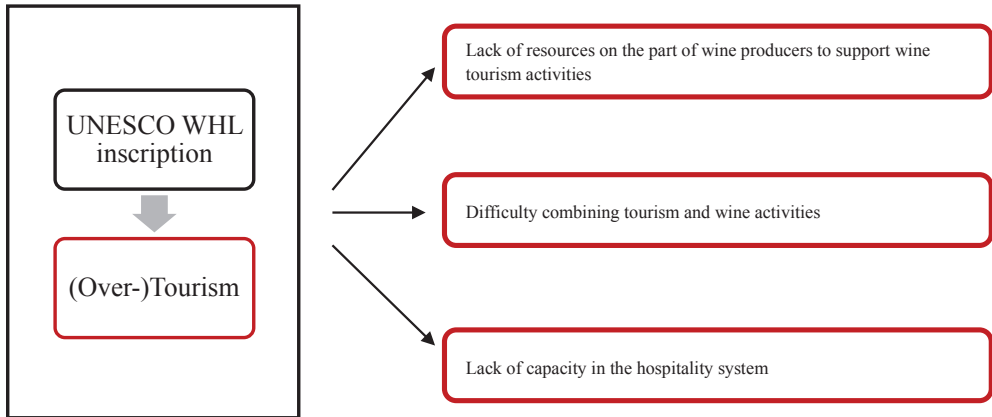


Fig. 5. Drawbacks of WHL inscription on tourism, the wine sector and the territory

In addition to the effects on tourism, it is also important to note the effects UNESCO recognition has had on the wine sector. Inclusion on the WHL has been crucial because it has refocused attention on the cultural and social importance of the *climats* system and protected the region's unique production system. Paradoxically, it has also had the opposite effect, as this new-found status has attracted the attention of foreign investors. By buying up and running the region's vineyards, they are in danger of altering the *climats* and causing the system to lose part of its identity, which is closely tied to the fact that the region's families have handed down knowledge and working methods through the generations. Another concern is the risk of crystallisation of the wine sector and, thus, an imbalance between protection and innovation. Since this is also a UNESCO site, its cultural value is certainly paramount, so protecting these aspects will be crucial. Policies to support family business or to regulate the sale of land could be initiated with this in mind. This would help safeguard the authenticity of the *climats*.

Collective organisations have played a key role in this process of protecting and enhancing the site, and also the product. They have acted as an accelerator for dialogue and collaboration between actors who previously worked alone and were sometimes motivated by parochialism. In general, inclusion on the UNESCO WHL has refocused attention on the *climats* as a mosaic, as a whole composed of many parts, and made them start working as a single body.

Finally, the issue of sustainability and sustainable development is central to the wine sector. The interviews show that social, economic and cultural sustainability remains in the background and is mostly underestimated by the interviewees. Nevertheless, there is a strong awareness of the importance of environmental sustainability. Climate change is considered the main problem, as it negatively affects wine production. Indeed, production is already suffering in terms of volume and, as the climate worsens, the issue of the availability of

wine could increase significantly. These changes could negatively affect sales and services related to wine tourism, such as the availability of wine for cellar tastings or onsite sales. This would jeopardise a sector that is fundamental to the economy and image of the Burgundy region. Moreover, the four pillars of sustainability – environmental, economic, social and cultural – are heavily interdependent and will determine the very survival of the site. Indeed, for future generations to enjoy the *Climats* of Burgundy, it is necessary to maintain an economic system of small villages that supports the social fabric that is an integral part of the area's wine culture and the *climats* system. Therefore, in a system where environment, culture, economy and society are closely interrelated, it is necessary to implement practices that consider all the pillars, in order to ensure sustainability customs and sustainable development for the territory.

## 7. Conclusions

Cultural heritage and place are fundamental elements in the wine sector. However, scientific research has not yet investigated their role in marketing strategies<sup>113</sup>. In view of this, this research aimed to reflect on cultural heritage and milieu, two concepts that are difficult to define, have evolved over time and have a number of traits in common. From a business point of view, cultural heritage and milieu are important resources because, being difficult to imitate in other contexts, they are an expression of identity and contribute to market differentiation. In the current market context, marked by the pursuit of the authentic, the local, the genuine, the artisanal and the traditional, companies should therefore look upon these aspects as useful components of a competitive advantage.

