Branding the Douro territory: wine labels – a missing dialogue

Maria Ferrand
Abstract

This thesis argues that the design of wine labels is a crucial aspect of contemporary wine communication, in particular for niche wines operating in the global market. The thesis focuses on dry wines of the Douro Demarcated Region (DDR) and on contemporary design practice; it aims to fill a gap in the existing literature by bridging the worlds of design and winemaking. Central to the discourse is the argument that territorial branding should be used as a key concept in the visual communication of Douro’s dry wines. At the core of the research is the argument that a strategy built upon this concept could be shared by different stakeholders within the DDR and would provide an advantage for the broader wine craft in terms of long-term benefits and sustainability.

The theories of embeddedness (Polanyi, 1945) and disjuncture (Appadurai, 1990) help to understand the phenomena affecting both the Douro wine craft and the path of Portuguese design, casting light on one of the thesis’ major findings, which is the persistent lack of dialogue between designers and the Douro stakeholders. Moreover, the two theories strengthen the study’s proposition on territorial branding by establishing links with valuable concepts and constructs, e.g. terroir, place of origin and visual identity. A parallel is also drawn between the two theories, social design (Margolin, 2002; Fuad-Luke, 2009), and wicked problems (Buchanan, 1992). As such, embeddedness and disjuncture constitute the theoretical framework of the study and help to define its holistic, pragmatic approach. The thesis has employed a qualitative, interpretive methodology centred on the analysis and discussion of purposive case studies. The ‘designerly’ knowledge, as it was coined by Nigel Cross (1982, 2001, 2006), has been a major influence of the thesis’ methodology.

The study’s key findings suggest that design is a cost-effective resource within the DDR, yet it is under-explored and under-used. In particular, the research has identified the following problems: the persistence of homogenised branding strategies and visual clichés within the craft; a symbolic deficit expressed in the wine labels of Douro’s dry wines; and a generalised lack of awareness of the potential of communication design. Promising findings have also emerged from the investigation: the presence of an ‘excess of identity’ within the Douro wine region; the existence of exceptional examples illustrated by the case studies, demonstrating the effectiveness of specific design approaches; and the potential of territorial branding as a beneficial strategy of communication within the glocal system of the DDR.
Declaration

This thesis is submitted to the University of Edinburgh in support of my application for the degree of Doctor of Philosophy. Specific support and contributions of others are acknowledged. The thesis has been written by myself and has not been submitted in any previous application for any degree.

Signed ......................................................

[Signature]

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1 Introduction and overview

This study aims to explore the value of the visual communication of Douro wines by questioning the relationship between the winemaker/producer and the designer. Of particular concern is how territory, identity and a sense of authenticity can percolate through the visual communication of Douro wines without falling into stereotyped or dominant branding cultures, especially for the external market. The research also envisions to fill a gap in the existing literature regarding the interrelated topics of wine label design and the contemporary dry wines of the Douro.

To achieve these aims, it has been necessary to compile a body of knowledge that enabled to understand the phenomena affecting both the Douro wine craft and the path of Portuguese design, thus casting light on a perceived lack of dialogue between designers and the Douro stakeholders.

An exploration of place-related constructs was also conducted to support the central argument of the thesis on territorial branding.

Finally, five purposive case studies were analysed and discussed to explore the benefits of a more engaged professional participation of designers within this context, and to evidence the significance and the value of specific design approaches.

This research was motivated in a first instance by my personal experience and curiosity, as a communication designer, as to why the visual communication of Douro’s dry wines, especially through the visual identity displayed on their labels, lacked a symbolic connection with place of origin. A deficit, the research has evidenced, resulting both from a poor engagement of design within the field, and from the use of stereotyped design approaches to the wine’s visual identity, which are perceived to affect the value of this particular Portuguese product (Branco and Alvelos, 2009: 67). Informing the rationale behind this study is also the acknowledgement of a significant lack of related literature and research, in the field of design, either regarding the key topic of territorial branding or concerning the link of the discipline’s theory and practice with the particular environment of Douro wines. The research evolved also as a reflection of my observations on site while collecting data. At a certain point, the inquiry became clearly bidirectional, as it focused mainly on the institutional perspective (observed at the IVDP, The Douro and Port Wines Institute) and the producer perspective (observed in the case studies), suggesting that the communication between Douro’s stakeholders and designers was crucial.

Building on from the ideas outlined above, the study proposes that a strategy of visual communication for the Douro wines ought to be informed upon the key concept of territorial branding. The inquiry seeks to demonstrate that this tactic could act as a solid response to the various challenges and constraints emerging from within the Douro wine craft today. Furthermore, the strategy could be applied distinctly and be shared by different stakeholders whilst preserving a robust connection with the place of origin, which is here understood as Douro’s most valuable and consistent resource. Therefore, this link with the wine’s provenance would provide an advantage for the broader wine craft in terms of long-term benefits and sustainability.
Drawing from this knowledge and throughout the research, two central arguments were developed:

1) The wine labels’ potential for communicating the tangible and intangible characteristics of wines through visual design;
2) The questioning of territorial branding as an added-value strategy for the visual communication of Douro wines.

Douro’s dry wines are a primary product of the Douro Demarcated Region (DDR) in northern Portugal. Douro farmers and wine producers are currently facing low economical profits and unsustainable strain caused by different factors. These factors are detailed in chapter 2.2 and can be summarised as follows: the harsh conditions of the local climate, topography and soil, which include frequent drought; the low yields of local vineyards, added by annual restrictions imposed on stock and sales by the craft’s regulative body; the high costs of production, due to the sloped landscape and the low mechanisation; the existence of a dual system within the DDR (for fortified and for dry wines), characterised by local imbalance and fluctuations; an ageing population, with significant impact on a system of small/family farming and an increasing labour shortage in the region; the international market’s competitiveness, as well as the rapid changes in global wine consumption; the very low prices of the region’s wines. These circumstances, amongst other, are likely to affect the DDR’s sustainability in the long term (Barreto, 2014: 261-262; Quaternaire, 2015:16-17; Symington, 2017).

Clearly, design cannot address most of the factors mentioned above. However, this thesis argues that design can play a critical role in enhancing the value of Douro wines. By employing a robust branding strategy, wine label design may elevate the wines from their material, palpable qualities, to their intangible, symbolic characters. Thus wine labels can help the Douro wines improve their visual identity, add value to what they are able to offer, and face the challenges of a highly demanding market by escaping the limiting circumstances of competing on materiality and price.

Wine labels were chosen as the focus of the study because they provide clear evidence of the added-value that can be generated by design. Beyond their primary function as branding and informational displays, created for marketing and sales, they are powerful communication objects endowed with aesthetic and symbolic value. In this sense, wine labels are also projected as demonstration artefacts that extend their commercial purpose in two different ways: first, as communication devices that transmit the identity and cultural heritage of Douro wines; second, by contributing to a logic of cultural sustainability (Appadurai, 2013: 258; Branco, Alvelos, 2009: 69; Fuad-Luke, 2009: 85; Keers, 2014: 90).

The study aims at bridging the worlds of design and winemaking by opening a new debate within the DDR. Within this debate, which is framed in the field of communication design, the central question is raised as to why territorial branding should be considered a core strategy for Douro DOC wines’ visual communication. The particular involvement of key stakeholders in this proposition is also questioned (Fuad-Luke, 2009: 147; Margolin and Margolin, 2002: 27).
The notion of territorial branding is informed by the fundamental concepts of *terroir* and place of origin (Charters, 2011: 4; Rocchi and Gabbai, 2013: 292). The latter two, in turn, emerge as central topics in the knowledge base literature on winemaking in the Douro and in the theoretical framework of the thesis, supporting a more robust hypothesis on added-value linked with place of origin. Furthermore, the dissertation evidences that a design strategy framed within territorial branding can be used by different stakeholders with an advantage for the broader wine craft, in the view of long-term benefits, while at the same time responding to the particularities of specific settings or the individual owners’ interests.

The vulnerabilities and contradictions within the Douro wine craft are the main problems explored in this research, particularly issues relating to the construction of the wine’s identity, and the professional participation of designers within the field.

After nearly three centuries devoted to port making, winemakers from the Douro valley are discovering the potential and uniqueness of the region’s unfortified wines – a phenomenon developed in the last three decades and otherwise known as ‘the Douro revolution’ (Amaral, 2014). Yet as the craft is changing and the quality of Douro wines is steadily acclaimed (Johnson and Robinson, 2009: 172; Mayson, 2013: 246; Rebelo and Caldas, 2013: 35), the region is struggling in different aspects: physically, due to the geographical and environmental conditions; socially, due to the gradual abandon of small farming and ageing of local grape growers; institutionally, due to the intricate demands of the appellation system; and financially, due to the strain put on local winemakers low profits and high competitiveness in national and international markets. As a result of the wine territory’s unique, fragile, intricate and interdependent circumstances – characterised by low yields and a costly production –, as well as the fast and unpredictable changes within the global wine trade, the conditions of producing and branding wine in this region are at the same time exceptional, promising and challenging (Barreto, 2014: 276-277; Pereira, 2014; Symington, 2014).

Social scientist António Barreto (2014: 90) describes the history of ‘wine country’ Douro as a constant alternation of two states: unity, under the close dependency of governmental supervision; and diversity, resulting from subordination and influence of external factors. Historian Gaspar Martins Pereira whom, as Barreto, has dedicated an important part of his academic work and professional life to the Douro, identifies two opposing conditions, both originating in the region’s high dependence on viticulture: underdevelopment and progress (Pereira, 2014). The scholars’ in-depth knowledge of the territory will be explored further in the literature review: through a detailed account of the identity and heritage of Douro wines, Chapter 2 will report how the fortified wines’ trade which was established in the seventeenth century has since shaped the craft, and become economically and symbolically very important to Portugal (Barreto, 2014: 131-134).

However, what is most relevant in the analysis and sharp portrayals of both Pereira and Barreto is the acknowledgement of the Douro as a land of contradictory circumstances. The latter are not always favourable towards wine production which, ironically, represents the region’s biggest income. Pereira
and Barreto depict an otherwise amalgamated scenario, constructed over the years from a number of additional contrasts: the natural and the man-made landscape; tradition and innovation; humbleness and opulence; rurality and urbanity; nationalistic and cross-cultural flows, amongst others. Pereira (2006: 19, 104) does not exclude the region’s geographical oppositions as evident variations within the territory: mountain and riverside; North Bank and South Bank; granite and schist-based topography; climate shifts along the different subregions as well as weather extremes within seasons.

In addition to this socio-cultural and physical melting pot, dominant economical views of the global wine trade have gradually permeated through the Douro wine craft, especially after Portugal’s democratic transition in the mid 1970s: Old World vs. New World stereotypes (terroir wines and varietal wines); fortified vs. unfortified wines (markets with different dynamics, both representative of the Douro); artisanal vs. industrial production (critical due to the constraints of viticulture, landscape and regulations); niche vs. commercial wines (focused on quality or quantity). Dominant ‘trends’ which, according to experts in the field, are often at the origin of classic divides and major changes in the wine world (Charters, 2006: 124-127; Robinson, 2006: 493).

Besides the contradictory conditions exposed by other researchers, an additional opposition within the Douro wine craft is highlighted, which has set important directions in the thesis’ methodology: it is the paradox of being rooted and being open, which stems from the challenges posed by a strong link with place of origin (the local) and the need to respond to free trade (the global) (Barham, 2003: 127).

Of all the dilemmas already mentioned, the local-global issue affects the work of design more directly, particularly in visual communication and in branding processes. Yet the question of what to communicate in Douro’s dry wines, i.e., what the product’s identity should build on, responding both to the market pressures as well as to the region’s circumstances, constraints and vinicultural heritage, has been first raised in the fields of oenology and winemaking (Amaral, 2014; Barham, 2003: 129; Johnson and Robinson, 2009: 172). Thus it seemed appropriate to draw a design perspective from fields that connect more specifically with the wines. This perspective therefore proposes a form of ‘socially active design’ as a constructive change of paradigm: Detailed in the methodology chapter, it is an approach that builds on real-life processes, existing resources and the involvement of decisive actors; a combination of elements which resonates key literature on social design and design for sustainability (Fuad-Luke, 2009; Julier, 2008; Manzini, 1996; Margolin and Margolin, 2002).

To explore these two complementary dimensions of design considering the thesis’ context, particularly the local-global paradox described above, a deepened and comprehensive understanding of the Douro wines environment was necessary in the first place, which has been examined within the theory of embeddedness articulated by sociologist Karl Polanyi (1944-57). This early inquiry was supported by knowledge base literature on the region’s history and on winemaking, as well as by data collected from fieldwork. The study has analysed state-of-the-art branding strategies resulting from the market’s pressures and influencing flows towards the craft in the light of the theory of disjuncture, devised by anthropologist Arjun Appadurai (1990). Thus the two theories constitute the foundation of this thesis’
methodological approach, which stresses the importance of departing from a holistic understanding of the wine craft environment, as well as its influencing circumstances. Furthermore, it highlights the need for dialogue and collaboration between designers and Douro’s stakeholders.

While working on the main arguments of the thesis as well as the design processes informing the case studies, I realised from the outset that they could not be separated from the appellation system which controls, regulates and protects the production of Douro wines. The Douro appellation is therefore central to the research. Appellation, also referred to as demarcation, is the name of a specific geographical location or place of origin which identifies the provenance of the grapes grown for a wine. It is the standard system for differentiating wine throughout the world, against which all other systems are determined. As forms of intellectual property, appellations and their legal and protective frameworks may differ from country to country and can also take account of local circumstances (Charters, 2008: 100; Appendix B). Although they are founded on the basic principles of economic protectionism and geographic origin, appellations can also be defined as a means of tackling identity and reputation. In this sense, appellations are underpinned by the philosophical and viticultural idea of terroir (Charters, 2008: 96-98, 105; Trubek, 2008: 18-31), a central concept in the thesis which, in turn, informs the key notion of territorial branding (Charters, 2011: 4; Rocchi and Gabbai, 2013: 292). The concept of terroir will be further explored in section 2.5.

Appellations were first devised in Hungary (Tokaji, 1700), Italy (Chianti, 1716) and Portugal (Douro, 1756), but the contemporary conception of the system has spread throughout western Europe mostly under the influence of France (Charters, 2008: 96-105). European wine appellations, including the Douro, contrast with liberal economic systems based on individual ownership and on a concept of terroir grounded solely on physical/natural elements. This is for example the case of the American wine industry, managed under the logic of individual or corporate trademarks which can be exchanged or moved around (anywhere in the world) without losing their core value (Barham, 2003: 128-129; Trubek, 2008: 231-232). This contrast, as well as the influence of one system on the other, is of great significance to wine brands and consequently to their visual identity (Charters, 2011: 3).

The Douro appellation system, technically defined as Denominação de Origem Controlada (DOC), is currently operated by the Institute of Douro and Port Wines (IVDP): a joint of public and private interests incorporating representatives of the production and the trade, as well as the Portuguese state. The IVDP controls the quantity and quality of the appellation’s wines by regulating the production and by certifying both the product and the labels upon a strict quality-control process. The institute is the body that holds intellectual property of the ‘Douro’ and ‘Port’ words as well as many other designations of wines within the DDR, acting alongside the Portuguese state and the European Union to restrict the use of these words outside the demarcated region (IVDP, 2016b; Mayson, 2013: 280). This means producers and winemakers settled in the Douro are not obliged to use the designations, but if they do, then they must conform to IVDP’s regulations. The IVDP’s guidelines affect design work mainly through the

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following two dictates: first, the obligation of trading only bottled and labelled wine from within the appellation (and, conversely, the prohibition of selling wine in bulk); second, the fact that all Port and Douro wine producers have to submit their wine label designs to the IVDP before seals of origin are granted to the wines in question. In this case, they have to conform with specific constraints regarding the use of visual symbols, images and text, the (typographical) notation of the word ‘Douro’, as well as that of other wine designations within the DDR (Appendix B).

As described formerly, the IVDP operates as the trustee of the Douro demarcated region. According to the institute’s mission statement, it holds information of the entire production and trade structure, including national sales and exportation; it regulates, controls and supervises the production and marketing of the region’s wines; it carries out the monitoring, promotion and defense of the DDR’s denominations of origin and geographical indications; it supervises and sanctions the application of regulations from the soil to the bottle.

The rules that monitor the design and approval of wine labels have a significant impact on the construction of the wines’ visual identity. They combine formal (tangible) restrictions such as metric and typographic indications, but also intangible constraints ‘inherited’ from successive past regulations and susceptible of diverse as well as subjective interpretation (Appendix B).

The detailed process of wine label approval concerns the following aspects of design work:

– Mandatory designations and information;

– Size and positioning of mandatory designations and information on the label;

– Proportions of brand names (producer’s name, wine name) and DDR designations in relation with each other;

– Mandatory apposition of IVDP’s warranty seal;

– Prohibited use of words, symbols and images seen as potentially harmful towards the prestige of the DDR.

What can be inferred from the management of these regulations is that even though the IVDP cannot interfere in the creation of wine brands (and subsequently in wine label design), through the existent regulatory system it may constrain or sanction the designs that are submitted for approval, indirectly influencing the construction of the state-of-the-art branding strategies. At the same time, the leverage potential of the wine label – a legally required artefact – is validated by the principles behind the appellation. Alluding to these principles, researchers from different fields have argued that the involvement of state institutions in wine production (through appellations) may transcend a purely economic or supervisory interest, taking further account of social and cultural factors as a way of building an identity (Barham, 2003: 131-132; Charters, 2008: 2010: 5-6; Trubek, 2008: 51-53). As the inquiry progressed, the influence and effectiveness of these ‘other’ concerns within the Douro appellation...
became apparent. The directives were first understood as the sum of packaging regulations (national, EU, and international) and mostly technical rules (which are common constraints within design work). Further research enabled to acknowledge the appellation system as a complex, metaphysical environment with deep implications in the wine craft. The IVDP constrains the creation of the product’s identity, and it does so building on intellectual property and on a definition of ‘terroir’ that transcends physical matter. Therefore, the implications with the design work ought to be discussed.

Two of the main principles of appellations are the sense of protection and preservation (IVDP, 2016b; Trubek, 2008: 24), which are tied to sustainability. As explained by rural sociologist Elizabeth Barham (2003: 136) as well as food anthropologist Amy Trubek (2008: 209), when discussing issues of sustainability within appellation systems, we should think beyond the ecological understanding of the term. What the two authors suggest is that an environmental definition of sustainability (Fuad-Luke, 2009: 23) should be extended to forms of cultural and historical sustainability. By this they mean the interactions that are linked with people’s ‘savoir faire’ and the construction of a shared identity, because most often they constitute the grounds for the regulatory entities’ scope and activity, as is the case of the IVDP in the Douro. In their analysis of appellation systems, both Barham and Trubek focus on agro-food products – particularly on wine – and the people that are more directly involved in the making (i.e. grape growers, winemakers and producers), to emphasise the persistence of ‘traditional’ interactions as social and cultural dimensions of sustainability. Although designers or other stakeholders are not specifically mentioned, the authors admit that there might be benefits in the increasing engagement of different actors in these contexts. A phenomenon – they observe – that is already in course. Recognising how this view fits the aims of the thesis, cultural sustainability is advanced both as the backbone of the social design approach and the branding strategy, here advocated. In this sense, it is meant to drive the thesis’ proposition in regard with brand identity, visual communication and label design, which are perceived to affect the wine’s value.

Drawing from the former reasoning, an emphasis on cultural sustainability establishes the boundaries of the research. Far from disregarding environmental or ecological sustainability, this path will have two main implications in the dissertation: First, it argues on the definition of wine labels as demonstration artefacts (i.e. in the case studies), setting the hypothesis of a collective and more cohesive communication for Douro’s dry wines. Second, it requires a particular ethical commitment of both designers and key stakeholders within the craft – one which might counter state-of-the-art approaches.

In what concerns the design perspective, both the concept of cultural sustainability and its implications resonate the reflections of Arjun Appadurai on the future of artefacts that should pertain to what he terms ‘the age of designer humanity’ (2013: 263); in his essay The social life of design, the anthropologist discusses a tendency of design and designers to neglect the importance of contexts, and to concentrate on ‘virtuoso’, isolated objects. In a critique of this bias in professional and in academic orientation, Appadurai argues that cultural sustainability should be part of the design agenda, as a
counterpoint to the material and aesthetic concerns prioritised by designers over the last two decades (2013: 259, 264).

In sum, the consideration of the Douro appellation system has set a number of important directions and methodological choices in the research. The first one addresses the study’s theoretical underpinning: acknowledging the ‘embedded’ role of stakeholders within the appellation and recognising how their interests may be affected by the thesis’ assertions, it justifies their involvement as key participants in a proposition of dialogue or change. The second one draws from the constraints imposed to design and designers within the appellation networks, reinforcing the usefulness of a collaborative framework in the development of Douro wines’ visual identity. The third one is anchored to the concepts of terroir and place of origin (both central in appellation systems), establishing a symbolic connection between these concepts and the construction of identity, which helped defining the principles of the design approach. Finally, the importance of tackling the local-global issue which, in what concerns design and designers, intersect the appellation system in branding constructs. In this regard, Trubek (2008: 231-232) argues that to understand some of the craft’s views on branding as well as the coexistence of diverse and often contradictory branding approaches, it may be useful to explore the mutual influence of appellation and liberal systems, as well how they are impacted by global flows. This exploration will be conducted in the light of Appadurai’s framework of disjuncture, explained in Chapter 2.

Given the harsh social, environmental/natural and physical conditions of the Douro (mostly tangible constraints), combined with the regulatory system of the DDR, it is very difficult to extract profit directly from wine production, and this is more evident in comparison with other regions in the country and in the world that compete with Douro wines in the global market (IVV, 2016; Robinson, 2015; Symington, 2017). This problematic has fed a recurrent discussion between stakeholders on the need to tackle the inequities and contrasts within the DDR (Symington, 2014; 2017). Over the last decades, initiatives in research and viticulture have attempted to deal with and surpass such constraints, in the view of the craft’s sustainability, but these actions are costly, take time and often develop in the closed worlds of academia and research institutions, being hardly accessible to small producers, compatible with the pace of the trade or perceived by wine consumers. Such efforts in research and development (R&D) are mentioned by scholars Barreto and Pereira in the literature review, some are made public by the IVDP on the institute’s website (2017), others have become known in reference literature as the research progressed (Goode, 2011: 95-96). However, what the public discussion as well as the historical, sociological, scientific and institutional accounts have in common, is that they seldom mention design as a resource from within the field. This observation, which is significant to define the study’s contribution, is detailed in the literature review.

Design is nonetheless both a significant resource and a means that has the potential of enhancing the product’s value based on intangible aspects (which are largely unaffected by the adverse conditions stressed above), with costs and agency that are usually more accessible than those of R&D. In the
propositional document of the CIDES.PT project – an Interpretation Centre for Portuguese Design –, the benefits of using design comparing to other resources are explicited (Dilnot and Margolin, 2015).