Starting with this premise, the paper investigated the relationship between the wine sector, milieu and cultural heritage, in order to understand the dynamics of the relationship, the light and shade, and the role it plays in marketing and tourism in the sector. The research considered the case study of the wine sector in Burgundy, as wine is considered a cultural product<sup>114</sup> and an essential element of cultural identity. In 2015, the *Climat du Vignoble de Bourgogne* area of this well-known French winegrowing region, with its mix of wine, territory and culture, was admitted to the UNESCO WHL. The analysis of this case focused on specific aspects, including the relationship between cultural heritage, the wine industry and marketing strategies; the effects of the UNES-

<sup>113</sup> Urde *et al.* 2007; Montemaggi, Severino 2007; Balmer 2011; Burghausen, Balmer 2014; Burghausen, Balmer 2015; Balmer 2017; Napolitano *et al.* 2018; Balmer, Burghausen 2019; Garofano *et al.* 2020; Riviezzo *et al.* 2021; Pecot, Merchant 2022.

<sup>114</sup> Ana 2023.



CO declaration on the tourism sector; the effects of the UNESCO declaration on the performance and success of wineries; the role of collaborations between different local actors; the role of sustainability in management policies.

During a 6-month stay in the Dijon area involving interviews with key local actors, several reflections emerged regarding the relationship between wine, cultural heritage and milieu, leading to considerations and possible managerial implications. In particular, it was seen that stakeholders and producers have a strong awareness of the link between cultural heritage, milieu and the wine industry. Indeed, in the wine sector, brand image increases in value, thanks to the enhancement of cultural heritage and milieu, both of which are considered identity-defining factors for the *Vin de Bourgogne* brand. This awareness leads to increased investment in the protection and enhancement of cultural heritage, which further increases the value of the heritage itself. Albeit with criticalities, a virtuous cycle is thus triggered in which cultural heritage and the wine sector benefit mutually from the relationship. All this also creates outcomes for the territory, especially through tourism. Collaboration between the various actors operating in the territory is believed to be an essential factor that can make this cycle truly virtuous.

From a theoretical point of view, the research shows that local cultural heritage and milieu play a significant role in the competitiveness of “Made in” companies and places. On the one hand, companies can strengthen their identification with a specific milieu in their communication activities, by positioning themselves in the medium-to-high segments of the market that are seeking high-quality products. On the other, places can gradually become tourist destinations, offering visitors hospitality and a value proposition that are perceived as unique and authentic. UNESCO WH status is an effective accelerator of these processes, which also increases the value of the brand image of places and products. Moreover, it has a positive impact on conservation, enhancement and, in this specific case, on the re-legitimation of the heritage site. UNESCO recognition can also lead to a risk of over-tourism and a misalignment between visitors’ expectations and the sense of identity of local producers and residents, causing environmental and social unsustainability.

From a managerial point of view, Burgundy is an interesting case because the connection between the production sector, cultural heritage and milieu has been enhanced, creating a system in which the wine sector creates value for itself (brand image), for cultural heritage (protection and enhancement) and for the territory (thanks mainly to tourism development). What emerges is that this potentially advantageous system needs to be accompanied by the active collaboration of all those involved and by the training of food and wine, and hospitality operators in order to create human capital that can generate value for the territory. The sector faces many challenges, first among them, environmental sustainability, but it must also handle economic, social and cultural sustainability, which are fundamental for the survival of the product



and its related heritage. The impact these activities have on tourism must also be assessed, as it is necessary to have infrastructures that meet the territory's needs. Protection and enhancement of cultural heritage and milieu must play an important role in these challenges, since they are fundamental to the product itself and are useful assets for a more sustainable development.

In conclusion, the research analysed the role of cultural heritage and milieu within the wine sector. Further research could analyse specific actions in order to improve this relationship. One limitation of the research is that it is based on a single case study. For a complete overview of the sector, further case studies could be considered, including longitudinal analyses. Finally, the reflections that emerged can be applied to other industries, particularly those with strong ties to place of production, such as all "Made in" sectors.

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Department of Education, Cultural Heritage and Tourism  
University of Macerata

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