Many Douro wine producers already assign design costs to their branding processes or to the manufacture of wine labels, mostly due to the legal obligations of selling bottled wine and of submitting the wine labels to the approval of the IVDP. Design intervention can and is being conducted in many ways, as exemplified in Chapter 4, but what is here suggested is that this practice is scattered and affects the construction of a shared identity, therefore it should be the subject of an open debate between designers and the Douro stakeholders. This debate, the study proposes, ought to encompass an ethical reflection in respect with the region’s identity, diversity and genuineness, serving as the backdrop of a sustainable approach – one that is favourable towards the Douro DOC wine’s craft in the view of collective goals, long-term benefits and the local-global context (Appadurai, 2013: 266). In this sense, the contributions of design can be seen as an extension of the broader discussion proposed by Elizabeth Barham (2003: 137) within current embedded systems, which the sociologist unfolds in multifaceted debates: the opportunity to examine new forms of local-global connections in the making; the suggestion of positive alternatives to the industrialisation of agro-food systems; the debate on issues of symbolism and meaning tied to labels of origin; the clarification of who will subsequently benefit.

The complex scenario of the Douro wine region is already demanding towards the engagement of designers within the craft – usually materialised in visual identity, the design of wine labels and packaging –, because it requires responses to a number of conflicting constraints determined simultaneously by the different stakeholders, i.e. the winemakers/producers and the IVDP. This work is usually conducted within a ‘traditional’ design approach, which different authors define as the activity more concerned with the formal outcome of a given proposal (Appadurai, 2013: 259, 264; Jones, 1992: 4), or the functional and aesthetic production of an object. In the specific field of communication design, scholar Jorge Frascara sums up the ‘traditional’ approach as an activity involving the interpretation, organisation and presentation of visual communications, often produced through industrial means (Frascara, 2004: 3, 189).

But what ended up determining this study’s umbrella approach was found beyond Douro’s contextual complexities and the tasks that routinely inform the ‘traditional’ design process. While collecting data both from winemaking companies and from the IVDP – two key stakeholders –, the tensions involving the design and production of wine labels were recurrent and bidirectional, regarding not only the winemakers towards the IVDP’s regulatory procedures but also the IVDP towards the winemakers’ demands and experiments. Furthermore, a mix of suspicion and unawareness concerning designers and their work was perceived, originating from winemakers and the IVDP alike. At the centre of these tensions lay most often the branding/design constructs of wine labels and the restrictions imposed by the appellation’s regulations.
The main research problem became apparent: a lack of communication between the different actors, which the inquiry reveals also extends to the separate fields of design and winemaking. Therefore, to tackle the missing dialogue, a specific tactic was required. One which involved the same culture and knowledge of design’s practical discipline, as identified above, yet aimed more at initiating and mediating a discussion. The choice of addressing the dry wines’ craft having been introduced, it was perceived that narrowing the focus of the debate might be more productive. Therefore, the discussion was centred around a particular theme (territorial branding), a specific design artefact (the wine label), and an objective that ought to be achieved (added value). The study proposes that the three topics converge in the view of the wine craft’s sustainable development (cultural sustainability).

Cultural anthropologist Arjun Appadurai (2013: 266), whose theory and thinking inform this study’s theoretical framework, draws an essential link between this type of design approaches and sustainability, challenging the scope of ‘traditional’ design processes. He suggests that design and planning ought to be a joint activity, allowing both social and environmental conscience permeate through the designer’s work.

Drawing on Broadbent (2003), scholar Alastair Fuad-Luke (2009: 147) alludes to the benefits involved in the process of mutual learning produced by joint approaches, of which I highlight the ones that might resonate with the particular environment of Douro wines, and that will be sought through the study’s methodology: considering bidirectional approaches; acknowledging existing processes; being useful for complex systems or problems; being situation-driven; resisting homogenous outcomes; aiming at pluralistic solutions; being assimilated by the system.

To frame my stance as a designer concerning the problems raised by the research, I argue in this thesis why visual communication design and designers should be in a position to respond to the task of proposing and mediating a debate involving the Douro stakeholders. If problems of sustainability in wine contexts have already been signalled and tackled in other disciplinary fields such as sociology (Barham, 2003; Barreto, 2014), anthropology (Trubek, 2008), marketing (Charters, 2011) and oenology (Amaral, 2014), what could be the positive contributions offered by design? The design-led approach is therefore justified by the following issues emerging from research: first, the tensions between stakeholders prompted by design work – yet acknowledging that designers are out of the debate or its formulations; then, the importance of discussing the brand leverage potential of the wine label – a design artefact which plays a significant role in the communication of the wines’ identity and in conveying added-value (Keers, 2014: 88); finally, the need to change an established perception on the role and scope of design.

Alastair Fuad-Luke designates this type of involvement – instigated by designers – as a form of design activism (2009: 77-85) that can be nested within the framework of ‘Design Exploration’ proposed by scholar Daniel Fallman (2008: 4-18). Fallman’s model of design research activity was devised to explore the shaping of digital artefacts, but it provides a very useful understanding of the benefits and
scope of a debate initiated by design in many different contexts, including that of the Douro. ‘Design Exploration’ research, Fallman argues, differs from ‘Design Practice’ and ‘Design Studies’ in its visionary, societal and defiant approach: design exploration is a way to comment on a phenomenon by bringing forth an artefact that often in itself, without overhead explanations, becomes a statement or a contribution to an ongoing societal discussion (2008: 8).

Design exploration develops from propositions of change, from the critique of the status quo, and from revealing positive alternatives, among other actions. Fallman concludes that the artefacts proposed within this model have a ‘societal’ quality. Set in this study’s context, design exploration resonates with Appadurai’s laborious ‘production of locality’ (2013: 254) or the cultural differences between enterprising views in the wine world (Torrès, 2006: 4-5), which are central to the present discussion. The idea of the designer as a mediator or an enabler has also been championed by Nigel Cross (2001) and Ezio Manzini (2009: 451). The scholars argue that designers are particularly able to play a ‘different’ role (in comparison with the ‘traditional’ role explained previously) due to the discipline’s intellectually independent culture. Designers may not act solely as makers of tangible, isolated products but also as professionals prepared to reason over complex problems. They can bridge different players, articulate ‘systems of products’ under a shared vision, and challenge dominant flows and power structures. A discussion set in these terms ought to be informed by a previous reflection on state-of-the-art practices through the lens of design culture, which Cross coined as the ‘designerly ways of knowing’ (2001: 49-55). The latter follows a methodology drawn from Donald Schönn (1986: 27) which concerns the ‘wicked’ problematics of this study by addressing similar kinds of conflicting, ambivalent and unique situations. Such competence builds from what Cross considers to be a sound knowledge that is specific of design thinking, design acting and designers’ own understanding of artefacts. An expertise gained both from practice and the distinctive culture of the discipline.

Nevertheless, as suggested by Nigel Cross (2001: 5) and Jorge Frascara (2004: 189-190), the research approach does not disregard the useful input of other disciplinary studies, and that is why it builds methodologically on the theories of social scientist Karl Polanyi and cultural anthropologist Arjun Appadurai. Frascara acknowledges in particular how social science may inform a broader design definition towards the possibility of alternative interventions, considering that design practice often requires different levels of knowledge, discernment and interpersonal skills. He claims this whilst emphasising that contributions from the fields of psychology, sociology and anthropology may lead to better design outcomes, and namely towards a more effective communication.

This type of approach that ties the humanities and social sciences to design, resonates key work and thinking of progressive design theorists and schools who perspective these ‘expanded’ definitions of design studies and design practice as ways of both dealing with complex problems and moving towards more sustainable futures (Fuad-Luke, 2009; Heller and Vienne, 2003; Margolin and Margolin, 2002; Papanek, 2005; Sanders and Stappers, 2008). Drawing from Fallman’s framework (2008: 5-9), the wine label anchors the study both to the contexts of ‘design practice’ and ‘design exploration’, reinforcing
that the outcomes are intended at positive change in a real-life situation involving, in this case, the Douro dry wines’s craft and its stakeholders. The main implication of this choice of methodology is that the results are not aimed exclusively at the design culture of academia.

As stated in the initial paragraphs, the wine label is simultaneously the evidence and the hypothetical materialisation of branding constructs, the fundamental design artefact in this dissertation. In particular, the wine label is understood as a complex visual translation of symbolic and material values that conforms into a design artefact with multimodal components (Guichard, 2000: 367; Graddol, 1996: 74). What makes this translation process so intricate is that it is intersected by a number of complementary or conflicting influences, flows and activities: (1) local-to-global demands and constraints – such as trade regulations, different markets and worldwide competition; (2) the particularities within the territorial environment – physical, social and cultural; (3) the inputs of the different stakeholders – such as winemakers, regulators, corporations, governments, organisations, traders and consumers; (4) material, time and cost restrictions (Appadurai, 2009: 425).

Wine labels have been defined by Guichard (2000) as modest pieces of paper, yet they hold an enormous communicational and symbolic potential. Acknowledging this paradoxical definition of wine labels implies a two-way posture whose interests may not be incompatible: on the one hand, the ‘humble’ character of wine labels reminds us that wine is undoubtedly the most important thing. On the other hand, the design of wine labels is a crucial aspect of contemporary wine communication. And for (the Douro) wines operating in the global market, it is inescapable.

Restating the challenging circumstances faced by the Douro wine craft today, the thesis will attempt to present the knowledge and the groundings that support the following argument: as designers communicate both the tangible and intangible qualities of wines, their work becomes a resource of added-value beyond viticulture and oenology (Branco and Alvelos, 2009: 67; Keers, 2014: 90).

**Thesis outline**

Chapter 2 describes the contextual background of this thesis – the Douro wine craft – and opens with a summary of the winemaking and trade tradition in the Douro region. Section 2.2 highlights aspects of the historical developments that have influenced the wines’ visual communication. An overview of the current status of the region’s wine scene is also presented, and the significant findings of this section will be outlined.

The chapter will move on to discuss the path of Portuguese design while drawing the connections of the discipline and the designers’ professional practice within the Douro wine craft. This section aims to identify the crucial moments and constructs that have influenced the current public perception of design, and to cast light into the discipline's professional scope in Portugal. Furthermore, section 2.3 identifies and discusses signs of an insufficient engagement of design within the Douro wine craft. Emphasising the necessity of understanding what lays at the root of the problems that characterise both the paths of
winemaking in the Douro and of Portuguese design, the following section will deliver an overview of the key theories of embeddedness and disjuncture.

Next, the chapter compiles the basic knowledge of contextual and theoretical contexts on which to map the thesis’ argument for territorial branding, such as the central concept of terroir. This section will also explore other place-related constructs.

Section 2.6 will focus on the relevance of wine labels and discuss key findings from the existing literature and research on wine label design, specifying the particular contributions in the field that relate with the Douro wines. This final review will reinforce the idea that this topic requires both a more engaged professional participation, and further knowledge contributions from the field.

A methodology chapter follows where the philosophy, the theories and the design approaches of the study will be explained. This chapter will describe the backgrounds and the rationale for the design approaches which were defined for the study, detailing the specific methods of data collection that were used for the main argumentation. The methodology chapter will also discuss the approach to the field observations, as well as the interviews with designers, winemakers, and other informants.

Chapter 4 is dedicated to the core of the research, and presents the main research and findings concerning wine label design in the Douro. The introduction will situate the importance of the wine label as the focus of the research, outlining what is implied in both designing a wine label and situating this particular artefact within the context and operativeness of the Douro appellation system.

Exploring the possibilities of distinct developments of visual identity and design processes, the five case studies will be presented as exemplars of outstanding proposals of added-value. Furthermore, each case study will be portrayed as an illustration of the design approaches introduced in the methodology. The case studies’ discussion will provide an interpretive framework within which the design constructs at work in each project can be understood and evaluated. This will allow to examine the extent of their effectiveness at different levels as exemplary responses to the challenges and opportunities faced by the Douro wine craft today.

The following section will introduce the thesis’ main proposition. At the core of this proposition is the argument that territorial branding should be used as a key concept in the visual communication of the Douro’s dry wines. The chapter will resume the benefits of a strategy built upon this concept, and suggest ways of bridging the worlds of design and winemaking through practice and further research. The aim of this chapter is to expand the knowledge gained with the exploration of the case studies into a proposition of change within the DDR.

The conclusive chapter will resume the main topics taken up in the thesis, as well as the major threads throughout. Drawing from the findings as well as from the discussion and critical analysis produced within the study, this chapter will respond to all the aims that were laid out in the introduction. The study’s contributions to knowledge will also be presented. Although beyond the delimitations of the current inquiry, the conclusive chapter will suggest avenues for future research.
2 The knowledge base: contexts, frameworks and problematics

2.1 Introduction

This chapter presents the contexts, frameworks, concepts and problematics embodying the core of this thesis’ knowledge. As such, the following sections explore five central topics within the study:

1) The core characteristics of the Douro wine craft, its current problems and challenges;

2) The parallel path of Portuguese design, and its connections with the Douro;

3) The definition of embeddedness and disjuncture as underlying conditions within this context;

4) The importance of place-related conceptions in wine communication;

5) The role of wine labels and design within the context of Douro wines.

Organised by themes, the present review was undertaken to provide an overview of the motivations and the complexities behind this research. Assembling contributions from different academic disciplines, it attempts to identify the relevant issues which can be tackled by design intervention, specifically through the design of wine labels. The themes and concepts thus explored are by no means understood as a set of constraints or assumptions that might delimit the research. On the contrary, they are suggested as potential avenues for an open discussion which bridges the worlds of winemaking and design by focusing on the importance of wine labels, a discussion which will be taken further in Chapter 4. Drawing from this outline, the literature review unfolds as follows.

The first section will address the study’s empirical context. Both historical accounts and the recent literature on Douro wines suggest that the craft has always struggled with serious structural problems. These issues relate as much to the harsh physical and productive conditions of the territory, as they do to the fragile social fabric of the region, to an intricate framework of regulations, to the pressures set by the global market or to a local economy entirely dependent on viticulture. Otherwise, a multidisciplinary review acknowledges that the Douro is the home of a rich heritage rooted in a unique landscape and terroir, an impressive bio-genetic diversity, a cross-cultural identity, as well as one of the oldest traditions of winemaking in the world. Finally, the current literature advances that the recent emergence of Douro’s dry wines forecasts both challenges and new opportunities within the craft. In sum, this section will present the relevant knowledge base regarding the Douro wine craft, detailing significant developments as well as the problems and demands faced by the sector today.

Section 2.3 will address the path of Portuguese design, highlighting relevant connections with the Douro wine craft. The review examines first how design developed as a discipline and as a profession in
Portugal. In particular, this section explains the progression of design within the country's political and economic developments, from the dictatorship to democracy, and until the recent recessive period. By observing the path of design and the influence of the discipline throughout the industrial and the productive contexts, education and the social media, the review aims to cast some light on design’s current awareness and accreditation.

An account of the literature on wine labels and the Douro wines will explore the existent academic discussion and critique previous and contemporary contributions of design towards the Douro wine craft. Thus, the review concerns the involvement of design researchers and professionals within the DDR, as well as the institutional investment and support that has either fostered or hindered a more evolved design integration.

Finally, the purpose of this section is to understand the reasons behind the lack of dialogue between designers and the DDR stakeholders.

As a corollary of the previous two sections, section 2.4 will address the study’s theoretical underpinning. Hence, the concepts of embeddedness (Polanyi, 1945) and disjuncture (Appadurai, 1990) will be outlined as useful frames of reference for understanding what lies behind the complexities and paradoxes which characterise the Douro wine craft. In particular, these theoretical perspectives shed light on the centrality of the appellation system within this context, as well as on the influence of local-global issues in the Douro wines’ state-of-the-art branding and communication strategies. Seen through the lenses of Polanyi and Appadurai’s theories, the acknowledgement of the Douro wine craft as both an embedded and a disjunctive scenario has informed the research methodology and elicited the design approach, which will be presented in Chapter 3.

This framework also underpins the critical analysis of state-of-the-art wine labels in the Douro, and has influenced the choice of purposive case studies. Later, in the study’s proposition, embeddedness and disjuncture will reinforce the argument of territorial branding: by establishing a link with the appellation system and by securing an informed, robust communication tactic – addressing both local and global demands.

Section 2.5 outlines the key concepts of terroir, place of origin and territorial branding. The aim of this section is to acknowledge the relevance of place-related concepts by situating them within the wine craft and other disciplines, such as social science, anthropology, food studies and marketing. The ultimate purpose of the review is to understand how place-related concepts can be transposed to the sphere of design, and impact the wines’ visual identity and communication: either through research or through practice. This process, which bridges the sites of production with the sites of consumption, will be addressed in particular by exploring the strategy of territorial branding, materialised in wine labels. Territorial branding is therefore emphasised as a process of translation, supporting both the construction of a strong identity and a sustainable source of added-value.

Steve Charters’ book Wine and Society (2006) provided essential knowledge about winemaking, the culture surrounding wine consumption and the relevance of location within this craft. Moreover,
Charter’s work offers bibliographical notes and recommendations at the end of each chapter, concerning particular topics that are relevant for the present thesis. Thus the author’s suggestions have pointed towards important complementary readings: *The Concise World Atlas of Wine* (Johnson and Robinson, 2009), which provides an overview of Douro wines from within an international perspective; *Building Strong Brands* (Aaker, 1996), for basic knowledge on brand management; and Jonathan Nossiter’s film *Mondovino* (2008), which is also mentioned by Amy Trubek, for a contemporary reflection on authenticity and wine.

The final section concerns the exploration of wine labels within the perspective of design and will complement the purpose of the present chapter by highlighting specific and relevant academic production in the field.

Following an initial outline which situates wine labels as a fundamental artefact of contemporary (and historical) wine communication, the review will signal the ‘wine footprint’ of Portuguese design studies up to the present date, which sums only three major works concerning the Douro wine craft. The first one, Magda Barata’s *The Identity of Port wine through the tradition of its packaging* (2009), aims to explain how different historical, technological, regulatory, and commercial aspects of the port wine craft have been transferred into the visual identity of this product.

A second design study addressing the Douro wine craft is Helena Lobo’s doctoral thesis, *The Visual Identity and Graphic Typology of Port Wine: Wiese & Krohn* (1865–2010), published in 2014. This work is an extensive documental analysis of a body of visual ephemera belonging to one single company – Wiese & Krohn.

The third work is a result of the exhibition *Images of Port Wine: Labels and Posters*, curated by designer Francisco Providência, which was held in 2010 at the Douro Museum, in Peso da Régua, and the following year at the University of Porto. Simultaneously, an extensive illustrated catalogue was published with essays of design scholars Francisco Providência (on the visual identity of port wine), Helena Barbosa (on port wine posters) and Magda Barata (on port wine labels).

By demonstrating where the literature is lacking, the review will clarify the relevance of the present study. Later, in the conclusive chapter, the contributions to knowledge will be fully set out.

### 2.2 The Douro wine craft: identity, problems, and challenges

Although the study will focus on a recent period corresponding to the last 20 years, the present literature review will also cover key historical moments relating to the contemporary situation. The aim of this outline is not so much to convey a body of archival information, but it is intended to raise key issues that will be relevant in the chapters ahead, namely the core characteristics of the Douro wine craft which may be expressed in the identity of the region’s dry wines, as well as in their visual communication.

Drawing mostly from the works of historian Gaspar Martins Pereira (2006) and social scientist António Barreto (2014), the review will explore the idiosyncrasies of an embedded wine trade in transformation,
explaining how the winemaking tradition developed until the Douro became first a demarcated region (the DDR), and then, an appellation. Where the views of the two scholars intersect other relevant literature, namely on the specific Douro *terroir*, they will explain its multifaceted identity, and articulate with recent debates within the craft: the different sectors of fortified and unfortified wines, the influence of a regulating system, the paradoxical conditions of the territory, and, finally, the problems and challenges that undermine the DDR’s sustainability today.

The Douro is a cross-cultural environment characterised by a long tradition of viticulture and wine trading. Due to its unique cultural landscape, Douro’s oldest vineyards were integrated into UNESCO’s world heritage list in 2001 (UNESCO, 2014) (Fig. 2.1).

![Fig 2.1 The Douro Valley World Heritage area, attributed by UNESCO](image.png)

The complexities and variations within the wine craft, according to scholar Gaspar Martins Pereira, were caused by the enduring diversity of both natural and human factors. This diversity has informed the cultural syncretism of the region, influencing the early establishment of settlements, transportation, economic activities as well as the system of relationships within the territory. Based on the limited archaeological evidence, Pereira counters the assumption of the existence of primitive vine growing in the region before the Roman era (1\(^{st}\) to 4\(^{th}\) centuries a. D.). This scantiness, however, contrasts the abundance of archaeological material that reveals a steady evolution of both viticultural practice and winemaking since the Roman occupation (Fig 2.2). The cultural miscegenation during this period is demonstrated by traces of different religious cults, and continues throughout the medieval era due to successive invasions or conflicts. Pereira asserts that this has established the cross-cultural tradition in the territory, a heritage that never disrupted the local people’s aptitude for winemaking (Pereira, 2006: 104-107).
A period of economic prosperity and openness emerged in the Middle Age and continued during the 16th and 17th centuries. From the inner territory, wine was transported to the coastal city of Porto, where Douro’s first international merchants initiated a wider distribution. Shipped mostly to Belgium, France, and Britain, this wine, whose vineyards were located in the lower region of the territory, was a dry, aromatic wine made from fully matured grapes. It was the remote ancestor of contemporary DOC Douro wines (Pereira, 2006: 108). In the 17th century, there was a bifurcation within the wine craft between unfortified and fortified wines. Subsequently, the Douro has built its international reputation as a trade of (mainly) fortified wine. The review will address the significant issues emerging from this development to understand how it has influenced the construction of the Douro wines’ identity, and what impact it has had in terms of the challenging circumstances of the craft today (Johnson and Robinson, 2009: 172, 175).

The transformation of Douro’s unfortified wines into port was slow, complex and non-linear. The first mention of ‘Port wine’ was made in 1675, but the practice of adding distilled spirit to stop fermentation developed from the mid 19th century (Pereira, 2006: 108). The process of fortification was not new, and had been experimented more than a century earlier in southern Spain, to produce sherry. For wines that needed to be shipped, the resulting high-alcohol levels were an effective protection against bacterial deterioration. Furthermore, the method rendered the wines sweet, which had become an appreciated characteristic in Europe by the time the first ports emerged. This development contributed to Douro’s melting pot of Scandinavian, Dutch, French, Spanish, and British ascendency. Social and eating habits also influenced the growing preference for fortified wines amongst the European elites, thus port spread as a favourite drink. Formal meals would include soup, cheese and desserts, which were perceived to be well matched with fortified wines. In Britain, decanted port became a traditional drink in official meetings, business agreements, ceremonies or festive occasions. This has reinforced the link of port with a certain ‘upper class’ lifestyle.
Towards the 18th century, these habits and rituals of consumption established the high status of port. A status that has remained and is often reflected in the symbolic value and image of port wine until the present day, this topic will be discussed further in Chapter 4 (Charters, 2006: 28, 125-126, 202). Then, various political conflicts occurring in northern Europe by the late 17th century increased the demand for Iberian wines, in detriment of the French. The Nine Years’ War (1688-1697), the Methuen treaty signed in 1703, and the establishment of the British Factory House in Porto (1727) all played an important part in privileging the Portuguese wines in Britain. The trade of Douro wines became wealthier and entirely dependent on the British market. To suit its growing demands, the monoculture of vine took over in the territory. Concomitantly, the wines were adapted to the British taste (for sweet, fortified wines), and often adulterated with different substances, in the view of easier profit. Eventually, British merchants refused to buy counterfeit wines, which caused a crisis in the craft (Mayson, 2013: 11-12). Recognising the importance of the Douro wine trade for the country’s economy, the Portuguese government was compelled to intervene: the Companhia Geral da Agricultura das Vinhas do Alto Douro – further designated as Companhia – was established in 1756 (Fig. 2.3).

Aimed at restoring the reputation of Douro wines, the mission of the Companhia was devised by prime minister Sebastião José de Carvalho e Melo, also known as the Marquis of Pombal (Pereira, 2006: 109; Barreto, 2014: 97). Thus, the first regulated appellation in wine’s history was decreed – the Douro demarcation (Charters, 2006: 96; Johnson and Robinson, 2009: 167). This legal system included the delimitation of the territory, production control, the establishment of taxation and prices for trade, the categorisation of wines for exportation, and the prevention of frauds. The Companhia defined the boundaries of the producing territory, a much smaller area than today’s DDR, and 335 granite markers were set in place to delimit the borders of the Douro wine region (Fig. 2.4).
An inscription carved on the stone markers, *Feitoria* (Factory), signaled the best vineyards for quality wine, commonly known as *vinho fino* (fine wine), *vinho de feitoria* (factory wine), or *vinho de embarque* (shipping wine), the only type of wine allowed for exportation. On the outskirts of the demarcation, bush vines (involving no wires or other training supports) were used for inferior quality (dry) wines, made for domestic consumption, which were therefore called *vinho de ramo* (branch wine) (Pereira, 2006: 110-112). Built from an embedded winemaking tradition, i.e. inherently connected with place of origin, these early developments settled two fundamental characteristics which have impacted the Douro wines’ identity until today: a highly regulated production and trade, and the craft’s positioning according to the demands of the external market.

The establishment of the embedded trade was a successful strategy. The government’s institution, though fundamentally authoritarian, proved an effective measure to restore the confidence of foreign markets in the craft. As a result, in the beginning of the 19th century, the improvements were such that Douro wines shipped from Porto represented 80% of all Portuguese wine exports. Yet the great privileges granted to the *Companhia* through the demarcation were far from being consensual. Douro farmers, estate owners and Portuguese merchants were supportive of the governmental body, but it was highly contested by British shippers, Porto taverners and some clergy members, due to their significant loss of room for manoeuvre (Pereira, 2006: 113-114). This lack of consensus may explain why, until the 19th century, the *Companhia* was successively cropped, suspended, re-established and finally dismissed. The remains of its material legacy were converted into a private company today. The early competencies of the *Companhia* extended much beyond the wine craft. An example of the ample governance of the institution relating with this thesis’ discussion will be taken up in Chapter 4 to describe its instrumental role in the creation of the University of Porto, with the establishment of the first colleges and two drawing courses. On the second half of the 19th century, the demarcated territory was expanded. This was a necessary step, prompted by the devastation caused by the epidemics of *oidium* (1852), and *phyloxera* (1863). The rapid spread of the grape diseases forced farmers and landowners to establish themselves in the Upper-Douro, where the destruction was less aggressive. Later, the railroad built along the river...
(1873-87) facilitated this expansion, its impact still visible today: natural and cultural diversity, resulting from the aggregation of a new geographic setting; the spread of novel viticultural and winemaking practices; and the loss of biodiversity, due to the substitution of endemic vine species as well as an excessive use of pesticides (van der Laan, 2016: 33). Under the influence of liberalism, free commerce was established in 1834. Yet contrary to what was expected, the trade faced a tremendous economic crisis. A new outbreak of frauds and imitations (because the process was no longer supervised), affected the reputation of Douro wines, this time in a critical period of severe vineyard destruction. As the wine craft decayed, its social impacts were devastating throughout the 20th century. Great poverty, debts and hunger compelled many Douro farmers to sell their properties and to emigrate (Pereira, 2006: 115-118).

Once more, the crisis’ breakthrough changed the landscape of the Douro and reinforced the cross-cultural characteristics of the wine craft. New Portuguese and foreign landowners (who slowly replaced the gaps left by Douro farmers) introduced different viticultural practices along the slopes and built patamares (wide terraces) with monumental walls. These were necessary measures to fight the viticultural epidemics and to revitalise the production. Increasing demands for protective regulations led to the re-establishment of the demarcation system in 1907, which had now expanded its supervision towards the Upper-Douro. The new appellation system, however, included measures that were promptly contested: heavy taxes, the prohibition of distilling aguardente locally, and prevention of all the direct trade from within the territory. Complementary, a bonded area was created in the coastal city of Vila Nova de Gaia, the Entreponto, with the purpose of storing, ageing and exporting wines. By the end of World War I, the trade was wealthier, but the social conditions of Douro growers worsened; the profits (from exportations) and benefits (from taxes) remained with the shippers, the merchants, or with the Portuguese state (Pereira, 2006: 118-121). The reader must be reminded that at this time the craft was dominated by port wine.

The period occurring between the 1st Republic (1910) and the establishment of the new dictatorship (1926) was the most agitated in the history of the Douro due to the many social inequalities. Passionate demonstrations, riots and violent attacks were held in the name of the wine craft’s preservation. As a response, the military regime enforced a tighter governmental control. Between the 1930s and the 1940s, professional cooperatives emerged and aimed at overseeing the craft: the Farmers’ Guild and the Port Wine Shippers’ Guild. The Farmers’ Guild affiliated with Casa do Douro, a new governmental organism. The latter was granted much power within the territory: maintaining the register of vineyards, issuing licenses for fortified wine among producers, supplying grape brandy to winemakers, controlling the wine made in the demarcated region and certificating documents to the Gaia Entreponto. The activities of all three entities were coordinated by the Port Wine Institute (IVP), established in 1933 to conduct both research and promotion, and to improve the external image of the wines (Pereira, 2006: 121; Barreto, 2014: 145-147). A consequence of IVP’s activity, in 1942 the warranty seal became mandatory in certified wines. Its graphic appearance remains practically unchanged (Fig. 2.5).
A question then emerged, as to which parameters ought to define both the quality and the quantity of port wine produced. Agronomist Álvaro Moreira da Fonseca, one of the most influential personalities in the Douro, devised the benefício system, which was set in place between 1945 and 1949 (Barreto, 2014: 219-220). Each year, Casa do Douro updated the register of vineyards to determine the amount of fortified wine allowed to be produced, depending on the sales and the remaining stock of previous years. The methodology, which is still in use, is similar to the regulation systems of other (old) wine regions in Europe. Classifying vineyards from best (A) to worst (F) according to a ‘terroir quality’ criteria (soil, climate, location and viticultural practices), the system determines the prices of grapes (Pereira, 2006: 125; Johnson and Robinson, 2013: 174). Thus, complementary to the territorial demarcation, the benefício classification became a fundamental characteristic of the highly regulated Douro wine craft. However, as will be discussed in Chapter 4, it did not transpose into the design of wine labels, which remained tied to the brands’ traditions, to external influences, or to the nationalistic aesthetics of popular culture.

The second half of the 20th century signaled the revivification of Douro’s unfortified wines. At this time, the best grapes were reserved for port production; Douro’s dry wines were made either from the surplus to the benefício or from the lowest rated grapes. Part of it was also distilled to make aguardente for port. Production methods mimicked those used for port, and apart from a few exceptions, they usually resulted in a rather astringent, overripe taste, which was unsuitable for commercial wines. This accounted for their low status within the craft, a subject that will be discussed further to examine aspects of the wines’ identity.

The adaptation and modernisation of dry wines’ production was pioneered by Fernando Nicolau de Almeida (1913-1998), who had been travelling to Bordeaux to study French dry wines. When the self-taught oenologist returned to his estate in the Upper-Douro, Quinta do Vale Meão, he started experimenting temperature control and other methods, using Douro’s best quality grape varieties. As a result of his persistency and inventiveness, the iconic unfortified wine Barca-Velha (Fig. 2.6) was released in 1952 (Mayson, 2013: 244, 251; Barreto, 2014: 227).
The years that preceded and followed the Portuguese democratic revolution, in 1974, were times of profound changes in the Douro. These transformations have altered significantly both the practices within the wine craft and the physical territory. The picturesque yet tortuous labour of loading small boats to transport wine barrels downstream until Porto would come to an end when, in 1964, the road transportation was eventually authorised (and viable). Conversely, with the construction of five dams along the river, Douro’s agitated, dangerous waters were at last still. Today, the memory of old days’ transportation by boat is evoked in touristic tours along the river, as well as an entertaining competition organised by the main port companies. The latter takes place every year in June, in Porto, when the city celebrates São João, its most important holiday.

A centre for viticultural studies, the CEVD, was established in the late 1960s to investigate the possibilities of modernisation and mechanisation of Douro’s vineyards. In the late 1970s, a more liberal law enabled to trade the wines directly from the inner Douro, which many small growers saw as an opportunity to manage their own production and to create their own labels (Mayson, 2013: 66; Barreto, 2014: 149).

The 1980s were the decade of the greatest improvements in the history of the craft. Almost 80% of all wines traded internally and externally were bottled, contributing to a significant rise in prices. Probably due to a change in costumes (for example the growth of women’s consumption), as well as new culinary uses of port wine, France became the greatest external consumer of port. The territory’s viticulture was slightly modernised with viable mechanical means, and the worker’s wages improved. A large and wide-ranging program of rural development (called PDRITM) supported by the World Bank, changed the Douro slopes noticeably. Almost half of the DDRs vineyards (approximately 21,000 hectares of a total of 45,000) were replanted and redesigned to become a mix of socalcos (terraces), patamares (wide terraces), and vinha ao alto (vertical vines), an aspect that will be discussed further in Chapter 4, which relates in particular with the case study of Quinta dos Murças. When the country entered the EEC in 1985, a flood of European funding boosted the stagnant Portuguese wine industry, which also helped to reconvert the Douro vineyards. The craft’s regulations were adapted to EEC standards, including norms for labels and packaging (Johnson and Robinson, 2009: 172; Barreto, 2014: 149-150).
The prosperity experienced by the trade in the 1980s was not enough to change the structural underdevelopment of the region, though, neither to prompt a significant wealth change in local people’s lives. Once more, the benefits were mostly visible beyond the rural settings: to Porto and Vila Nova de Gaia-based companies, or to multinational corporations. According to scholars Pereira and Barreto, the inner territory has always lacked political power and a robust strategy to ensure independent, sustainable development. As a result, the directions of the craft are mainly guided by the regulative system or the dominant markets, which helped to maintain Douro’s dependency on viticulture and on the trade of port (Pereira, 2014; Barreto, 2014: 151-153, 262). Hence, when the decline in the global consumption of fortified wines hit the wine world in the 1990s, the Douro suffered the consequences. The reasons behind this downturn are complex. The main causes for the phenomenon are the emergence of countless new wines around the world (especially New World regions), and a growing preference of consumers for dry, sparkling or less alcoholic wines. Another cause may be the wine’s image, which is often perceived as a drink of older generations (Charters, 2006: 125-126; Mayson, 2013: 272; Amaral, 2014; Symington, 2017: 20).

Since the release (and success) of Barca-Velha, a number of traditional port producers started considering dry wines more seriously. The affiliation of these wines with French production methods accentuated a concern with terroir, but the use of Douro’s traditional varieties maintained an identitarian link with port. However, an expressive shift in the craft’s bifurcation that initiated more than 300 years ago has taken decades to become visible. This is probably caused by a generalised resistance towards change within the DDR, as well as the stakeholders’ commitment with port, which has shaped the whole system to suit to the fortified wines’ trade (Mayson, 2013: 243-5; van der Laan, 2016: 48).

Yet, soon after a specific designation – DOC (Denominação de Origem Controlada) – was awarded to dry wines, in 1982, the so-called ‘Douro revolution’ began. Described by sociologist António Barreto as a challenging move towards the development of a real alternative to port, this change was not incidental, but rather the consequence of convergent circumstances which occurred in the Douro over the following decades. These important aspects of resistance and change will be addressed further in the theoretical framework of the thesis as well as when examining the current and proposed strategies for the visual identity of DOC Douro wines.

The most innovative shifts within the craft occurred in the 1990s. They started with research on local viticulture, first, and then with innovations in winemaking, conducted by a new generation of talented oenologists and producers. These professionals, both native and foreign, were able to apply their savoir faire according to a cosmopolitan knowledge of winemaking, without losing a connection with the region’s heritage and tradition. Then, major and structural changes took place on the vineyards as well as in the wineries, supported by financial aid from the Portuguese government, the World Bank and the European Union (Barreto, 2014: 259-261; Johnson and Robinson, 2009: 172). With three World Heritage Sites officially recognised by UNESCO – first the city of Porto (1996), then the archaeological sites of the Côa Valley (1998) and finally the Alto Douro wine region (2001) –, the territory was also
experiencing a positive exposure in the media, which opened ways to new challenges and opportunities. The first directives on the wines’ visual presentation, combining local and EEC regulations, were issued by the IVP in 1990, and then in 1992 (Appendix B). The impact and management of these ‘presentation’ regulations within the design of wine labels will be discussed further, in Chapter 4.

In 1994, an initiative which aimed at improving the image of Portuguese wines in the external market was set in place. The Portuguese government commissioned American economist Michael Porter to examine different sectors of the Portuguese economy while analysing their growth and competitiveness potential. An enquiry dedicated to the wine cluster was produced ten years later by Porter’s consultancy firm, Monitor Group. The latter, in turn, handed this specific study to M2C (Market2Customer), a division focused on marketing and growth strategies (Monitor Group, 2004: 5-6). The analysis covered almost every aspect of the wine sector, from vine to glass, and it was presented to the public in a series of conferences in 2004.

The main issues tackled by this report were orientated towards economic growth and management, and the resulting proposals were based on a strategy of added-value. Although the work was not conducted by Porter himself, this document is still referred to in Portugal as ‘the Porter report’, therefore in the present study this designation will be adopted. The report is clearly biased towards an economic perspective and towards ‘Portuguese wines’ as a whole. Therefore, the influence of its propositions was more visible in national organisations and initiatives than, specifically, in the Douro region.

A practical consequence of this initiative, ViniPortugal (the Interprofessional Association of the Portuguese Wine Industry) entailed a collaboration with Monitor Group to define the priorities of a national wine programme (Monitor Group, 2004; ViniPortugal, 2016). Subsequently, the agency Wines of Portugal was created to promote all Portuguese wines in the external market (Fig. 2.7). While the agency’s scope of action included DOC Douro wines, fortified wines remained under the tutelage of IVP, which has focused on promotion of port and its communication strategies.

The Porter report is significant within the present dissertation because it is still one of the few studies addressing specifically the visual communication of Portuguese wines, highlighting both its weaknesses and the important role played by wine labels. A crucial finding from that particular analysis was the poor visual presentation of Portuguese wines, mentioned in the report as the craft’s ‘Achilles heel’. This perception, observed amongst U.K. and U.S. consumers, was demonstrated through focus groups’ tests conducted by M2C, which concluded that the wines’ image was often ‘too bad’ to be worth the purchase.
Visual communication was thus signalled as an area lacking considerable improvement and sophistication, especially for Portuguese wines operating in the international market (Monitor Group, 2004: 26). Considered as a key issue within the present study, this topic was first addressed through a survey of the image of Douro wines (Appendix D), which prompted the categorisation advanced in Chapter 4.1.

The Porter report is also debatable, considering both its positioning regarding design work, as well as its focus on corporate strategy. On the one hand, the report stresses the invaluable work of designers to tackle the flaws in the image of Portuguese wines. On the other, Porter’s view is biased towards homogenisation, a position critiqued within the present study. The Porter report offers general guidelines to enhance the wines’ image, suggesting that it ought to be subsumed under two contrasting archetypes: ‘Simple Classical’ for quality and tradition, and ‘Modern Elegant’ for simplicity and sophistication. It is also estimated that 3 to 5 US$ might be charged on each bottle to compensate for design investment, advancing its monetary return (Monitor Group, 2004: 27). However, the general analysis presupposes a stereotyped view of Portuguese wines, lacking the consideration of their distinctness, which originates from different regions. The use of this strategy, which is characteristic of the current visual communication of Douro wines, has been evidenced by the first survey of wine labels conducted within the research (Appendix D).

Finally, Portuguese wine producers are encouraged to assign qualified design work if they are to compete in the demanding and sophisticated British or American markets. This is where the report becomes intriguing: despite recognising the existence of competent professionals in Portugal, appendices G and H compile a contact list of both British and American design institutions and studios, completely omitting Portuguese practitioners. At the time, the Portuguese Design Centre was not consulted (Monitor Group, 2004: 71-73; Cayatte, 2014). Further impact of the Porter report within the Douro wine craft will be discussed later in the dissertation.

In 1995, the Portuguese government prohibited bulk exportation of all categories of port wines and later, in 2009, the measure was extended to Douro wines (Appendix B). This was a determinant initiative aiming to boost the potential of the value of Douro wines. The measure’s objective was to defend the wine’s prestige (preventing fraud and illicit practices) and to increase control over the product’s quality. Bottled port for exportation had already seen an increase since the early 1990s (a shift of 90% bulk and 10% bottled, to 25% bulk and 75% bottled), therefore the average price of bottled wine had become considerably higher for importers. Since a limit to port production was imposed yearly by the IVP, a number of additional changes in regulations enabled small producers to use the surplus of port wine to make dry wine at extra profit, and to manage the trade with less restrictions. Moreover, local producers could now export the wine directly from the Douro and establish their own companies and branding strategies. This has set a favourable stage for the successful development of Douro’s dry wines. Reflecting a new awareness and the responsibility of safeguarding all wines (not just port) within the territory, in 2003 the IVP became the IVDP – Instituto dos Vinhos do Douro e do Porto (Peixoto, 2011: 450, 458, 502).
As we approach the conclusion of this chapter on the history and the context of the Douro wines, it is important to highlight both the main problems and the challenges that are driving the wine craft today. Over the last two decades, a number of changes have affected the region’s wine craft that motivate the present study. First is the central matter of the remarkable growth and visibility of DOC Douro wines. Even though their weight within the Douro economy is not yet comparable to that of fortified wines, this progress has created new economic support for farmers, winegrowers and winemakers. And then, there are the persistent inequalities of the DDR, as well as an understanding that the craft is now running under a double standard (for port and for dry wines), which might threaten its sustainability in the long term (Barreto, 2014: 261-262; Symington, 2017). The evidence supporting these arguments was mostly drawn from two comprehensive reports prepared by the consulting agency Quaternaire Portugal. The first, issued in 2008, was commissioned to Quaternaire by the IVDP. An update of this report was also requested by the AEVP, the port wine companies’ association, in 2015. The two records are fully documented with recent data and statistics from the DDR and have been used by the commissioning institutions as strategic diagnoses of the Douro wine craft.

Today, the portrait of the Douro as both a productive and mercantile environment is still determined by the pre-eminence of fortified wines. The dominant organisational model within the Douro wine craft is defined by five big groups of companies. The latter are mostly dedicated to port production and trade (although not exclusively), and each group operates upon its differentiated strategy. These groups have been consolidated in new conglomerates as follows (Quaternaire, 2015:12):

- Fladgate Partnership (British)
- Gran Cruz (French)
- Sogevinus (Spanish)
- Sogrape (multinational of Portuguese origin)
- Symington Family Estates (British)

According to social scientist António Barreto, the foreign ascendency within the region seems significant, but it should be noted that contrary to newcomers, most of these ‘foreigners’ are in fact the third, fourth or fifth generation of traders who have not only established themselves, but also lived in Portugal for centuries. A significant example within the present dissertation is Niepoort. Furthermore, as opposed to their traditional mode of action, these companies are currently acquiring their own properties in the Douro to provide an important part of the production (Barreto, 2014: 263-264).

The crucial equation of the DDR’s current economy is how volume, surplus, and value are managed under three highly determinant factors: the high costs of production, the physical and regulatory limitations of the craft, and the pressures imposed by the dominant markets. Design might enter this equation through its link with added-value. An important issue signaled by Quaternaire is the existence of great volumes of unclassified wine in the Douro, probably representing part of the surplus, which may threaten a global strategy of qualification. Beyond the major port groups, the DDR includes many
other companies of small to medium scale, which either struggle or thrive in the market by following their own specific strategies. Other wines of the DDR, such as sparkling wines and muscat wines, are residual. Importantly, the report notes that some of these smaller companies, such as Niepoort, are highly visible in the specialised media and in the foreign market, and have significantly contributed towards the reputation of the whole craft (Quaternaire, 2015: 53-54). This floating scenario presents opportunities and risks, which may be tackled beyond viticulture, oenology and legal frameworks through design intervention.

Since the beginning of the financial crisis in Portugal, in 2008, and until 2015, a number of new international investors (French, American, Brazilian and Angolan) entered DDR with a particular interest in Douro’s dry wines. With this grounding motivation, they have either acquired local properties or engaged in strategic partnerships. As the sector is still predominantly defined by fortified wines, the effective figures resulting of these new interventions are small within the scale of the DDR’s economy. However, IVDP’s statistics demonstrate that they are changing every year, and that a rise in value might also be a sign of quality turn.

On a different perspective, Douro’s newcomers are also highly visible. Just like the developments of the beginning and the mid-20th century, they brought new investment and new knowledge resources into the DDR. Furthermore, the partnerships established with prestigious and innovative winemakers caught the attention of international media. What is clearly different from the old times regarding this recent wave of investors, is that almost all of them have focussed on Douro’s dry wines.

The Quaternaire report highlights the innovative path that followed. Particularly that beyond the classic dry wine reds, Douro’s white wines are also seen as a promising reality. The widespread planting of red grapes supported by European funding until the late 1990s caused a diminishment of white grapes’ supply. But with the innovative intervention of producers that started growing local varieties at higher altitudes, a new character of the Douro was found in white wines. Influential actors and companies that are mentioned by Quaternaire for their ground-breaking role are also included in the case studies of the present research, namely: Dirk Niepoort (Niepoort wines), José Luís Moreira da Silva (Quinta dos Murças), Maria Emília Campos (Churchill’s), and Esteban & Tavares (Crochet).

The Quaternaire report highlights that Douro’s dry wines have been progressively mentioned and praised in the international and influential press. Positive reviews on DOC Douro wines have appeared in The New York Times, the Financial Times, as well as in specialised magazines, such as Decanter, Wine Enthusiast and Wine Spectator – the latter with a particular reference to Matt Kramer’s July ’15 chronicles, also mentioned by oenologist Bento Amaral (2014). Yet, due to a reported lack of more reliable literature, the authors employ the term ‘impressionism’ to define this phenomenon. The present study, however, counters this observation with sound referencing that supports the recent growth and international visibility of Douro’s dry wines (Johnson and Robinson, 2009: 172-174; Goode and Harrop, 2011; Barreto, 2014: 259-279; Mayson, 2013: 245-248).
Wine tourism, as well as the recent increase of tourism flowing into the city of Porto, has influenced the internal consumption. Therefore Portugal is now the second largest market of Douro wines. Both developments are still regarded with caution by stakeholders, because there is no evidence this will be a transforming and permanent shift. As much as the increase in the local tourism of Vila Nova de Gaia and Porto has raised the internal consumption of port and DOC Douro alike, it is too early to predict whether it is a solid and sustainable investment. Furthermore, this development is not extendable to the DDR due to the lack of physical and human resources to accommodate demanding touristic flows in the inner territory. Despite the existence of a few successful cases, the recent history also evidences failed projects (e. g. the ‘Aldeias Vinhateiras’ initiative and local luxury accommodation), which is important to learn from (Quaternaire, 2015:122-123).

A representative example of Douro’s complexity is demonstrated by the course of events which happened in 2011, the year of a big financial crisis in the region. The producers were handling a huge surplus, dictated by the regulatory restrictions to port production. However, in terms of viticulture and oenology, that year was signalled as one of the best vintages of the decade. In a region where low yields are already characteristic due to the nature of the landscape, it seems paradoxical to impose yearly limitations to what the winegrowers can use, independently of the oenological qualities of the vintage. Because this applies only to port production, the prices payed for grapes without beneficiuo (destined to DOC Douro wines) are subject to great speculation. Often small farmers are so desperate to sell their excess of production, that the grapes are traded for less than half their actual cost. In the long term, this may become unsustainable (Quaternaire, 2015:110-117; Symington, 2017). The surplus is therefore a significant structural problem, and possibly a cause of great inequalities within the DDR.

Describing a scenario where traditional practices and precepts are still a major influence, especially regarding property and viticulture, the Quaternaire authors highlight the needs of professional expertise at many levels. The recent reform of the old representative body ‘Casa do Douro’, which was a very long and intricate process, made way for a new balance within the regulated system, by putting an end to a long history of power, conflicts and debt. Thereafter, the report credits the positive action of the IVDP, as well as the benefits of the certification system, acknowledging both as relevant structures for the sustainability of the craft. The warranty seal in particular is recognised as a quality symbol – an advantage – as well as the marketing actions promoted by the IVDP, which have been especially favourable to small producers with less economic means. However, as already stated, the beneficiuo system is regarded as a more controversial or ambivalent tool within the craft, which might be improved through adaptations or updates (Quaternaire, 2015: 110-117).

According to the same report, the complexity of the DDR lays within the system’s two coexistent realities: the production/market environment, and the owners/representatives environment, each characterised by an intrinsic ‘disjunctive’ dynamic:
– Viticultural practices versus ‘shelves’, i.e. production versus market;

– DOC Douro versus port, i.e. a myriad of niche producers and intermediate companies versus five big conglomerates.

Another issue identified is the lack of innovation, especially in relation with DOC Douro wines, which is seen as a disadvantage compared to international competitors in the sector. The authors argue that innovation initiatives and developments might be achieved with a more structured and steady link with academic research. The latter is acknowledged as an existing potential in the region, yet developing mostly in parallel. Therefore, a more active cooperation between academia and the wine craft is seen as a change towards innovation that ought to be operated.

The consequences and reactions to the phenomenon of the world’s decline in the consumption of fortified wines, which was mentioned earlier, depends on the companies’ specific markets. Under these circumstances, there is evidence that port is doing better than for example sherry or Madeira, due to the growth in the consuming of special categories; a decline of consumption in France has been compensated by Britain’s resilience (although still relying on tradition and on the older generations). Distinct and innovative strategies of communication are thus suggested to tackle this fragility, with an emphasis on marketing (Quaternaire, 2015: 39; 121).

Finally, the Douro wine territory has an excessive vine area (ca. 43.500 ha) with very low yields, about 4.300 kg per hectare. In comparison, other wine regions appear to have more profitable yields: 13.300-17.000 kg per hectare in Chile, Australia and the USA; 8.000-10.200 kg per hectare in France and Italy. Additionally, local farmers detain very small properties (43% own less than half hectare; 92% own less than 5 hectares). Another problem related with small (family) farming, which is characteristic of the Douro, ageing of the local population has increased and aggravated in the last 20 years; this is a major problem because even the biggest companies depend on the working force (INE, RGA 2009; Quaternaire 2015: 53). Furthermore, the highly specialised human work that is required due to the special conditions of the DDR is not compatible with seasonal working flows (2015: 122). Although the factors presented above may have a significant impact on the Douro wine craft, they cannot be tackled by design.

Contrasting the problematics set forth above, promising and challenging factors are also impacting the Douro wine territory. The current positive dynamic in the Portuguese wine scene was caused by both an increase of producers/bottlers and the notoriety of particular wines and regions in the international media. This is for example the case of Vinho Verde, Bairrada, and Dão. However, structural problems within the craft that had already been identified in the Porter report have persisted until the present date. For example, the collapse of many wine cooperatives, which were highly influential in Portugal until 2004, considering that they were responsible for more than half of the country’s production. As the influence of cooperatives decreased, the production became more fragmented. Also, a common characteristic of most Portuguese wine territories (including the Douro and with the exception of southern Alentejo), is
the production of very low yields. Compared to competitors, for example neighbouring Spain, the contrast is apparent. This, of course, has had a direct impact in the low numbers of wine exportation, in terms of volume. However, the quality shift operated by the port wine companies while adapting to the current challenges of the global trade of fortified wines, demonstrates that value might compensate for volume. Contrary to volume, which is bound to wine production, the value of wines is an aspect that can be tackled by design through their visual communication.

On a different note, there are signs showing that the positive impression and notoriety of Portuguese wines in the external market is more linked to particular regions, than to the country of origin. This is a significant aspect for the present thesis. ‘Country of origin’ shelves are a traditional way of displaying dry wines in supermarkets, and due to the country’s low volumes, Portuguese wines are usually placed on the Spanish shelves. Therefore, although the craft’s volume limitations will continue to constrain the claim for ‘Portugal’ shelves in foreign markets, evidence shows that the ‘country-of-origin’ approach might not meet the directions of current consumption. This is especially significant in niche markets, where specific regions, locations and even particular vintners are being more highly regarded (Goode and Harrop, 2011: 235-245).

The Quartermaire report issued in 2008 had signalled deficiencies in marketing strategies, but the 2015 update remarks that ‘companies are starting to see’ communication as an important avenue for progress, either in oenological terms, or through other forms of communication. It is not clear, though, how design is understood by the study’s authors because marketing is defined as ‘communicational and human resources’, as well as ‘architectural projects for modern wineries’ (Quaternaire, 2015:120).

Local varieties are both an opportunity and a challenge. In viticulture and oenology, the singularity of DDR’s native vines is being explored by the stakeholders, but communication problems persist. For example, the varieties’ unusual names which are difficult to spell and to remember by the consumers. A suggested path might be the investment on premium and super premium markets (2015: 47, 49).

The Quartermaire report also questions the fact that the sector continues to operate and aims to compete externally with BOB (Buyers Own Brand) wine lines. In particular, the challenges and the risks of
promoting the trade of Douro wines as BOB is highlighted: if, on the one hand, exportation is facilitated, on the other it can result in additional pressure for lowering prices. Hence, this specific market will push the Douro wines into an alignment with wines originating from places where productivity is higher, and the costs of production are lower. In the long term, this can become unsustainable. Moreover, the BOB system tends to subsume different products under homogenised categories. Therefore, the report admits BOB wines might compromise the differentiation that is being built within the DDR, especially in the view of more sophisticated markets. In Chapter 4, the reader will find an illustration of how this problem is addressed through visual identity and the design of wine labels, thereby reinforcing that it is not guaranteed that BOBs will contribute to enhance the distinct character of Douro wines (Quaternaire, 2015: 120). This issue is also understood within the present study as a problem of cultural homogenisation (Appadurai, 1996: 425).

Finally, the report aligns with the contemporary discussion of the main players in the region, and advances that is crucial to increase the monetary and perceived value of Douro wines. The document stresses a crucial aspect which can’t be overlooked within any proposition consonant with a sustainable strategy: the imbalance between the high costs of production within the DDR and low-priced wines. Indeed, all the shifts operated within the last 20 years in the DDR cannot be dissociated from these two key elements, and they are fundamental towards the sustainability of the craft: The first one, on the production side, is the price of grapes; the second, on the trade side, are the pressures to the price of wine in shelves (especially in the international markets). The authors of the report caution that no future should be projected without taking a balance between the two factors into account (Quaternaire, 2015: 16-17).

This section has clarified that making wine in the Douro will never be easy, inexpensive, or plentiful. The DDR’s intricate and interdependent circumstances – characterised by harsh physical conditions, a costly production and low yields –, as well as the fast and unpredictable changes in worldwide consumption, make it very difficult to extract profit directly from wine production and to compete in the global wine trade. The craft’s appellation system, managed by a governmental body, is both protective and restrictive. A dual criterion has been established for the management and trade of the region’s flagship products – port and dry wines –, somehow producing an imbalance. As the production of dry wines is growing and the fluctuations of global wine consumption emerge, the DDR struggles for sustainability. Otherwise, as stated by geographer Álvaro Domingues (2017), the Douro can also be defined by an ‘excess of identity’. The latter is the result of a long history of viticultural and mercantile tradition, cross-cultural influences, as well as an extensive and outstanding natural and cultural patrimony. Contributing to this scenario is also the recent notoriety of Douro’s dry wines, which are the focus of the present thesis. Therefore, the conditions of producing and branding wine in the DDR are at the same time problematic, exceptional, and promising.
2.3 The path of Portuguese design: myths and facts

In 2010, designer Henrique Cayatte was invited to deliver a talk during a conference on wine exports, held at the Alfândega Congress Centre in Porto. At the time, he was the president of the Portuguese Design Centre. A conference attendee, reportedly a Douro winemaker, addressed the panel to challenge Cayatte specifically, by declaring:

‘Regrettably, I am forced to assign the design of wine labels and packaging to British professionals, because Portuguese design is provincial.’

Cayatte answered: ‘My dear friend, you look about my age, so allow me to use an expression from when we were kids – *Quem vai à guerra, dá e leva* (‘two can play at that game’). I listened to you respectfully and now I will use your own words: Regrettably, *your attitude* is provincial’ (his tone was ironical and the audience applauded). ‘Ten years ago’ [Cayatte continued], ‘I wouldn't be sitting here so confidently, nor using the same arguments. But what we see now is a new generation of designers, a new generation of businessmen, a new generation of oenologists… I believe the new reality of wine in Portugal is quite tangible, it is not merely wishful thinking. And the quality of Portuguese design work has raised immensely (Cayatte, 2014).

The prejudice and the myth evoked in this dialogue, respectively towards Portuguese design and the idea that ‘foreign is better’ is a lively illustration of the issues surrounding design recognition in Portugal, particularly within the wine craft. Contrary to other fields where design has steadily engaged since the 1980s such as publishing, media, music, culture, public services, education and fashion (Bártolo, et al., 2015, Vol 5: 62-91; Vol 6: 69-70), in the Portuguese wine craft visual identity and design have been fairly neglected, affecting the consumer's perception on the wines’ value, especially in the external market.

So far the only comprehensive study providing concrete figures on the particular relationship of design with the Portuguese wine industry, the Porter report pointed out the amateurism of Portuguese wines’ visual presentation. Identified as a major weakness (‘the Achilles’ heel’, ‘a serious problem’ and ‘bad image’ were the terms employed), this sharp review was supported by two surveys conducted in 2003 to test British and American consumers’ perception on Portuguese wine packaging. The report stated that there was no acceptable reason for not guaranteeing a well-designed wine packaging, due to inexpensive production costs and the existence of competent and experienced designers in the country (Monitor Group, 2004: 26, 38).

As mentioned in the introduction, the present research was motivated by an intrigue on what caused the low professional participation of designers within the Douro wine craft, as well as persistent misconceptions about the design practice. These issues become especially relevant as they seem to contradict the developments and growth within the wine trade. Furthermore, they also emerged from personal accounts of key interveniens in the Douro while the initial research was being conducted (Amaral, 2014; Coelho, 2014; Niepoort, 2014). Therefore, beyond the challenging circumstances already identified in section 2.2, it is important to consider the existing obstacles within the design field because they too might undermine
any proposition of a shifting paradigm. Taking the ‘Douro revolution’ as an example, the process of change (in winemaking) would not have been as successful without the trust of local farmers, traditional producers and companies in the ‘new wave’ of influential professionals. Social scientist António Barreto (2014: 261) claims this was a rather quick and effective transformation: companies and winemakers that have integrated oenology, biotechnology and modern viticulture in their production have not gone back to old times’ routines and empirical methods.

Hence, to establish a parallel with this new ‘oenological’ communication, any significant and cohesive change in the wine’s image would require a similar reliance in design professionals and researchers. Nevertheless, although academic training in design is not much different from that of their wine-related counterparts in terms of length, exigence standards and rigour, designers are still not sufficiently engaged. This may be a sign of the scarce wine-related design research, as stated, but the way the paths of wine and design interwove in Portugal – especially in the Douro – may shed a different light on the roots of the missing dialogue. Therefore, in the following paragraphs a summarised account of Portuguese design history will be made, while drawing its connections with the Douro wines. An emphasis on particular moments and events might help tracing back the reasons for misapprehensions, the origins of certain visual clichés, as well as the long lasting (public and institutional) unawareness of design.

The first historical link between the Douro wine craft and Portuguese design is the establishment of Aula de Debuxo e Desenho (Class of Drawing and Design) in the city of Porto in the 18th century, following a request by the Companhia Geral da Agricultura das Vinhas do Alto Douro. Acting as a local governmental body by the means of its autocratic creator, the Marquis of Pombal, the all-embracing Companhia extended its initiatives much beyond collecting taxes and regulating the trade (Sousa et al., 2006: 113-115). Due to important and exclusive international markets such as the British and the Brazilian, there was an urgent need to protect the risky shipments with war vessels and highly trained officers. This motivated the Companhia to request the creation of the first superior education institutions in Porto: Aula de Náutica in 1762, Aula de Debuxo e Desenho in 1779 and finally Academia Real da Marinha e Comércio in 1803.

The classes were devised to provide basic seafaring training, technical drawing skills as well as trading and commercial knowledge. The three courses informed the most remote foundations of the University of Porto, established in 1911 as a confederation of those early public schools. Aula de Debuxo e Desenho clearly developed a primitive conception of design. Queen Maria I was asked to give approval for the course as both a convenient and indispensable education for seafarers. The course provided technical training for the design of machinery and tools, mapping and topography, design plans of cities and ships, etc (Santos, 2011:18). The name of the class reflects the practical as well as the artistic aims of the education.

The nuanced meanings of debuxo and desenho, at that time, are significant: the former referring to sketching or ‘artistic’ drawing, the latter more technical, associated with practical constructions (or what
would later be referred to as design). Over the time and until the present date, in the Portuguese language, the two terms blurred into the single word desenho (drawing) and the English-borrowed ‘design’ term, but in neighbouring Spain these differences are still apparent: dibujo means drawing whilst diseño means design.

It is intriguing that nearly two centuries before the introduction of design in both academic curricula and the Portuguese language, the link had primitively been established by the foundational Douro institution. Drawing from these findings, I argue in this thesis that the Companhia can be acknowledged for both creating the first regulated demarcated region in the world and for associating an early form of ‘design thinking’ to the needs of the wine craft. Subsequently, the regulative system prevailed, with a significant influence on the Douro and in other European wine regions to the present day, but oddly the design thinking approach was nearly lost until the last three decades. As the thesis aims to clarify what lies behind this gap, it also argues on the benefits of a deep engagement of design. Therefore, it is fundamental to re-establish such an important collaboration between the two fields of design and of winemaking.

The lack of political cohesion, combined with a late and subtle industrial development, is the first and perhaps most obvious explanation for the prevalence of historicism and tradition in the Portuguese artistic scene and academia. When other countries in Europe were already experiencing avant-garde movements (cubism, expressionism, futurism, neo-plasticism, abstractionism, etc.) and incorporating them into industrial production and design work, Portugal was still experiencing political instability – a Portuguese pattern of the late 19th century and early decades of the 20th century – that recurrently prevented major educational reforms and hindered the development of an advanced design culture (Providência, et al., 2010: 41-42). Design history researcher Margarida Fragoso calls this an ‘ambiguous’ period, emphasising the turn of the twentieth century eclectic styles of graphic ephemera, such as posters and adverts for Adriano Ramos Pinto port wines (Fragoso, 2012: 77).

In the first two decades of the 20th century, before the dictatorship period, there were isolated contributions with signs of modernism originating in the avant-garde movements of fine art and literature. ‘Design’ work was conducted by artists, architects and, in many cases, unknown authors or professionals from the printing industries and lithographic workshops. At this time, design and designers were not even words present in the Portuguese language. This is important to mention, because some of the substituting terms are still in use and may contribute to the persistent misapprehensions surrounding design professionals (Barbosa, Calvera and Branco, 2010: 162-167).

Swiss designer Fred Kradolfer (1903-1968), who established himself in Portugal in 1924 as a window dresser for Pasteur Institute, became a very influential figure. Due to his prior education in Zürich and Munich as well as a nomadic working experience in different European cities, Kradolfer became a skilled practitioner of figurative modernism and avant-garde lettering. He is credited for introducing this fresh graphic language in Portugal when historicist and traditional styles were still predominant
The first ‘design’ and advertising studios were set up in this period: *ETP* – *Empresa Técnica Publicitária* (1910) in Porto, *Publicitas* (1920), *Empresa Nacional de Publicidade* (1925) and *Atelier ARTA* (1926) – all three studios where Kradolfer worked as a collaborator –, as well as *APA – Agência de Publicidade Artística* (1927), among other collectives. More prepared for the use of modern (lithographic) printing techniques, these studios introduced street posters and outdoors in Portuguese urban public spaces, which had a significant impact in the modernisation of communication strategies to the public eye.

Port wine companies, recognising the potential of the novel street posters, took advantage of this new medium and dedicated significant investment to advertising strategies, as can be observed from the examples in Fig. 2.9 and Fig. 2.10 of Porto Constantino and Porto Borges (Barbosa, 2010: 52-53).

![Fig. 2.9 Poster Quinado Constantino. Design by ETP Empresa Técnica de Publicidade, Caldevilla Gráfica, Bolhão, Porto, ca.1910](image-url)
Selected work was commissioned to foreign artists, and the influence of French poster artists was significant; A. M. Cassandre, for example, produced posters for Port wine (Fig. 2.11) (1901-1968).

Fig. 2.10 Poster Porto Borges, Caldevilla Gráfica, Bolhão, Porto, 1921

Fig. 2.11 Advertising page in Civilização magazine, Issue 18. Design by A.M. Cassandre, print-work Tipografia Sequeira, Porto, 1929.
This was not uncommon amongst Port wine companies due to the importance of the external markets. Foreign commissioning (from both designers and printshops) was facilitated by these companies’ affiliations with the exporting countries. As a result of Port wine’s major exports in bulk, bottling and labelling occurred frequently outside Portugal, reinforcing the practice of foreign commissioning. An intriguing episode regarding both the preponderance of French taste and cultural misapprehension involves one of the most iconic port brands – Sandeman. In 1928, the company commissioned a poster to George Massiot Brown, a Scottish artist working for Lochend Printing Company in London. The silhouetted figure he created depicts a man wearing a long cape and a wide-brimmed hat, holding a glass of port (Fig. 2.17). Despite the company’s explanations that the character represents a Portuguese university student (the traditional uniform includes a long black cape), the Sandeman ‘don’, as the iconic figure became known, is composed mostly of visual references of the Spanish culture. Namely the sombrero cordobés, a traditional Spanish hat, the obvious reminiscence of the fictional character Zorro, created in 1919 by Johnston McCulley, not to mention the Spanish designation don (sir). In sum, all the distinguishing features which have rendered this mysterious character so iconic until today. Another significant detail regarding this commission, Brown has purposefully hidden his Scottish ascendancy in the signature (the work is signed G. Massiot) to suggest that the poster had been designed by a French artist.

Three paradigmatic examples of these early decades are therefore representative of what would become the dominant and recurrent imagery in Portuguese wine labels throughout the 20th century:

1) Heraldry and related signs, such as coats of arms, seals, marks and signatures;

2) Historicism and the visual repertoire of victorian ephemera;

3) A modernist approach under the influence of the avant-garde movements or art-déco, often originating in contributions from the outside.

The influence of the Estado Novo
The establishment of the dictatorial regime, which lasted from 1933 to 1974, was a contradictory way out of the former path – possibly again due to political inconsistency: on the one hand, nostalgia for past glories was cultivated by the dictatorship as an attempt of constructing national identity and manipulating the public's opinion; on the other, educated figures from within the regime were not indifferent to modern developments abroad and in Portugal, and they took effective measures to support steady innovations. To design history researcher Barbosa, the 1940s and 1950s were the most influential decades towards a particular and long lasting pattern in Portuguese design. Oscillating between aesthetical dormancy and cultural resistance, this period set the foundations for the understanding and value of design until today (Barbosa, 2015: 2, 11).

For more than 40 years, a general idea was formed in Portugal that modernity and progress were happening elsewhere. Censorship and isolation were the bastions of the Estado Novo (New State). Under the dictatorial regime, design production and activity were first dominated by a self-imposed nationalistic
ideology and the aesthetic models of popular culture. The National Propaganda Secretariat (SPN) provided the sole background for the ‘official’ design production and communication, which was disciplined by an effective censorship service (Bártolo, et al., 2015, Vol 3: 19). Around this time, the branding constructions of traditional products such as Portuguese wines – particularly Port wine from the Douro – were still reflecting the original cultures of their international distributors, clearly responding to the taste of consumers in the exporting countries. This was more evident in wine label design, while posters and flyers reproduced similar clichés.

Designer and scholar Francisco Providência proposes four communication frameworks that build on this imagery to describe the visual rhetoric of port wine communication of that time. According to his categorisation, only the ‘laconic’ typographic model escapes the exotic fantasy, fiction and tales which were conveniently held ‘captive’ by the regime’s propaganda to disseminate an image of historicism, folklore, rusticity and colonial glory (Providência, et al., 2010: 12).

Towards the second half of the 20th century, significant transformations occurred in Portuguese design. Until then design was not even mentioned, taught or practiced consistently as an independent discipline. In the 1950s product designer António Sena da Silva started publishing his first essays on the subject of design in Arquitectura magazine. Around this period, signs of modernism and counterculture emerged through graphic work, namely in book covers and magazines (Bártolo, et al., 2015, Vol 3: 76-79).

Contradicting the more conservative previous agendas, writer and journalist António Ferro – the cultivated director of SPN – proposed the collaborations of modernist artists, designers and architects (even some that opposed the regime) for the sake of a ‘modern national’ aesthetics. Fred Kradolfer, Maria Keil, Bernando Marques, Ofélia Marques, Carlos Rocha, TOM, Botelho and Stuart were amongst this new wave of collaborators. In the Portuguese colonies, designers and architects that were less constrained by the metropole's censorship added their contribution to this renovated approach. In 1960, the National Institute for Industrial Innovation (INII) – a governmental organism dedicated to industrial research – incorporated design as an independent discipline and established a dynamic nucleus for industrial design. The inaugural ‘Portuguese Design Exhibition’ was curated by the INII in 1971. This was the first ‘public appearance’ of the design word (Fragoso, 2012: 66).

A radical transformation
Design was finally (and formally) recognised as a discipline and as a profession in the mid 1970s. Soon after the democratic revolution, which took place in 1974, the first design courses issued by Portuguese public schools were established (1975): Communication Design and Product Design at the Fine Arts School in Lisbon (ESBAL); Graphic Design at the Fine Arts School in Porto (ESBAP). Despite the revolutionary zeitgeist and the potential for change, a certain inertia prevailed in education, which forced many students of that generation to abandon studies and to pursue their learning process in a professional environment, as was the case of designers Henrique Cayatte and Jorge Silva (Barbosa, Calvera and Branco, 2006; Fragoso, 2012: 66-67). The Portuguese Designers Association (APD) was established in 1976 and published its foundational manifesto O Lugar do Design (The Place of Design).
The APD aims were to represent designers nationally and to promote professional competence, visibility and professional recognition (Bártolo et al., 2015, Vol 8: 42).

The 1980s and 1990s were clearly disruptive in terms of education – designers could now obtain an independent degree in universities and specific schools. Guided by a ‘delayed’ Bauhaus approach, design was taught, thought and practiced under the modernist framework, as well as ‘form follows function’ principles (Barbosa, Calvera e Branco, 2006).

Established in 1985 the Portuguese Design Centre (CPD) would last 28 years with six presidency mandates, of which only two were led by designers – the remaining four being architects (Appendix C). Significantly, actions towards the public and governmental recognition of design professionals, as well as the frameworks behind the organisation’s structure and mission were always taken under the designers’ presidencies. The turn of events of this period – which were coincident with the beginnings of the Douro revolution – highlight two influential fields in the course of Portuguese design: architecture and industry (the latter focused on furniture, textiles, shoes, ceramics and glass). After the financial crisis in the early 1980s, Portugal’s entry into the European Economic Community (EEC) in 1986 initiated the boost of Portuguese economy, an effort for industrial development and a culture of urban consumerism amongst the population (Bártolo et al., 2015, Vol 5: 5-6).

In 1989, designer António Sena da Silva became the president of CPD. Under the motto ‘Portugal needs design’ he positioned design in an exclusive relationship with the Portuguese industry. A strategy he would later describe as ‘design’s main role’ (Fragoso, 2012), and to a great extent one of the most influential views on national design, it set the boundaries of design action in the governmental and political perspective for the decades to follow. A motivation campaign for the improvement of industrial design, promoted by the Ministry of Industry and articulated with a governmental development program (PEDIP) aimed at modernising certain sectors of the Portuguese industry, using design as a ‘moderating’ discipline. This may explain why current governmental understandings still fail to detach design from traditional industrial sectors.

The former influencing circumstances changed significantly in the 1990s. Portuguese design has expanded its scope of action to different areas such as publishing, music, education, services and cultural environments (Bártolo, et al., 2015, Vol 5: 62-91; Vol 6: 69-70). These were times of celebration and of exhibitions with international visibility, e.g. Lisbon ‘94 – the European Capital of Culture –, and the world exhibition Expo ‘98. New private media channels, publications, the world wide web and digital communication influenced a more open and sophisticated visual culture in Portugal. Postmodernism introduced a new eclecticism in design (Fragoso, 2012: 133-134). By integrating governmental bodies in its structure, the CPD aimed at a broader scope for national design, but over the years this strategy proved more fragile than effective (Cayatte, 2014). The centrality of Lisbon and a certain ambiguity between the roles of design and architecture are also evident throughout this decade, despite the development of new design courses and the emergence of an influential generation of designers in Northern Portugal.
In 1992, design dean Daciano da Costa (1930-2005) published an essay entitled *Design e Mal-Estar* (Design and malaise), with the following opening statement:

Concerned designers, distracted theorists and critics, reticent (industrial) producers and an astonished public, are the picture of the malaise of and in Design (da Costa, 1992).

As an influential educator, da Costa intended to discuss the failures and the fragilities of Portuguese design, in his view a less socially considered profession. Observing the growing interest of the disciplines of Economy, Engineering and Art for design, his manifesto expressed the contradictions that afflicted design professionals in Portugal at that time. In particular, da Costa questioned the lack of clarity of the creative processes originating in other fields, unconstrained by the realities of production and markets, as they opposed the designers’ practice within project-led methodology. Regardless a more negative tone throughout his essay, the scholar proposes a constructive path towards the public awareness of design:

Mastering drawing techniques and applying the Design Methodology with balance is a condition for solving new problems, even in a market that is compounded of other professions, possibly more socially acknowledged (da Costa, 1992).

Meanwhile, in the wine world, the Porter report emerged from the resilient political understanding of an industrially-led country, and thus analysed the Portuguese wine sector as a viable industrial system (according to Porter’s economic framework). The report was relevant for Portuguese wine in general, leading to the creation of the promotional agency Wines of Portugal, but it is no surprise, given the conservativism of the DDR, that it had little impact in the Douro context (Amaral, 2014). Porter’s document is also contradictory with respect to an advanced, specialised view of design, as that expressed above by Daciano da Costa. This is especially relevant concerning design’s contribution to added value within the process of branding and marketing wine.

Porter refers to his own general proposal of ‘wine clusters’, a view that focuses on corporate strategy. However, according to scholar Steve Charters, the wine cluster approach misses two fundamental aspects of contemporary wine producing regions: the value of singularity, and the influence of local references, either specific vineyards or particular vigneron. In sum, it lacks the notion of territorial branding (Charters, 2014: 2).

The report is therefore biased towards a generalised view of the sector, broadly defined as ‘Portuguese wine’. As such, it disregards the value of diversity and distinction that is characteristic of wine regions in Portugal.

The Porter report details (simplistic) guidelines for a better visual approach in wine image as it subsumes all national wines under two contrasting styles: ‘Simple Classical’ for quality and tradition and ‘Modern Elegant’ for simplicity and sophistication.
Further contradictions of the report concern both the role attributed to design and an intriguing unawareness of Portuguese design professionals. Nevertheless, it stresses the invaluable work of competent designers. The (monetary) value that could be added to a bottle was calculated to demonstrate the positive return as a compensation for investment in design; yet it focuses in material aspects, disregarding symbolic value and a broader design intervention, clearly addressing the consumers’ expectations at the expense of place of origin and the wine’s intrinsic identity (Monitor Group, 2004: 27). Thus Portuguese wine companies are encouraged to affect designers to address the competitive British and American markets, but despite recognising the existence of competent professionals in the country, the report's annexes compile a contact list for British and American design studios and institutions, omitting any Portuguese reference (Monitor Group, 2004: 71-73). At the time the document was disclosed to the public, the Portuguese Design Centre was unaware of the proposal (Cayatte, 2014).

To some extent, in Portugal the public visibility of design events, the way they communicated design work and activity, through mainstream media and by designers themselves, has contributed to the idea that design is a sophisticated ‘bubble’ of luxury and expensive products – the so called ‘designer’ goods (Moura, 2012). An idealised image of the designer as the author of exclusive artefacts, focused essentially on form and aesthetics, replaced the former conception of industry-affiliated practitioners. Designers’ limited editions made for an elite of wealthy consumers are a rather common approach in the Portuguese context (Bártolo, 2012). This belief, to a large extent, prevented the recognition of design as an accessible, real-world, problem-focused, and operative practice, naturally deprived of much of this proclaimed glamour. Another angle on this debate might then explain the low engagement of designers within the wine craft, despite the fact that it has been an area of (potential) design practice for a long time. In this respect, design critic Mário Moura acknowledges the image of wine as a ‘classic’ area of professional intervention in Portugal. Nevertheless, the scholar remarks it has been ‘fairly mistreated’ (Moura, 2011). From the above we can discern the persistent unawareness of design.

To further understand the role of design within the wine craft, the following examples evidence the perceptions of different Douro stakeholders, in both commercial and institutional contexts. Fernando Coelho, winemaker and owner of Quinta de Tourais (one of the thesis’ case study), recalled that a member of his wine group (and owner of a different brand) admitted he was ‘afraid’ of assigning a designer: on the one hand, he had the impression that the budget would be unaffordable; on the other, he thought that he would have to accept any design proposal, even if he didn't like it (Coelho, 2014).

In 2015, the IVDP organised their second Port Wine Day annual event. This was one of the few conferences over the last years where design was part of the debate about strategic issues for the region. However, between the panel Douro 3.0 – Past, Future and Pertinent Questions and another that followed entitled Luxury – Effort and Strategy, the designers's participation was allocated to the latter, clearly biased towards the idea that the design practice concerns the world of luxury products (IVDP, 2015).
Filling the void of Portuguese design statistics, in 2012 the SEE Platform (Sharing Experience Europe/Policy Innovation Design) provided a complementary demonstration on the broader role of design in the national panorama. SEE is a network of eleven European partners engaging with governments to monitor and to integrate design into their mainstream practice. Through studies, research, workshops and other influential actions, the platform has built a bank of evidence to support design’s engagement into innovation policies. This data is then published in a document called Design Policy Monitor (2012, 2015). In SEE’s study of 2012, Portugal sits at stage 2 of the four stepped ‘Design Policy Ladder’, a model of four ascending stages. According to SEE criteria, it confirms the pattern of an industrial-based design policy. A ‘delayed’ position, compared to countries that evidence a greater level of innovation and design integration by achieving stage 3 – service design – and stage 4 – strategic design. Such is the case of Finland, Denmark, Estonia, The United Kingdom and France (Whicher, Cawood and Walters, 2012).

SEE’s researchers rely on data provided by local design organisations or representatives. Susana Marques, the Portuguese respondent for the 2012 report, confirmed the difficulties of bridging design actors and compiling the requested evidence. Therefore, due to the lack of respondents, the most recent document issued by SEE Platform (2015) addresses only the Portuguese context of design education, highlighting a gap in regard to progress on innovation, professional participation and to a broader influence of design.

On a different note, in 2016, the Northern Commission CCDR-N published the NORTE 2020 report, a continuation of NORTE 2015: a strategic vision for the competitiveness and development (CCDR-N, 2006). An important link affecting design engagement can be established between these two documents. The new report’s strategy is driven by ‘smart specialisation’, a concept proposed by the European Commission based on a prospective diagnosis of regional development from 2010, and a ground for evolution up to 2020. The strategy aims at correcting structural deficits of regions within the EU by identifying priorities and affecting the appropriate resources. It focuses on intelligent development, where regions assess their strengths/advantage sectors and decide which are the clever interventions needed to create the greatest added-value. If this is achieved by a unique local sector such as that of Douro wines, as suggested in NORTE 2020, it can be extended to other products and services within the region (CCDR-N, 2013: 95). At the core of the ‘smart specialisation’ concept, the report highlights a distinctiveness built from the symbolic capital rooted in the territory: a natural and cultural patrimony which is, by definition, unique and irreproducible elsewhere (2013: 107).

The strategy defined in the CCDR-N reports fails to identify the effective contribution of design towards the branding, communication and innovation within the Douro wine craft. A craft that is able to materialise the symbolic capital and which represents the most significant turnover in the Northern region (2013: 98). It is an intriguing omission, considering the knowledge gathered from the previous report. In the latter, the capitalisation of intangible factors towards the construction of ‘brands’ and ‘identities’ with a high potential for internationalisation were as relevant as economic productivity. It
drew particular attention to the symbolic capital those entities were built from, mentioning specifically the Port wine brand as part of a group of connected references of identity (CCDR-N, 2006: 58-59).

However, the 2020 ‘smart’ proposal focuses on economic productivity and identifies eight priority domains of intervention. The region's symbolic capital is affiliated solely with the domain of ‘tourism’, encompassing the competences of management, marketing and ICT. Although design is accredited as part of a relevant critical mass (2013: 27), it is considered only in the domain of ‘Culture, creation and fashion’, focused in the creation of new materials and innovative production technologies. A connection is made with product design and consumer goods, namely textile and fashion items, furniture and jewellery (2013: 30). Clearly then, the relevance of design to branding constructs and other goods, such as wine, is overlooked.

Having outlined the current situation in Portugal regarding the awareness of the importance of design it is possible to see why there is a need to rethink design approaches. The propositions for design intervention made by Sena da Silva in the early 1990s, are important examples of a public perception consistent with the industrially-led role assigned to design in the past three decades. These initiatives have influenced the current view on design of policy makers, unaware that design thinking, process and practice inform a much broader and structural knowledge for sustainable development in specific contexts, such as those of brands and identities. This issue highlights the need of design research to demonstrate the discipline's ability as the most cost-effective form of innovation and adding value, thus contributing to Portuguese design accreditation in appropriate terms (Branco and Alvelos, 2009: 69; Dilnot and Margolin, 2015: 11).

Additionally, in recent years, Portuguese design entered a new fragile stage. The troubled path of the Portuguese Design Centre until its compulsive closure in 2013 (Cayatte, 2014), and the extinction of APD (the Portuguese Designers Association) one year earlier has left designers at the crossroads with a significant lack of institutional support (Cayatte, 2014; Bártolo, 2012).

The study has attempted to clarify why the influence of Portuguese design in the wine craft has been subtle. Beyond the complex characteristics of the wine environment, the persistency of this issue has been fed by designers themselves. From the shelter of academia or of their studios, designers have also chosen not to approach specific problems, pragmatic challenges, or less visible objects. This has certainly affected the way they are regarded in other professional fields, creating ruptures that are hard to heal (Coelho, 2014; Niepoort, 2014). Evidence shows that design schools are rarely seen as strategic partners, and design researchers have chosen not to tackle certain topics, loosing invaluable opportunities to influence other fields. Designers are therefore also responsible for closing themselves towards dialogue with unfamiliar areas. Researchers need to break out of their ‘academic ghetto’ and venture into the professional world to make design knowledge useful to a wider audience and to broader contexts (Tilley, 2006: 7; Poynor, 2012). The lack of connection between scholars and practitioners (or between design education and practice) is not an exclusive of the Portuguese scene, but in Portugal it adds to the historical build-up of misunderstandings. An effort needs to be made to establish new dialogues and to diminish the gap between design academia and the world of practice.
2.4 Embeddedness and disjuncture: principles and constructs

Earlier in Chapter 1, the introductory text has clarified that it is not the study’s endeavour to question the intrinsic (regulative) conditions of the DDR. Nevertheless, it is imperative to understand the fundamental conceptions that lie behind these conditions, so that they may be appropriately acknowledged and tackled within the design approach. The study identifies embeddedness and disjuncture as the pivotal, underlying concepts that link the main problems and challenges of the DDR with the thesis’ proposition. As fundamental, parallel notions to both the Douro wine craft and the design approach, embeddedness and disjuncture will define the theoretical framework of this study, and determine how the dissertation will be addressed as a whole.

To introduce the meanings of the two concepts, the following review will draw essentially from the works of economic sociologist Karl Polanyi (2001) and cultural anthropologist Arjun Appadurai (1986, 1990, 1996). Later, in Chapter 3, it will inform the theoretical framework, detailing how the two constructs might help to address the main research problems, the focus, and the purpose of the study. Guided by the literature review, it was the centrality of the appellation system within this study’s context that first pointed towards the theory of embeddedness. Expressed in Karl Polanyi’s greatest legacy, *The Great Transformation* (1944: 57, 61, 68), the concept is the pioneering formulation behind subsequent discussions on the social embedding of economic life. Polanyi’s work advances a picture on the history of modern economy – in particular 19th century capitalism – as the fluctuations of market economy. The latter, governed by the laws of supply and demand, is presented as a serious threat to people’s rights and wellbeing. In the book’s initial statement, Polanyi declares the following:

*Nineteenth-century civilization has collapsed. This book is concerned with the political and economic origins of this event, as well as with the great transformation which it ushered in* (Polanyi, 2001: 3).

What he means, in broad terms, is that market economy has caused the failure of 19th century civilization. Drawing from this assumption, *The Great Transformation* proposes an ideal reversion from the market economy, a shift that is theorised by Polanyi as a protective return to embedded systems. The measure, as the author claims, aimed at restoring essential social values, and the humanistic principles that used to govern premodern markets (Polanyi, 1944: 54-55, 68).

*The Great Transformation* is a compelling narrative, written almost in the form of a manifesto. Although Polanyi was educated in Law and worked mostly as a journalist and a lecturer (Hejeebu and McCloskey, 1999: 287), his book became a major reference in economic history, due to the great number of topics it contemplates: the great peace (Chapter 1); the gold standard (Chapter 2); the history of economic liberalism (Chapters 3 to 6); the ‘poor’ laws of the 18th and 19th centuries (Chapters 7 to 9); a critique on Adam Smith, namely on the philosopher’s free market economic theory (Chapter 10); the functioning of market economy (Chapters 11 to 18); and, finally, the eradication of market economy as a path towards liberation (Chapters 19 to 21). Polanyi’s thoughts and ideas on embeddedness are presented
throughout Chapters 5 and 6 (Polanyi, 1944: 56-76). The actual word ‘embedded’ is employed only twice. First, as Polanyi inquires into the nature and origin of markets in Chapter 5 – Evolution of the Market Pattern:

The market pattern, on the other hand, being related to a peculiar motive of its own, the motive of truck or barter, is capable of creating a specific institution, namely, the market. Ultimately, that is why the control of the economic system by the market is of overwhelming consequence to the whole organization of society: it means no less than the running of society as an adjunct to the market. Instead of economy being embedded in social relations, social relations are embedded in the economic system (Polanyi, 2001: 60).

A few pages further, Polanyi makes a second use of the term to highlight the contrast between the market economy and other forms of exchange, such as barter, and later declares:

Never before our time were markets more than accessories of economic life. As a rule the economic system was absorbed in the social system (2001: 64).

Such a scarce use of the term is nevertheless important, because the subjacent ideas of protectiveness and social development are clearly articulated (Polanyi, 1944: 57, 61, 68).

Drawing from Polanyi’s resolute stance, which is informed by his scepticism with regard to the free market, the main critical tone throughout The Great Transformation is biased towards liberal economies. This is probably one of the work’s major weaknesses. On this note, it is observed in recent literature that Polanyi’s inflexible views often contaminate his arguments to the point of becoming inaccurate. He claims, for example, that economies prior to the 19th century were not driven by profit, or that the free market is not compatible with any forms of regulation. However, the same critical literature recognises the ample influence of The Great Transformation, especially by opening a ground-breaking debate on the ethics of economic systems. Furthermore, his theory has proved robust enough to support current discussions on alternative economies (Hejeehu and McCloskey, 1999: 285-310; Wood, 2002: 23-25). Indeed, Polanyi’s final chapter, Freedom in a complex society, is both challenging and less antagonistic. It suggests the emergence of alternative markets, and states that legitimate freedom will only exist when the authority of society over any market system is guaranteed (Polanyi, 1944: 252-257). Clearly, then, Polanyi’s claim can be compared to the scope and the benefits of protective, regulative systems, such as the Appellation system that governs the DDR and that is managed by the IVDP.

Polanyi’s concept of embeddedness contrasts the idea of modern liberal economies – the systems of autonomous, self-regulating markets where the logic of supply and demand is adjusted through price mechanism. The scholar intended to demonstrate through his theory that the free market has been ‘invented’, and consists of an exceptional moment in economic history. He claimed that before the 19th century the economies were always nested in politics, religion or social relations, typically generating
ingrained markets (Polanyi, 1944: 3-4, 46-55). Therefore within his view, ‘embeddedness’ terms the opposite idea of an autonomous economy, emphasising the positive relationships of that type of market with the society and the culture in which it is nested. Otherwise, modern (liberal) economies are ‘disembedded’ systems, usually with a life of their own, developing separately from the broader fabric of social life. Driven by the logic of supply and demand, ‘disembedded’ markets are understood by Polanyi as potentially harmful towards people and nature, leaving them vulnerable to the directions of impersonal business (Machado, 2011: 138).

Polanyi’s critics have argued that due to his conservative stance, which has contaminated some of his views on factual knowledge, his thesis has been practically excluded from mainstream economics, where it was presented originally. However, it had the relevant arguments to be continued in economic anthropology and other areas of study (Hejeebu and McCloskey, 1999: 109-110). Hence, the first debates in the fields of social science and anthropology which draw from Polanyi’s ideas in the context of food markets and farming were taken forward from the early 1970s. Examples of the latter are the works of E. P. Thompson (1971) on food riots as response to massive industrialisation, and of J. Scott (1976) on Southeast Asian peasants’ resistance to colonial domination. At the turn of the 21st century, other discussions on the ethics of food systems emerged, such as the slow-food, organic, fair-trade and sustainable community movements. These movements were defined essentially by proposing themselves as alternatives to industrial food systems, within a framework of embeddedness and sustainable development (Jackson, 2013: 140-141).

Polanyi’s radicalised comparison between ‘embedded’ and ‘disembedded’ markets (he argues that the latter have made human values and wealth worthless), has also motivated ample criticism. However, his views have been influential in subsequent constructs of economic sociology that are significant for the understanding of appellation systems. In sum, the core meaning of embeddedness for Polanyi is twofold:

1) As an institutional anchoring of the economy which ensures social protectiveness and ethical standards;

2) As a way of stabilising social order through the use of (market) regulations; in this sense, embeddedness is seen by Polanyi as a political act affecting land, labour and money.

Despite the critique that has been directed towards Polanyi, especially in regard with the fragilities of The Great Transformation, the sociologist can be credited for a primary definition of embeddedness which holds an important link with appellation systems. The term has since been the subject of continuing transformation to become the central concept of the new economic sociology. In particular, it was the interpretation of embeddedness advanced by Mark Granovetter in 1985, anchored in social networks, which led to the diffusion of the concept in the new economic sociology (Beckert, 2007: 8-10). Polanyi was therefore a visionary of the social embedding of economic life, influencing subsequent definitions of moral economies and alternative systems which, as Barham (2009) argues, may include historical and contemporary appellations, such as the Douro.
Contrary to Polanyi’s polarised framework, which is less argumentative as a result of its original aims and analytical nature, Arjun Appadurai’s thinking raises more questions than it proposes, in his own words, a ‘highly defined theoretical agenda’ (Appadurai, 2013: 3). Therefore, by establishing a link between the cultural anthropologist’s theory of disjuncture and the central topics of this dissertation, in particular visual identity and branding constructs, the present study will not only embrace the principles of this philosophical perspective but also its dialectic nature.

A prominent theorist on globalisation and modernity, Appadurai proposes a vision of the world’s economy defined by complexity and constant flows. Challenging simplistic definitions of the global market, which he describes rather as an intricate, overlapping and disruptive order, he argues that these characteristics are as tied with the inconsistencies of economy, culture and politics as they are with the tensions generated by homogenisation and heterogenisation: Clearly, then, Appadurai argues that complexity and conflicting flows have become the central problems of contemporary globalisation. To following review will address these problematics as presented by the anthropologist through his framework of ‘disjuncture and difference’ (Appadurai, 1990).

The theory of disjuncture is Appadurai’s contribution to the forefront debate and exploration of the current phenomena of indigenisation. A debate, he claims, that needs to transcend the sphere of goods to address a much broader and diverse scope, which includes science, culture, politics, and economics. Examining the phenomena of cultural subjugation, i.e. when elements from one culture are overshadowed by another, the theory of disjunction provides awareness of the intricacies, pressures and oppositions involved in specific complex settings. It also attempts to explain the dominances originating in worldwide interactions, in particular the conflicts resulting from cultural homogenisation and cultural heterogenisation.

Appadurai argues that it is important to consider new approaches for operating within these current local-global systems, which are fluid and constantly shifting, at the risk of damaging cultural identities. This alternative path, he observes, would entail moving away from ‘traditional’ models, where markets are seen as inflexible or closed systems, organised solely around manufactures, production and distribution (Appadurai, 1990: 295-296). The theory of disjuncture is therefore seen here a pertinent framework to understand the intricacies of the Douro wine craft, which, as the present review demonstrates, has always operated under challenging local and global constraints.

Appadurai explains the principles behind this theory by designating five terms or dimensions: ethnoscapes, financescapes, technoscapes, mediascapes and ideoscapes. The suffix ‘scape’ is meant to admit various perspectives and may refer to different entities: from countries to companies, from regions to localities, from social movements to organisations, from communities to individuals. Appadurai’s ‘scapes’ are not essentially circumscribed, hence they may operate and interrelate either isolated or closely intertwined, overlapping or in conflict. For a better understanding of these dynamics, the review will explain what each term designates. Ethnoscapes represent the motion of people across cultures and physical frontiers, such as migration flows; technoscapes are the cultural interactions resulting from the
global use of technology; financescapes represent the circulation of capital across borders. Mediascapes and ideoscapes, which Appadurai defines as ‘landscapes of images’, are particularly relevant to communication design; mediascapes are usually image-centred portrayals and accounts of people, people's lives, and places, referring both to the creation (design) and propagation (in any media) of what Appadurai terms as ‘imagined worlds’. Whereas ideoscapes, also interacting within mediascapes, are abstract constructs informed by broader ideological concepts, such as freedom, democracy, well-being, progress, authority, etc. (Appadurai, 1990: 297-299).

Appadurai claims that the odd directions of these ‘scapes’ have always existed, and they have been followed by people, money, goods, machinery, technology, images, and ideas. Yet today, these paths occur at such a pace and scale, that they have acquired an unprecedented power within global culture (Appadurai, 1990: 301). Such potential is also increased by the countless and multifaceted interactions of the five dimensions identified in the theory of disjunction. This broad spectrum of synergies is illustrated in the examples put forward by Appadurai in his essay: the magnetism of lifestyles projected by TV and other media in the Middle East and Asia, current migrations flows, the deterritorialisation of companies, gender politics, or terrorist propaganda. Mediascapes often play an important role in these circumstances and others, such as local and global markets, by using visual representations (e.g. brands, labels) that are chosen or shaped with the purpose of influencing people’s perceptions and behaviour. Associated with ideoscapes, they project a vast repertoire of images and narratives that act as a counterpart within this circular quest, which is constantly enacted by people, money, and goods (Appadurai, 1990: 300-303).

While exploring the global dynamics of the different ‘scapes’ within the framework of disjunction, Appadurai reminds his readers of key instruments, such as advertising and branding strategies, which are used as a means of propagating a social imaginary, i.e. a collective understanding of things and places. Whatever the channels used – in print form, electronically, or both –, the distance between the images projected and their viewers tends to obscure the latter’s discernment of what is reality and what is fiction (Appadurai, 1990: 299). According to the anthropologist, these instruments tend to make visual accounts using distortions or manipulations, but they also offer opportunities of creating positive references from which alternative narratives can be drawn. This view can be linked with an earlier reflection from ‘The Social Life of Things’, in which Appadurai acknowledges the importance of the paths of objects and goods, emphasising that their forms, uses, and trajectories are meaningful and potentially illuminate their human and social context. This, in turn, might help identifying where/when/to whom profit is extracted and value is added (Appadurai, 1986: 13). Mediascapes are therefore powerful tools for spreading relevant messages and help identity or branding constructs to be effectively disseminated.

Finally, the theory of disjunction explores the struggle between the opposing conditions of being rooted and being open – a conflict which is particularly evident within the Douro wine craft, as it operates within local constraints whilst addressing the global market. Further in chapter 4, the discussion will
illustrate how the disjunctive conflict, as discerned by Appadurai, may be transposed to the symbolic value of Douro wines, by means of their visual identity and wine label design. Appadurai considers the sombre as well as the bright sides of the antagonisms which are intrinsic to specific settings. Moreover, he explains the perils and the opportunities generated by global flows. Such conflicts, he claims, are a consequence of global cultural processes characterised by the constant dispute between sameness and difference. Therefore, they often develop as an ideological competition between the ‘triumphantly universal’ and the ‘resiliently particular’, particularly in the form of mediascapes. Within this framework, cultural homogenisation can be replicated through branding strategies as an instrument of controlling, smoothing and propagating landscapes of images. A consequence of the latter is the subsuming of cultural difference, which in turn may (negatively) impact the value of cultural products (Appadurai, 2009: 425).

As it will be discussed ahead, this topic is recurrently raised in debates over heritage in the form of products, visual identity and design, due to design’s key role in generating either homogenous or heterogeneous visual landscapes, uniformity or distinction.

2.5 Place-related conceptions: from terroir to territorial branding

Having considered the implications of embeddedness and disjuncture in the contexts of winemaking and wine branding, the importance of place in identity constructs, regarding the contemporary (food and) wine culture also needs to be explored. The core viewpoint in this section, both terroir and territorial branding support an idea of added-value linked to the positive interactions between specific products and their place of origin. In the context of the contemporary wine trade, this added-value may be constructed within a framework of ethics and sustainability. This framework implies the use of a trustful, ingrained resource – terroir – as a powerful means of strengthening the wine’s identity, while linking the local to the global.

More importantly, this orientation towards place-based identity constructs is not only manageable but also in accordance with the core principles of the Douro appellation system (Appendix B).

The viewpoints covered in this section will explore how such constructs can be understood in the light of different market systems, and as a way of responding to the current pressures of the global trade. The arguments here presented will help reinforce the relationship of place-related conceptions with both the theoretical framework of the study and the design approach, grounded in the concept of territorial branding. Strengthening the originality of the thesis’ core proposition, the review will help to establish a link between place-based conceptions and communication design, particularly in the context of the Douro wine craft.

Far more than mere geographical locations, places hold distinctive meanings and values for individuals. Cultural geographers, anthropologists, sociologists and urban planners have all studied why certain places hold a special meaning to particular people or peoples. Locations said to have a strong ‘sense of place’ have a tangible identity and character that is deeply felt by both local inhabitants and visitors (Tilley, 2006: 12, 21-22). The term a ‘sense of place’ has been defined and used in many different ways, not least within
the visual arts. It may encapsulate both the physical geographic characteristics that make a place special or unique and the more internalised feelings or perceptions that the place provokes in people; fostering personal attachment and sensations of belonging enriched through physical encounter. A ‘sense of place’ is both a social and personal phenomenon that is dependent on human consciousness and engagement for its existence.

Beyond a primary utilitarian purpose as an everyday beverage, wine has been produced, manipulated, traded and appreciated for its taste, status or even healing characteristics. Provenance has always mattered, but it was frequently obscured to wine purchasers until bottling, labelling and branding became a common practice. As the patterns of consumption change, the contemporary wine world has shifted to many forms in its quest for enhancing the wine’s value: from varietal wines to icon, cult or luxury wines – ranging from the industrial and mass-produced, to the handcrafted or the rarity (Charters, 2006: 65, 111-118, 205).

With its long-lasting winemaking tradition, the Douro too, has sought the values which for centuries defined the identity of the region’s wines. Despite the many constraints endemic in the territory, Douro wines have tried to thrive in the global market, yet today the craft faces great sustainability issues, mostly related with the very low profit obtained by local growers and wine producers as they face physical, regulative, economic and social constraints (Quaternaire, 2015: 110-117; Symington, 2017). Currently, the notions of terroir, place of origin and appellation are gaining significance worldwide as they may work as solid, trustful and sustainable underpinnings of identity constructs, quality and value. Branding is a key instrument in this process, holding a powerful influence through the design of wine labels, as the present study will attempt to demonstrate.

Terroir is a concept long rooted in the French tradition of wine and food, where location is considered first when choosing agricultural products. A term and notion first cultivated by French wine producers, terroir is a celebration of place – a particular place. The importance of terroir in determining the quality and style of wines has made it a much-discussed and controversial subject in recent decades. It has originated a considerable number of works proposing comprehensive definitions of the term and attempting to clarify the relations between terroir and appellation systems.

Historian Kolleen M. Guy describes terroir as a holistic combination of soil, climate, topography and the ‘soul’ of the winemaker (Guy, 2004: 165). Wine writer Jancis Robinson argues that the philosophical and commercial viewpoints on terroir may be converging, but she is cautious about narrow definitions: the complexity of the winemaking process makes it difficult (if not inadequate) to establish such a distinction between what is natural and what is manufactured (Robinson, 2015: 738).

These definitions also help to emphasise how terroir embodies the divide between Old World and New World approaches to wine: for the former, the concept encompasses a constellation of cultural referents far beyond the biological environment, whereas for the latter it is usually defined solely by the natural components of soil, topography and climate.
Food anthropologist Amy Trubek defines ‘taste’ as a form of local knowledge that is deeply tied to a particular place. In her book *The Taste of Place* (2008), the reader is conducted on a journey through Europe and the United States, where the author traces and defines notions of terroir and provenance. The vivid examples presented throughout her book evidence why such notions tied to place of origin matter today. Likewise, they suggest why an emphasis on place of origin might matter to the Douro.

Taking the French agricultural heritage and foodviews as the core of the broad debate, Trubek proposes a holistic definition of terroir, including both the tangible and intangible characteristics of a specific territory, as a premise of high-quality food and drink production. The anthropologist explains the contrasting notions that have shaped the global trades of food and wine, exploring the transatlantic oppositions between Old World and New World views. Nevertheless, her stance challenges these classic conflicts, suggesting cross-cultural alternatives to current wine (and food) practices. The scholar advances that these new terroir and taste conceptions may act as mediators between the local constraints of producing sites and the pressures set by global demands.

Trubek argues that the relationship of terroir with taste and quality is recent, and among other reasons can be explained as a form of nostalgia – both a growing interest of people for their origins and an escape from the cosmopolitan city life (2008: 52). Trubek’s view is of particular significance within this research. First, because it establishes a parallel with the current dilemmas of the Douro wine context which, as explained, is trapped between challenging local-global circumstances. Also, because the French wine culture remains an important influence to Portuguese wines in general, and the Douro wines in particular. Drawing a comparison between the French and American interpretations of terroir, Trubek explains the ways in which these two cultures try to enhance the value of unique foods through a bond with provenance, while so many products are being mass-produced around the globe. Exploring terroir either as a socially-engaged notion or as a profitable way of adding value to a product, in this book the two interpretations raise an ethical discussion of the ‘marketability’ of terroir. Furthermore, the stories collected by the anthropologist emphasise the connection of terroir with a sense of authenticity, distinction, quality, suggesting it may influence the willingness of consumers to pay a higher price for products originating from a particular location (Trubek, 2008: 18-44).

In the first two chapters, Trubek explores the most relevant information concerning wine studies: in ‘Place Matters’ (Chapter 1), the anthropologist makes an historical account of terroir, situating the birth of the concept in 18th century France, where it evolved as a cultural knowledge transferred from one generation to the other (2008: 18). Then, the establishment of the wine appellation system is described, explaining how it unfolded until the 20th century, resulting on current French notions of terroir. Two parallels can be drawn here with the Douro: first, with the region’s appellation system, and second, with the development of Douro’s dry wines which, as explored in the initial review, were highly influenced by French paradigms. Chapter 2 of *The Taste of Place* focuses on present-day articulations of terroir. Most of the chapter’s discussion is dedicated to the so-called ‘Mondavi affair’, and the clash of cultures represented by this episode, involving an American wine company and the French village of Aniane.
Trubek’s narrative on Mondavi’s failed attempt to establish a winery in southwest France highlights the way in which the concept of *terroir* takes on different meanings in the Old World and New World contexts (2008: 70-92).

The following three chapters focus on the examples of Northern Californian wines, Wisconsin’s shagbark hickory nuts and maple syrup from Vermont. These case studies are presented with the aim of illustrating how the notion of *terroir* can be expanded from wine to gastronomy. In the final chapter, *The Next Phase: Taste of Place or Brand?*, the discussion reconnects with the present study, highlighting the role of branding in both the future and added-value of products tied to specific places. Using Vermont maple syrup as an example, Trubek advocates the idea of *terroir* as a crucial underlying concept in communication strategies, and as a means of contributing to ‘better’ food and wine global trades. Significantly, the author highlights the importance of the stakeholders’ unity in establishing a direction for branding and communication strategies, especially when heritage, culture and the sustainability of a craft are involved. Furthermore, the anthropologist stresses the attention that must be drawn to classifications and the use of particular names, due to their impact or connotations amongst consumers (2008: 208-211, 213, 217-221).

While discussing the connections between taste, place of origin and quality, Trubek relates her arguments with those of rural sociologist Elizabeth Barham. In particular, she aligns her viewpoints with Barham’s definition of *terroir* as a cultural concept, first, and then as a form of representation, or of preserving a region’s patrimony through labels of origin (Trubek, 2008: 29, 51; Barham, 2003). Barham has studied geographical indications (GIs) in both Europe and America to examine their role in connecting the local to the global, with the aim of creating a project to establish GIs in the U.S. (a country where this system is practically inexistent). Based on the research for that particular project, she defends that label of origin systems are useful tools to associate people, production and places, and to promote collaborations which contribute to sustainable development. According to Barham, this is especially relevant in fragile or peripheral rural economies which struggle with the challenges set by the global market – as the Douro wine craft. In such vulnerable contexts, GIs, labels of origin, or appellations are means of preserving products, practices and traditions which might otherwise have succumbed to the pressures of globalisation (Barham, 2003).

In *Translating terroir: the global challenge of French AOC labelling* (Barham, 2003), niche and specialty products are contrasted with industrialised commodities, evidencing that the former may compensate in value what they cannot perform in volume. Barham’s aim is to examine appellations as relevant means for tackling the problems faced by particular agro-food environments, as they struggle between local conjunctures and the pressures imposed by the global trade. Appellations, according to the sociologist, are ways of tackling local-global challenges bidirectionally: through the concept of *terroir*, they establish a bond with place of origin (the local), whereas through the legal protection of the geographical indication, which operates as a form of intellectual property, they can thrive in the international market (the global).
Barham’s essay draws from her engagement with an emergent debate on labels of origin in the U.S. market. The discussion is held over a latent conflict: In the economic logic of the American business, characterised by a commercial culture which favours disembedded brands, products of individual ownership and protected trademarks are entitled to value or a position in the market, regardless of their provenance. When [fictional] geographic names are used, they become an opposition to the European business logic (2003: 129).

Conversely, Barham advocates the logic of embedded brands. When people, crafts and products are tied to their place of origin, she argues, a sense of security, as well as cultural and economic benefits have the potential to emerge. Grounding her viewpoint in Polanyi’s theory of embeddedness (amongst other theoretical arguments), the social scientist explains why this bond matters to sustainable development: place-based systems re-embed products in the natural and cultural processes of their territories. The reputation of the local environment is leveraged into the reputation of the products, distinguishing them from mass-produced goods. Stakeholders are encouraged or supported to preserve the environment. Hence, within this system, a cycle of value and protection is likely to be maintained (2003: 130).

Proposing a broader debate on place-based systems, the sociologist suggests they might become a development tool for global use, involving different types of investment in the long term, and – importantly – contributing to a more diverse global market. Nevertheless, she identifies the constraints and fragilities within label of origin systems. Barham’s research is an important contribution for this study’s frame of reference. First, it validates a place-based approach, and then, it situates Polanyi’s theory of embeddedness in a contemporary context (2003: 136-137).

Providing an in-depth analysis of different aspects of the French AOC labelling system, the social scientist argues that appellation systems are forms of translating terroir. Within their legal and protective frameworks, appellations may represent positive opportunities for the development of alternatives to the industrialised agro-food system through an emphasis on place. Barham supports this argument with the theories of embeddedness and conventions, which are suggested as useful frameworks for understanding the ways in which labels of origin present a challenge to conventional agriculture. First, by introducing regulations; and then, by emphasising the principles of traditional practices and authenticity. Therefore, these theories help to clarify how origin labelled products managed by governments impact rural development through the specific trades they generate (2003: 128, 130, 131-135).

Barham discusses in particular two advantages of appellations: as forms of contemporary nostalgia, which are appealing because they contrast modern lifestyle; or as ways of preserving memory and identity through a return to cultural roots, within a more authentic framework. Both aspects are opportunities for building added-value, an advantage to products which are unable to compete in the global market on a basis of volume or mass-production.

In sum, the social scientist claims that appellations may be considered as positive alternatives to conventional or industrial systems of production, responding to different crisis, challenges, and shifts currently happening
at the global level. To Barham, the expansion of label of origin systems globally represents an opportunity to develop new forms of local-global connections, especially regarding agro-food products such as wine. Finally, Barham’s construct of appellations as forms of ‘translating’ terroir, including its natural, social and cultural characteristics, is especially relevant towards this study (2003: 130).

Peter Jackson’s *Food Words – Essays in culinary culture* (2013) proved an invaluable reference of interdisciplinary knowledge regarding key topics of the thesis, as well as current debates and controversies that extend across food studies, anthropology, social sciences, the humanities – and design. This collection of essays was especially useful to link the study’s core discussion with Polanyi’s theory of embeddedness and the thinking of Arjun Appadurai, namely through the topics of authenticity, markets, branding and the local-global issues. Although the book is motivated by a specific research project focused on consumer anxieties about food, the broad theme of the publication is culinary culture, framed within food studies. Due to this underlying motivation, the reader will not find specific entries on wine, wine labels, nor design. However, useful connections with each of these topics can be established through the discussions on authenticity, brands, labelling, the local-global polarity, markets, moral economy, packaging, provenance, sustainability, and values. Despite its extensive topic list, the compilation is consonant with a unifying approach within cultural studies, and seeks to emphasise the social and cultural contexts of food – not excluding drinks –, as well as the connections between production and consumption (Jackson, 2013: 6-7).

In an essay on ‘authenticity’, Jackson (2013: 27-30) explores the difficulties of defining the concept as an academic term, especially in food studies. The scholar alludes to the scepticism of several authors in accepting the term. One of them is Arjun Appadurai, who justifies his resistance with the indiscriminate use of ‘authenticity’ in commercial circles. Nevertheless, Jackson adopts the notion of authenticity as something factually true, which by extension refers to products (or artefacts) whose provenance is either genuine or possible to validate. The author develops his essay by exploring the notion of authenticity essentially in the context of culinary culture; however, particular reflections are worth a connection with the world of wine, and Douro wines in particular as they evoke the effects of multicultural characteristics. These reflections presuppose a more ‘nuanced’ understanding of the culture surrounding production and consumption, acknowledging that it is neither fixed nor impermeable to different sorts of influence. On this note, the essay closes with the proposition of an ‘ethical approach’ to authenticity, one that challenges the notions of purism and permanence – which are often associated with cultural heritage issues.

Later in the ‘Commodities’ entry, a new reference is made to the thinking of Appadurai, while discussing the path of products in a supply chain. To evaluate the status of these products in the global market, the anthropologist claims, it is crucial to identify the stages within the chain where value can be added and profit extracted. These reflections aid a discussion on the importance of design within the context of the present study. On the one hand, design action may be considered a stage of added-value in the supply chain. And on the other, the research points the recurrent lack of design participation
within the Douro wine craft. Other relevant observations within the ‘commodities’ essay refer to Appadurai’s text *The social life of things* (1986), namely to his postulation that the meaning of things is inscribed in their forms, their use and their trajectories. In other words, it is the fruition and transitional condition of things which values their human and social context (Jackson, 2013: 49). This notion can be transposed into wine labels, likely affecting their value, by adding a symbolic dimension to these artefacts which complements their operative function.

Appadurai is referenced further on in *Food Words* to discuss the polarity between the local and the global, a topic which will be explored more in-depth in the study’s theoretical framework. In addition to the structural thinking behind the theory of disjunction, the process of ‘indigenisation’, as defined by Appadurai, is also quoted in this section:

> At least as rapidly as forces from various metropolises are brought into new societies they tend to become indigenised in one or another way (Jackson, 2013: 122-123).

Thus, to the anthropologist, indigenisation is a phenomenon of influence or domination which develops rapidly, as soon as a metropolitan force enters a given society. The situation can be observed in the Douro since the 17th century, when the first foreign merchants began to market wines outside the region. Its impact on the paths followed by the craft has been explained earlier in the review. However, wine labels are perhaps one of the most visible expressions of this phenomenon, as is the cultural diversity expressed in the names and brands of Douro’s wine companies (Sandeman, Gran Cruz, Niepoort, Ferreira, Symington, Rozês, Wiese & Krohn, etc.). All of this ought to be considered to understand which directions should be taken when adopting specific communication strategies.

Establishing a connection with the study’s theoretical framework, Karl Polanyi is referenced by Peter Jackson in the ‘markets’ entry. In this particular essay, Jackson recognises the philosophical contribution of the social scientist to modern markets. Presented by Polanyi in *The Great Transformation* Polanyi’s theory of embeddedness has influenced contemporary conceptions of cultural and moral economies. This presupposes that the path to a balanced and responsible evolution of markets ought to involve a form of trade embedded in social relations of reciprocity and trust (2013: 127). Further on in Jackson’s essay, under the sub-theme *Moral Economy and Its Application to Contemporary Food Studies*, Polanyi’s contributions are again resumed. In particular, they are associated with contemporary debates that explore the ideas of the markets’ quality turn and alternative practices. For example, organic or localised forms of production, fair-trade production, farmers markets, the ‘Slow Food’ movement, etc. (2013: 140-141). Jackson’s connections with the theory of embeddedness highlights the relevance of Polanyi’s philosophy within the present study, namely as a supportive framework for the appellation system of the DDR.
In an essay on labelling, researcher Richard Milne addresses in particular the regulatory issues and technical data which labels are required to display. In the case of wine labels this would be the origin, the vintage, the bottler, the grape varieties, certain chemicals, the levels of alcohol, etc. Although Milne examines specifically date labelling, the article's substantive discussion is relevant because it defines labels as ‘war zones’, where virtually all topics can be debated, and on all fronts: by activists, researchers, consumers, producers, regulators, etc. This thesis is an example of the latter, adding the professional engagement of designers to the debate.

Milne discusses the balance of what labels ought to display: on the one hand, these artefacts are scrutinised over their opacity, for insufficient information, or because they risk being misleading; on the other, the burden of excessive and overly restrictive regulation is criticised (2013: 116-117). A useful definition of labels is also presented: ‘(...) the medium through which information about food [and wine] qualities is provided by manufacturers or governments, and through which practices associated with social, ecological, and individual responsibilities are promulgated.’

Milne remarks that mandatory labelling regulations have been less studied than, for example, voluntary labelling or certification systems. The legal decrees of the DDR concerning the visual presentation of Douro wines, compiled in Appendix B, may evidence this observation. Furthermore, the pertinence of the present study is reinforced, because tackling the communication of Douro wines through wine labels will necessarily involve discussing the criteria and the management of the regulations.

One of the problems identified by Milne is the ubiquity of this type of labelling and the fact that its importance for consumers has not been sufficiently assessed. It is necessary, Milne argues, to open the ‘black box’ of mandatory labelling to understand how these artefacts might be defined or improved. Such inquiries might help to understand how they work and how they link complex stakeholder networks, as well as production and consumption settings. Milne concludes his essay with an alternative definition of labels, proposed by Sally Eden (2011), which highlights their bridging potential: the labels as ‘boundary objects’ (2013: 120).

Further on, an article by Peter Jackson explores the topic of ‘provenance’. It also refers to the works of Elizabeth Barham and Amy Trubek, particularly where provenance intersects the notion of terroir. Jackson formulates a definition of the term within the entourage of place of origin and appellations. In this sense, provenance is first and foremost associated by the scholar with a sense of authenticity or genuineness, which are guaranteed when the source of products is verifiable. Provenance may also expand towards the legal dimensions of ownership, entering the world of brands, appellations and intellectual property. Finally, in the context of geographical indications, a link can also be established between provenance and the ideas of heritage and tradition.

The legal framework of appellations in Europe, Jackson argues, is relatively recent, but it relates to much older concepts of brands and branding, for example, the ancient practice of marking cattle and thus identifying ownership. The author also refers to the important relationship of provenance with the
idea of terroir, admitting that not only the taste but also the surrounding culture and the methods of production can be considered in the notion of provenance (Jackson, 2013: 160-161).

Finally, a discussion on the interpretations of ‘value’ is introduced by Peter Jackson. This article is important because it debates both the ethical and material issues involved in clarifying what might be defined as the value of a product. The article starts by acknowledging the ambivalence of the concept of value, a notion that has been widely explored both in the context of academia and of the market. Value, Jackson asserts, may paradoxically refer to the price of specific products, or to something we are attached to, whose monetary expression cannot even be quantified. The definition of value becomes even more complex if aesthetic and symbolic qualities are to be considered, and its quantitative expression must be calculated. However, when physical and material conditions impose particular constraints, these are often more easily transposed into value. Forms of inferring wine value are also presented by Charters to discuss the concept of territorial branding. As evidenced earlier in the review, this is a topic of particular relevance, considering the current constraints within the Douro wine craft. For example, the high costs of production, the low prices of grapes in situ, and the pressures on price set by the external market.

Beyond the specific environment of the Douro wines, the study sought further acquaintance on wine culture and the contemporary context of the global market. In this respect, the books and essays of wine writer Jamie Goode (2011) and of Steve Charters (2006, 2011, 2014) were a useful resource for a perspective on the wine craft beyond the Portuguese context. Moreover, they helped to reinforce the importance of place of origin and terroir in the definition of contemporary wines. Charters’ essays, in particular, provided a crucial knowledge base to the idea of territorial branding in wine, which he has been exploring and championing since 2011. Prompted by specific topics, Jamie Goode's observations will be presented throughout the thesis, especially in the discussion raised in Chapter 5. The wine writer has visited the Douro many times, and he is well acquainted with the local wine craft, as well as the territory's idiosyncrasies. Goode has written about Douro wines in his reputed blog – The Wine Anorak – for more than a decade.

The authors of Authentic Wine (2011) are driven by the premise (or the defence) of an increasing emphasis on quality in the global world of wine. Throughout the book, Goode and Harrop project an idea of quality wines which they opt to describe as ‘interesting’ wines. Likewise, they reference ‘interesting’ people and initiatives in the Douro, such as winemaker Dirk Niepoort (central in one of this thesis’s case studies), and a project on sustainable viticulture conducted by Taylor and Fladgate with the collaboration of CIBIO research institute (Goode and Harrop, 2011: 30-31, 34-35, 95-96). Chapter 13, Marketing authentic wine (2011: 235-245), will be the subject of the following review. The authors begin by stating that in the wine sector, marketing is disconcertingly simplistic and neglected, especially compared to other markets or industries. They also note that in this respect, New World stakeholders reveal a different attitude from those of the Old World, which usually results in more sophisticated forms of communication. Possibly this also results from the latter operating with
less legal restrictions, for example about labelling, but also to represent wines less complex and without loads of tradition and heritage, which will facilitate communication. The authors point out as reasons for this weakness in communication the enormous fragmentation of the sector worldwide, but also the few profit margins resulting from the trade, especially in certain contexts, as will certainly be the case in the Douro. Finally, converging with other authors, there is also the persistence of an old and already outdated idea, especially in more traditional settings, that wine quality speaks for itself and therefore is sufficient to ensure its market value (2011: 236).

Regarding an accomplished communication, Goode and Harrop draw the readers' attention to the performance of small wineries, for the effective ways in which they value themselves through 'interesting' and distinctive stories. Moreover, and regardless of their geographical origin, the best representatives of this tactic are able to apply it in a sophisticated way without expending substantial financial resources. This observation is linked quite directly with the case studies presented in Chapter 4 of the present study, some of which may even illustrate this type of performance, for example, the Quinta de Tourais and Crochet. Goode and Harrop also remark that the strategies of large retailers or supermarkets rarely follow this path. Rather, they opt for simplistic, standardising and almost always price-focused marketing strategies. Thus, the authors suggest that specialised merchants and restoration might be the best followers of this type of strategy because it is also in their best interest to promote quality through difference.

Citing the influence of official institutions (such as IVDP and ViniPortugal), Goode and Harrop claim that the consistency of communication is crucial in the marketing of quality wines. Yet, different patterns and agendas may compromise the effectiveness of this communication (2011: 237, 242, 244). The authors highlight the role of wines labels and packaging as ‘critical artefacts’ in wine communication (2011: 239). All the informative, aesthetic and symbolic contents displayed by the wine label will potentially connect the consumer to the history, the heritage and the origin of a wine. Like other authors (Charters, 2006; Jackson, 2013), Goode and Harrop recognise that current wine consumers are more aware of ethical and environmental questions; they are increasingly intrigued by diversity, provenance and authenticity in regard with the wines which they experience. A sense of place becomes relevant, and terroir is perhaps the best underlying argument for the story which needs to be told. The connections of wines with their surrounding culture offer numerous possibilities of distinction, without ever losing a structuring bond with place of origin (Goode and Harrop, 2011: 240, 244).

Throughout the comprehensive work of Steve Charters Wine and Society (2006), the present research sought to obtain a wider knowledge about the world of wine and its culture. This reading complements the literature review of Douro wines history, as it bridges the intangible aspects that may be relevant in the contemporary communication of wines in the world. In this book, the review also sought to explore some central concepts of the present study, such as terroir. These are thus justified and reinforced beyond their commercial dimension, i.e. through cultural and social aspects relevantly influencing the identity of wines. In turn, these aspects of symbolic order cannot be excluded.
from the design process which complements the aesthetic and functional values that are part of the discipline's practice, namely in the design of wine labels.

In Chapter 5, which explores the origins and development of the appellations, Charters acknowledges the pioneering role of the Douro region in the history of wines and explains how these systems operate as forms of intellectual property. The author evaluates the impact and effectiveness of appellations in wine production contexts. Not only he refers to the criticism to which appellations are subject, mainly by the actors of the production, but also importantly to the way in which these systems add value to the wines (2006: 40, 96, 100, 102-103). In the same chapter, the author develops the notion of *terroir* as a premise of quality. He explains how the concept intertwines with appellations and place of origin, with the potential to increase the value of wines. From the historical circumstances of the demarcations that gave rise to them, Charters explains the various notions of *terroir* in different parts of the world, and how these inform the current debate. In this sense, he acknowledges some regions are clearly trying to establish a relationship between *terroir* and wine quality to tackle the problems of global over-production (2006: 111).

Acknowledging that branding is an essential part of the modern wine world, Charters mentions the emphasis and investment placed today in the aesthetic and symbolic attributes of wines, which are essentially conveyed through branding and packaging. He also draws a comprehensive notion of wine branding, defined as ‘brand constellation’, from the works of scholar Larry Lockshin (2000, 2003). The latter has studied the specificity of wine brands in contrast with any other manufactured products, given the challenges posed by the nature and production of wine, as well as the highly fragmented characteristic of its sector.

Not excluding the historical evidence of wine branding in the 19th century, Charters observes that a gradual sophistication of branding has been implemented effectively to stand out and to make a difference, especially in the context of fine wines. Given the lack of consensus in what might be a general definition of a wine brand, and the fact that wine is not a static product, different classifications of wines are also examined in this chapter to explain how they have impacted the developments of wine branding: large-volume, icon, and cult wines; as well as fortified, unfortified, and varietal wines (Charters, 2006: 113-127).

Further on, Charters discusses how different producers and brands have sought a sense of authenticity in wines, in order to accentuate their symbolic (and economic) value. The author identifies the systematic use of three strategies (2006: 200):

1) The creation of a history that links the wine to its past and its tradition
   - emphasising heritage;

2) A close relationship with the rural environment, and with the territory
   - emphasising the place of origin;
3) The preservation of traditional ways of producing wine
   - emphasising viticulture and oenology;

A critical aspect is that of genuineness. Authenticity ought to be tackled within an ethical framework, especially when employing a branding strategy. Otherwise, the ‘educated’ consumer might have the perception that he is only being lured by a good marketing technique. This issue, Charters points out, is particularly relevant in the fine wines’ sector. Therefore, it should be considered in the context of the Douro. As the argument intersects with other constructive viewpoints, namely those of Jamie Goode (2011), Branco and Alvelos (2009), and Anna Kealey (2014), it will be discussed further in Chapter 4.

Other relevant questions for the present study relate to the uncertain and ever-changing nature of wine consumption, as noted by Charters. This ambivalence, of course, represents an additional pressure to specific production environments such as the Douro, which already faces many limitations and constraints. Yet being a recurring characteristic of the wine trade, the consumption fluctuations must be taken into account in the definition of robust communication strategies. This particular issue highlights the importance of conducting this research in the field of design, contributing to a more informed and diversified discussion. Indeed, the historical review of the Douro wines has demonstrated how certain changes in the pattern of consumption have influenced the directions taken by the craft. Importantly, Charters illustrates the issue of consumption uncertainty with the Portuguese wine craft, and the Douro in particular. The author notes that in 1939 Portugal was the largest supplier of wine to the United Kingdom, representing a share of 33% of the market. At the time, the latter consisted almost exclusively of port. However, in 2004, less than 2.5% of wines traded in the UK were fortified (2006: 207-208).

Charters asserts that it is essential to draw attention to ways of improving the value or quality perception of wines beyond viticulture and winemaking. In the wine trade, this is often made through the use of extrinsic cues, such as wine label design. An important introduction on the changing nature of wine consumption develops into different forms of wine education and communication, such as books, films, fairs, wine clubs, wine shows, wine tastings, workshops and courses. The topics of wine tourism, wine critics, and wine collection are further examined, but wine label design is but briefly mentioned.

The historical influence of wine literature on consumption patterns is explained. One section includes a brief note on the controversial texts issued by the Baron Joseph James Forrester in the 19th century, where he drew a critique on the fortified wines of the Douro whilst praising the region’s dry wines. Modern wine literature, either in the form of ‘bookish’ encyclopaedias or simplistic wine guides, is set forth by Charters as a response to the influence of the wine critic and to a generation of consumers that require more knowledge about products. However, the influence of printed books had its era and is now virtually residual, having been transferred to the specialised magazines and blogs, as well as to the powerful social media (2006: 209-210).

As an academic devoted to teaching about wine and its marketing, Steve Charters provides useful information regarding the concept of territorial branding, an idea which he develops in the essays
discussed below (Charters, 2011, 2014). Of most relevant to my argument is that the scholar has recently and repeatedly argued in the defence of territorial branding, not only for its various advantages in challenging scenarios, but also for its potential of added-value in the communication and promotion of niche wines – as is the case of the Douro. According to Charters, territorial branding offers a solid strategy, drawn from place of origin, which may contribute to the sustainability of a particular craft. Charters examines this argument from within the areas of marketing and management, which are his fields of research and intervention; therefore, both essays do not concern the exploration of territorial branding in design, and particularly in the design of wine labels. Informed by Charters' arguments, the concept of territorial branding will be linked to the design of wine labels in Chapter 5. Hence, the originality of the present research will partially draw from this new connection which, in turn, informs the study's proposition.

In The Territorial Brand in Wine, Charters, Mitchell and Menival (2011) define the essential characteristics of a territorial brand as it performs for wine. The authors seek to distinguish this concept from other place-related brands, whilst examining its potential strengths and weaknesses. Furthermore, they advance that this concept may be more relevant to wine consumers today than individual brands or country-brands. The joint article is the result of relevant research conducted previously and independently by the three scholars, in Australia and in France, focusing on how terroir operates in the different fields of economics, marketing and tourism. Although different examples are used to illustrate the main arguments, the paper focuses on the wines and the region of Champagne. The authors compare the territorial brand concept with other branding constructs, namely the ‘cluster’ concept previously proposed by economist Michael Porter. The aspects that relate territorial branding with a shared culture, history and mythology as well as the sustainability of particular wine regions is of particular significance for the context of the Douro wines, especially considering the recent challenging shifts within the craft and the growing development of unfortified wines.

An aspect of this joint essay that is relevant for the present study is the identification of structural problems which might affect the communication of wine territories. In particular, the authors discuss the problematics resulting from individual or disparate communication initiatives that may threaten the overall prestige of a region. Therefore, if what is envisioned by the craft’s stakeholders is robust and sustainable development, Charters, Mitchell and Menival emphasise the importance of building and sharing a common vision for the wines’ communication. Moreover, they argue on the strengths and the benefits of grounding this vision on territorial branding.

The absence of a management or supervisory entity, identified in the paper as an issue in New World regions, is not problematic in the Douro due the existence, the mission and the actions of the IVDP. This is not to say that a common vision for the Douro wines’ visual communication is clarified, as evidenced in Chapter 4.1.

Finally, this essay suggests different areas for future research, of which the present dissertation highlights two: the need to persuade owners of individual brands to consider the relevance of the territorial brand; and the importance of evaluating the values generated with the implementation of a territorial branding strategy. The study will return to these key points in Chapter 4.4.
2.6 Wine labels: communicating tangible and intangible value

As evidenced by the historical review, the developments of wine advertising and the wine trade in Europe were not concomitant, and it took long before branding was clearly visible on the bottle, especially in the form of wine labels. For centuries wine styles were emphasised, in detriment of more specific forms of identification linked either with the wine producer or the place of origin. Likewise, in the Douro, wines were first identified by style, then in relation with the buyer or owner, then the merchant, then the shipper, and only recently with the actual producer. The writer Samuel Johnson noted in his journal:

Claret is the liquor for boys; port, for men; but he who aspires to be a hero must drink brandy (Boswell, 1791: 207)

Early forms of identifying wines, as Johnson’s quotation suggests, were often tied to the rituals and social circumstances associated with its consumption (Charters, 2006: 169-171). Such cultural mores have also influenced the wine’s visual communication for a long time. Probably due to the highly fragmented and the conservative nature of the wine industry, old practices and forms of distinguishing wines are still visible in the design of wine labels today (Fig. 2.12). Especially in Old World wine countries, which is the case of Portugal, Spain, France, and Italy, homogenous wine label designs resulted first from recurring to the same local printers. Over the time these stereotypes have been maintained as a mixed reflection of heritage, provenance and ownership (Keers, 2014: 91).

Before entering a more focused analysis of data collected within the present study, the historical path of wine labels in the Douro ought to be traced. The exportation of bulk wine in the Douro was prohibited in the 1980s, but traditional practices prior to this directive have had an important impact on the artefacts’ current design. Until the end of the 18th century, most wine was transported, traded and kept in pipes and barrels. Bottles were handcrafted by glassblowers, therefore their capacity varied. As a protective measure, it was illegal to sell bottled wine in Britain until 1860. The first bottles were also short and wide, onion-shaped, difficult to seal against oxidation and bacterial contamination, and unsuitable for laying down to let the wine mature, not to mention shipping. Hence, bottles were used as vessels at home, to transport wine from the barrel to the table. They were commonly marked with the initials of the bottles’ owner (Fig. 2.13). It was only when bottles were made slimmer, with a longer neck and tightly sealed with a cork, in
the late 18th century, that they started being used for both ageing and bearing the merchant’s brand (Barata, 2009: 44, 48; Mayson, 2013: 17-18).

Fig. 2.13 Old wine bottles, Victoria & Albert Museum

Wine labels were not always relevant artefacts within the wine trade. Their significance has grown since bulk wine was depreciated. With the spread of glass bottles, the role of labels was initially simply informative: a piece of parchment hanging on the bottle, bearing a handwritten note with the wine’s name and/or vintage date. By the 1730s, silver or copper labels were engraved with the names of wines. These labels were known as bottle tickets or tags, individually handcrafted, therefore they were a symbol of social status. Bottle tags were also produced in other materials, such as mother-of-pearl, ivory, and enamel. Preferred earliest designs were escutcheons (shields and heraldic shapes), vine leaf compositions and other decorative frames which carried on into the Victorian period (Fig 2.14). As stated earlier, popular names on silver tags were wine styles rather than brands, e.g. Madeira, Burgundy, Port and Champagne. As valuable objects, bottle tickets were often collected and have been the subject of a number of studies. Clearly they have influenced the aesthetics of the wine craft, and reminiscences of these early wine labels are still observed in contemporary wine communication. This topic will be discussed and illustrated further in Chapter 4.

Fig. 2.14 Enamel wine tags with different shapes and materials, Victoria & Albert Museum

The history of paper wine labels on paper is rather obscure, probably due to the perishable nature of these artefacts. Different authors have written on diverging origins of the first paper labels. According
to scholar Harding, Pier Antonio Micheli, an Italian botanist, was first in identifying wines in paper labels (by hand) as *Verdicchio*, by 1700. Champagne producers followed this practice, yet they indicated the year of the vintage and place of origin. By the mid 18th century, Champagne labels were printed in black type on white paper (Harding, 2005: 51). Geographer François Guichard argues that the first paper labels were made in the French region of Bordeaux, for Sauterne wines, without detailing a date (Guichard, 2000: 371). There is evidence of great quantities of labels being printed in Germany from 1830, and wine writer Hugh Johnson claims that Germany had the prettiest, most richly engraved of the early labels. He also notes that French labels were more provincial in style, usually designed and produced by local printshops, an opinion shared by Keers (Caldewey and House, 2003: 17; Keers, 2014: 90).

What most authors agree on, is that when lithography became more widely used from 1798, the method has had a significant influence in the European production of paper labels and in label design. Illustrations, colours, designs as well as different print runs became possible. Therefore, the technological advancement of printing techniques, as well as the improvement of glues to hold labels in place (a development of the mid 19th century) influenced the progressive growth of labelled wines (Harding, 2005: 50). To increase the buyers’ confidence, shippers started displaying technical information on the label, namely the vintage date and the place of origin, and gradually this practice became a sign of authenticity and value.

It should be noted that early wine labels were special artefacts, sometimes luxury artefacts, made for the trade amongst the upper class, as throughout the rural Europe, and until the mid 20th century, bulk wine was the dominant consuming drink (Lobo, 2014: 172). In Portugal, this period signalled the beginning of the wines’ marketing through posters and labels. The pressures set at this time in the Douro by the British, Spanish and French wine trades (the latter two as competitors), explain their aesthetic influence in port wines’ visual communication. Towards the 20th century, this ascendency was evident on the image of port wines (Barbosa, 2010; Providência, 2010: 21).

In Portugal, port wine bottling and labelling became accepted practices in the 19th century, when bottle shaping and manufacture were perfected, and when it was also found that port aged well in glass. With an airtight closure made of wax over a cork seal, bottles were more protective than barrels against the merchants’ adulterations. An update of this method of wax sealing has seen a revival in contemporary fine wine markets, including in the Douro. The gradual increase of bottling raised the prominence of the individual shippers’ brand on the label. Ferreira is accounted as the first producer from the Douro using wine labels. In 1868, the company started using branded stationary, with the designation A. A. Ferreira. A great bottling lot with the best vintages between 1812 and 1863 was made, and labels were printed in Paris displaying the medals achieved by the company’s wines in the International Exhibitions of Porto and Paris, respectively in 1865 and 1867 (Fig. 2.15).
The company branded each wine with the names of their estates. In 1887, Ferreira addressed the famous Parisian printshop Gouthier, Dreyfus & Company, and ordered labels for their wines with depictions of Quinta do Vesúvio, Quinta de Arnozelo, Quinta do Porto, Quinta dos Aciprestes, and Quinta das Caldas.

The first academic contribution which mentions specifically (but not exclusively) the wine labels of the Douro is an essay by Guichard (1946-2002). The geographer has dedicated a great volume of his scholarly research to the Northern region of Portugal, and to the Douro in particular. In *Le dit et le non-dit du vin: le langage des étiquettes* (2000), Guichard discusses the evolution and the symbolic value of wine labels. He describes how the wine label has evolved from ‘a modest piece of paper’ to a refined communication artefact, the latter drawing mostly on subtlety and sophistication (2000: 365).

Guichard acknowledges that the complexity of the wine label is the result of a necessary combination of both objective and subjective messages. Proposing an exploration of these artefacts’ communication, the article is structured into four main topics: first, the role of the wine label as part of a wine’s discourse; second, the ‘language’ of wines before the existence of wine labels; then, the five periods of the wine label; and finally, the aesthetics of the wine label.

Certain regions, Guichard asserts, being aware of their patrimony and its respective value, opt for transferring this provenance to their labels, by using recurrent emblems such as architectonic elements, landscape features or pictures of traditional villages; others sublimate the reality of their own terroir in less literal symbols – like trademarks, typography or black capes. The essay describes the traditional pattern of Portuguese wine labelling which explains why the stylised curves of the Douro terraces might be the most achieved visual expression of the regions’ wines, but acknowledges the void, the absence of images and minimal design as an alternative allusion (Guichard, 2000: 366-367).

Guichard establishes a relationship between the formal constraints of an artefact and legal issues, by suggesting that the rigorous codes, hierarchies and elaborated language system of the wine discourse are a result of the spatial limitations of the label. Then, he introduces the different ‘discourses’ of the wine label: what is literally said on it about the wine; what is insinuated or suggested; the *mise en scène*
– the context or atmosphere created by the label – and, most importantly, what is not shown nor said – which the consumer will have to guess through visual clues.

In his analysis, the geographer admits his lack of competency and knowledge regarding the technologies and crafts involved in the design of wine labels. By this he means printing, design, advertising and even aesthetics and semiotics. Therefore, although the ‘design’ word is never mentioned, he derives the proposed wine label discourse from a historical timeline which is traced out in five ‘acts’. In other words, it is a diachronic explanation of the relationships between the label’s aesthetics and the changes operated in the wine craft. Guichard’s wine label ‘play’ develops as follows:

I. The beginnings (the nineteenth century);

II. The reassurance (the period that followed the plague of the *phylloxera*);

III. The triumph (after the Big Depression and Second World War);

IV. The adaptation (after the 1960s);

V. The sophistication, (the present time 1990s-2000).

To the scholar, the contemporary wine label is an important artefact for conveying a ‘second degree’ of communication, presuming that the first one is the technical or informational degree. Therefore, he claims that contemporary wine labels ought to say less and suggest more, or speak differently, without losing efficiency.

Since the publication of Guichard’s essay in 2000 and up to the present date, only three major works of which there is a record in Portugal address the Douro wine craft from the design’s perspective. The first one, Magda Barata’s *The Identity of Port wine through the tradition of its packaging* (2009), aims to explain how different aspects of the port wine craft, such as historical, political, technological, regulatory, and commercial factors have been transferred into the visual identity of this product. Exploring the visual features of port wine labels and packaging as rhetorical arguments, this master’s thesis is the first comprehensive analysis of these artefacts that resonates with design practice (Barata, 2009: 96-116). The study attempts to clarify the importance of the visual rhetoric of port wines through their packaging, which is significant for the product’s positioning in the global economy. This work is also the earliest signalling the highly fragmented visual communication within the specific sector of port wine, establishing a connection between this characteristic – acknowledged by the author as a disadvantage –, and the product’s value in the international market. Hence, the researcher identifies this problematic as a motive for change.

An important finding within Barata’s inquiry is that the design of port wine labels and packaging is more tied to the wine’s brand and its traditions than to the characteristics of the actual product (2009:
88). This observation reinforces the persistence of a conservative mindset within the craft, which can also be interpreted as an overall resistance to change amongst the Douro stakeholders – a position already highlighted in the initial review. Regarding the design of wine labels, such a conservative stance is understood in Barata’s study as both a premise that helped preserving the status quo, and a hindrance towards innovating communication strategies.

Barata admits the complexity of studying port wine, due first and foremost to its intricate system of classification, and then, to an extensive network of stakeholders, not to mention the existence of over a thousand different brands. Each brand can split into four main styles of port – tawny, ruby, white and rosé –, and then subdivide into multiple categories: vintage, LBV, crusted, reserve, aged, dry, etc. As a result, the magnitude of the wine universe for analysis is a challenge for any researcher. Therefore, in an attempt to limit the scope (and feasibility) of her study, the scholar purposefully selected 17 brands for the analysis, resulting on a sampling of nearly 500 packages dating from 1933 to 2008 (2009: 91-92). Considering the time frame covered by the examples, the evolution of the visual rhetoric of port in 75 years is illustrative of visual clichés. Repetitive or consistent visual features are clearly identified, which allowed the researcher to build a template of the port wine visual identity including the bottle, the label and the capsule. In a first stage, 20 visual profiles were sorted, according to different styles and categories (2009: 133-143). Finally, a single overall profile was synthesised as the visual identity of the ‘typical’ port wine container (Fig. 2.16).
The profile’s description, enunciating the archetypal visual codes of port wines’ packaging, is detailed as follows: the bottle’s shape is bordelaise with a bulky neck, dark coloured glass, and approximately 30 cm in height. In regard to format and proportion, the label is squared, with a black background, occupying about 50% of the bottle’s surface. The main typography is white or golden foiled, and secondary typography may be displayed in gold or black against a white/ivory background. The capsule’s colour is typically black. Under the capsule, the cork is sealed with a neck-type warranty seal.

A significant finding reveals that the traditional use of silkscreen (or white stencilled lettering on the glass) has become infrequent, representing only around 10% of the study’s broad sampling (2009: 123, 127, 147). On this note, the survey does not mention the strategy of simulating silkscreening by using white or golden print on transparent film labels, currently in use. Neither does it refer to the weight, texture or finishing of the paper. In general, the study tends to emphasise the importance of the container over that of the label, which explains the length of sections dedicated to wine vessels or to the importance of glass (2009: 35-48).

Barata observes the resulting profile is not as differentiated as other types of (competitive) drinks, such as gin, vodka, or vermouth. As a result from the analysis, she claims the archetype is accurate and mirrors the study’s sampling, yet it may fail to fulfil desirable expectations, either regarding an optimal visual identity or the consumers’ demands. The visual rhetoric of port wines oscillates between a fragmented set of traditional options and the influence of trends from the industry, which in turn seem to result from little investment in design (2009: 91). Barata concludes that the design choices of both labels and packaging are more tied to the history and traditions of each brand than to the product itself (wine), suggesting that this practice may have hindered the development of innovative branding strategies (2009: 88).

The visual profiles resulting from the analysis, as well as the methodology presented by the researcher to inform each case study, are meant to work as a framework for further inquiries and practice. Future works, Barata suggests, ought to be conducted to improve the visual communication of port wines, with the aim of finding a stronger positioning within the contemporary market by raising their symbolic and economic value.

In her final discussion, Barata advances that the samples with a higher degree of distinction may be found in the exception, rather than the rule. These alternative examples opt for vintage containers, different bottle shapes or silkscreen printing (instead of paper labels). The original cases of brands that use differentiated packaging are compared by the author with the sophisticated sector of haute-couture perfumes.

The study raises awareness of the need to advance alternative design propositions, suggesting that a more consistent stylistic approach might benefit the competitiveness of port wine (Barata, 2009: 147-148), albeit not advancing an actual model. Likewise, as the purpose of this work was to deliver an analysis circumscribed by the parameters of the researcher’s methodology (2009:
104, 106), aspects involved with the role of design within this context are only briefly mentioned. Nevertheless, Barata opens her study to further research or design practice, suggesting that contributions towards new design concepts and packaging of port wines – in search for distinction and brand value improvement – are a much necessary investment (2009: 147-148).

A second design study addressing the Douro wine craft is Helena Lobo’s doctoral thesis, *The Visual Identity and Graphic Typology of Port Wine: Wiese & Krohn (1865–2010)*, published in 2014. This work was developed from the extensive documental analysis and organisation of a body of visual ephemera belonging to one single Douro company – Wiese & Krohn. The latter, a port trader and producer of Norwegian origin, has been acquired and managed by a Portuguese family since the 1930s, until it was recently incorporated into one of the biggest groups within the port trade, Taylor and Fladgate (Lobo, 2014: 287-303).

Lobo’s archival work covers visual ephemera dating from 1865 to 2010, which is the period extending from the company’s establishment to its more recent change of ownership. The analysis compiles a collection of visual data, such as wine labels, posters, flyers, trademark registers, promotional gifts, commercial documents, advertisements, etc. Wiese & Krohn’s main port wine brands – Krohn, Arnsby and Falcão Carneiro – were the study’s principal case studies. A graphic layout, consistently used in the wine labels throughout the company’s existence, was identified. The latter was only changed and updated when a rebranding strategy was set in place, between 2009 and 2011 (2014: 371-376, 381).

The research work implied the cataloguing of different visual data and iconography used mostly to advertise and represent port wine. Lobo claims the originality of her study relies on a methodology which differs from those used by historians or social scientists, i.e., one that is defined by the design perspective, and which draws from the visual elements informing a body of visual ephemera (2014: 48, 57). On this note, the analysis synthesize a graphic typology based on three design features: colour, typography, and layout. The typology was first explored within the three brands of Wiese & Krohn, and then it was replicated in 32 competitive port wine brands.

Thus, the documental nature of Lobo’s initial inquiry, resulting on a hypothetical visual template for port wine labels, is reinforced and confirmed by the final comparative analysis, proposed as a verification method (2014: 405).

This study denotes a sense of preservation, as it is extensively descriptive, and the researcher assumes its essential documental nature. A complementary objective, it aims at raising awareness of the role of design and designers in the construction of port wines’ memorabilia, as well as the visual culture that is part of this product’s environment.

During the period that separates the two studies summarised above, the exhibition *Images of Port Wine: Labels and Posters* was held, first in 2010 at the Douro Museum, and the following year at the University of Porto. Curated by designer Francisco Providência, the exhibit displayed a collection of historical labels, packaging and posters. Its principal motivation was to highlight the importance of
these artefacts in the history and the construction of port wine’s identity. In particular, it aimed at exploring how the product’s value was built in Portugal and in the international market through its visual communication. The display included both original artefacts and (print) reproductions, obtained with the collaboration of Port wine companies, printshops, and private collectors. Presented also as an historical account of port until the mid 20th century, through a collection of visual artefacts, the initiative included an extensive illustrated catalogue with essays of design scholars Francisco Providência (on the visual identity of port wine), Helena Barbosa (on port wine posters) and Magda Barata (on port wine labels).

Providência, who coordinated and designed the exhibition, describes the selected artefacts as visual demonstrations of an evolution of port wines’ identity. Together, they evidence the efforts made by port wine companies to sell and to position their wines in the international markets, by adopting different visual rhetoric strategies. Such tactics, the scholar asserts, were often attempts of surpassing the organoleptic materiality of the product by highlighting its otherwise symbolic or aesthetic values. Despite the companies’ different affiliations, the use of an identical and recurrent repertoire of visual elements is noticeable. This resemblance allowed the researchers to articulate four consistent communication models or archetypes, usually expressed in visual clichés, with either a connotative or a denotative character. The first archetype evokes sexual, religious, historical or cultural connections. The second one links the wine to its therapeutic qualities. The third archetype highlights the awards, accreditation or prestige, achieved by particular brands through their own merit or by heritage. The fourth model emphasises the factual information, such as the year and location of the harvest, grape varieties, category, ageing process, etc. (2010: 11-12).

The exhibition demonstrated that until the mid 20th century, these attempts were hit-or-miss constructs, and left a heritage of both extinct and resilient brands, as well as the craft’s visual clichés. In a few isolated cases, iconic examples that have resisted the pace of time revealed a robust and emblematic brand identity, for example the Sandeman’s ‘don’ trademark, or Ramos Pinto’s voluptuous and sophisticated illustrations (Fig. 2.17). Both companies have continued to use these visual icons until the present day. Others remained as curiosities, such as the port wine labels and advertisements emphasising the product’s healing, anti-depressive, digestive or stimulant properties. These latter examples, pre-dating the 20th century, were often bottled and sold by pharmacies or by health institutions.

Despite these singular examples, Providência concludes that it was the laconic and more discrete visual style, focusing on the tangible aspects the product, that ultimately prevailed in the visual identity of port wines. In this sense, the scholar clarifies that the exhibition’s purpose was not confined to a collection of crystallised port wine ephemera, but rather aimed at discussing the present and future communication of this product (2010: 13).
2.7 Summary

This chapter has addressed a number of topics and problematics which are of significance to design practice within the Douro wine craft. Five central ideas were explored throughout, and enabled to identify the following:

1) The core characteristics of the Douro wine craft, and its current problems and challenges:
Diversity, complexity and cross-culturalism are ingrained characteristics of the Douro winemaking tradition. The establishment of the geographical demarcation and the development of the region as an appellation system has had a significant influence in the craft up to the present day, including in the wines’ visual communication. The latter is essentially conveyed through wine label design.
Due to the peculiar characteristics of the territory, making wine in the Douro will always be difficult, complex and costly. Despite the wine sector’s steady growth in recent decades, the region faces serious problems of sustainability, therefore inexpensive and ubiquitous wines, as well as ambivalent communication, might compromise the sustainability of the craft.

2) The path of Portuguese design, and its points of connection/disconnection with the Douro:
An account of how design has evolved in Portugal, from the academic education to a broad professional integration and recognition, helps to understand the importance of the discipline within the country and in the economic and productive environments. Moreover, the intersection of the particular path of Portuguese design with the country’s political history clarifies the circumstances which contributed to the persistent (low) awareness and credibility of design in Portugal. Such developments have been mostly influenced by an industrially-led and more superficial understanding of design, and tend to
disregard the strategic contributions of the discipline towards crucial or problematic issues. An account of the successive unsettlements that shaped the path of the Portuguese Design Centre, until its closure, highlights the designers’ lack of recognition and institutional support.

Occurrences of potential (and missed) connection have also been referred to cast light on the reasons for the lack of dialogue between design and the Douro wine craft. Thus, the review has clarified that the ‘Douro revolution’, which was led by new perspectives from oenology and viticulture, has not been paralleled by a corresponding design progression. The study has identified a gap in the academic production, within the field of design, concerning the discipline’s relationship with winemaking, in general, and the Douro wine craft, in particular.

3) The definition of embeddedness and disjuncture as the underlying frameworks of the research:
Traditional systems of agricultural production, especially in niche sectors of the worldwide economy (such as regional wines), are being challenged today by the pressures set by both the changing trends and the demands of global markets. As the review has revealed, this is currently affecting the Douro wine craft, and represents a threat to the sustainability of the region’s economy, given its dependency on the wine trade. Considering the limiting physical and managing conditions of the Douro, also constrained by an intricate system of regulations, it is clear that the craft does not have the flexibility to adapt nor change according to fast and constantly different directions.

Embeddedness and disjuncture were therefore found as defining and unavoidable characteristics of the Douro wine craft, reflected both on the DDR regulatory system as well as on the local-global pressures and paradoxes which currently affect the production and the trade.

4) The importance of place-related conceptions in wine communication:
Scholarly research on the connections of value with wine and territory is recent, therefore propositions of change and responses to specific problems are still subject to debate. However, the literature under review has suggested that place-related conceptions, e.g. terroir, have the potential of enhancing the wine’s value through extended interpretations of the product’s provenance, namely beyond the tangible aspects of the territory. As a consequence, the concept of territorial branding is unfolded and set forth as a way of transposing an expanded notion of terroir into the sphere of design.

5) The role of wine labels and communication design within the Douro wine context:
Wine label design is a fundamental aspect of contemporary wine communication. This is especially relevant for niche wines operating in the global (liberal) market, such as the Douro wines. In the DDR wine labels are mandatory artefacts, and they are also subject to strict regulations regarding visual presentation. Nevertheless, Douro wines’ visual communication is fragmented and lacks a structural direction, contrary to the crafts’ viticulture and winemaking. The regulations specify imagery restrictions, but are omissive in respect to an underlying strategy guiding the wines’ visual communication. The participation of design within the craft is scattered and contributes to the symbolic deficit in the wine labels of Douro’s dry wines, affecting their perceived value.
The review of the socio-cultural field relating to wine has also revealed a persistent unawareness of design within the craft. The discipline and its practice are either unmentioned or vaguely referred to in the general literature as ‘marketing’ or ‘publicity’ (Charters, 2006; Goode and Harrop, 2011: 235-245; Barreto, 2014: 261-262; Symington, 2017). This is not to say, however, that the low awareness of design within the wine craft has developed solely outside its boundaries. Clearly, the investigation into the recent path of Portuguese design has also confirmed a marked lack of interest and participation of design professionals and researchers in the wine environment, which helps to explain the low footprint of design research and innovation in the wine craft.

Concerning the specific theme of wine label design, the review has evidenced a deficiency of academic inquiry, in general, and of studies dedicated to the context of the Douro, in particular. To demonstrate this lacuna, and possibly foster further research on these subjects, a survey on recent international publications on the topic of ‘wine label design’ is resumed in Appendix E. Again, what has been set forth above might explain why the discipline is almost absent from this body of works.

In sum, the historical, theoretical and practical contexts here presented will enable to map the central argument of this thesis, for the designer being involved in the wine label creation. The circumstances which determined the different and parallel paths of Douro wines and Portuguese design speak to a persistent lack of dialogue between the two fields in regard to strategic issues. This is an intriguing finding, considering the growth and development of the Douro wine craft from the 18th century up to the present day, the symbolic and strategic relevance of wine labels within the market environment, and the steady engagement of professional designers with the wine world. This gap, which was later confirmed through a closer contact with the craft’s stakeholders while pursuing field observation and data collection in the Douro, has been identified as the main problem of the research. However, an alternative perspective shows that promising and exceptional connections are currently being established between designers and the Douro stakeholders, especially at a professional level. Although the resulting outcomes have been determined by isolated strategies, as a consequence of the companies’ demands, I argue in this thesis that much can be learned from these examples to inform a common tactic towards the craft, a further contribution to bridging the worlds of design and winemaking.
3 Methodology

3.1 Introduction

This chapter will present the philosophical and theoretical anchors of the research, as well as the design approach, and the methods applied. The scope and limitations of the thesis will be laid out by situating its fundamental guidelines amongst existing research and related studies. In doing so, I will also outline my stance as a researcher.

As the contexts of the study were being explored and understood, the research developed steadily and has been non-linear in its formation. However, the following argument has been central throughout: that although design knowledge may integrate aspects of the social sciences, the humanities, and engineering, design encompasses ways of knowing, thinking and methods of addressing problems that emerge from the design discipline or process itself. An idea that has been championed by different design theorists (Simon, 1969; Cross, 1982; Schön, 1983), supporting the value of a deeply engaged design practice. This premise, the theories, the knowledge and the findings discussed in Chapter 2, as well as the purposive case studies presented in Chapter 4, contributed the grounding base which defines the dissertation’s approach as a whole: philosophically, epistemologically, methodologically and analytically (Grant and Osanloo, 2014: 13-14).

I restate that the choice of developing this research around problems rather than questions is meaningful, and arises from the practice of design, which is essentially problem-oriented (Schön, 1983). This pragmatic stance has enabled me to position the study within a design-oriented understanding of knowledge which strengthens the relevance of particular design approaches, and highlights the value of a more engaged professional participation of designers within the DDR.

Furthermore, the challenge of developing a dissertation within this context without supporting it with statistical data or established science-based research methods arose when the first discussions and presentations were conducted at the IVDP (Appendix H). Then, as initial research findings were exposed to scrutiny and debated with the Douro stakeholders, it became apparent that a robust theoretical underpinning was necessary to support the arguments set forth in this thesis. Subsequently, the two theories of embeddedness (Polanyi, 1945) and disjuncture (Appadurai, 1990) were identified and articulated with the following purposes: to provide a lens with which to view the contexts of the Douro wines and Portuguese design (allowing for a coherent explanation of the observed phenomena and problematics), to support the thesis’ core arguments on territorial branding as well as the design approach, and to illuminate the methodological plan (Grant and Osanloo, 2014: 21).

Most research was conducted within the DDR, especially when this implied visits to the Douro estates and to the IVDP. However, the data collection was not geographically confined to the region, and included in-person, skype and telephone interviews with the designers and other main actors, as well as visits to wine fairs and shops in the UK. The greatest restrictions of data collection emerged from the interviewees’ availability, and from the lack of recorded/stored material describing the development of the design processes, since all of them have occurred before the start of this study.
As a multi-faceted form of inquiry, the study’s methodology is presented as an original contribution towards the existing body of research concerning design within the context of the Douro wines’ craft. This is done by focusing on the following three aspects: Douro’s dry wines (as opposed to fortified wines); the current practice of wine label design (as opposed to past practices); and a holistic view of the design process.

The frameworks, approaches and methods described in the following sections are complementary and they constitute both the philosophical and the empirical support of this study. The first section presents the theoretical framework, summing up the two concepts of embeddedness and disjuncture and explaining how it has guided different stages of the research. The following section describes the research approach, which has influenced the case studies’ analysis and discussion from a designerly perspective, as well as the thesis’ proposition. The final section presents the different methods applied, as well as the criteria for selecting participants, case studies, and information sources. The handling of open-ended interviews, as well as the principles behind the handling of the data collected will also be clarified.

3.2 The theoretical framework

Following the presentation of the two theories of embeddedness and disjuncture in Chapter 2, which has described and situated these constructs in relation with the contexts of the DDR and of Portuguese design, this section emphasises how the theoretical framework will work as the backbone of the processes of inquiry, review and analysis (Grant and Osanloo, 2014: 12-13).

Two key theoretical concepts are therefore concurrent within the research and, as explained previously, draw explicitly from the contributions of sociologist Karl Polanyi (1945) and cultural anthropologist Arjun Appadurai (1990). This is argued firstly as the two theories relate with the contexts, key themes, and problematics of the DDR, and secondly, as they underpin the thesis’ proposition on territorial branding, which will be unpacked in Chapter 4. Building on from the literature review, I argue in this study that the two theories are not just ‘a frame’, but they provide a new insight into the current problematics, challenges and opportunities within the Douro wine craft. Not only they enable a broader understanding of the local circumstances, but they are deeply bound to these contexts and must be considered within a proposition of change.

The theory of embeddedness, intrinsically linked with the DDR’s appellation system, reminds us of the importance of place of origin and guides the regulative constraints within which design must comply. The theory of disjuncture clarifies the complex, often conflictual pressures affecting the wine craft: caught between local difficulties and global demands, suggesting paths that enable to build robust identities, and alerting towards the risks of homogenisation. Hence, in the contemporary Douro wine craft, embeddedness and disjuncture inform significant and intrinsic circumstances that the present study does not intend to question. On the contrary, the design approaches will be laid out by acknowledging these circumstances as the grounding base from which the arguments will be devised, in a logic of added-value and
sustainability. Design is here situated as a bridging discipline/practice that is able to navigate this complexity, and to propose constructive and valuable communication strategies within.

In conclusion, the theoretical framework is a structural component of the methodology which guides the development of the research: embodying its philosophical foundation, highlighting the links with both the observed phenomena and crucial findings, guiding the methodological choices, and supporting the core arguments of the study (Grant and Osanloo, 2014: 19, 21).

3.3 The design approach

The design approach is the fundamental set of principles which will guide the research and support the study’s proposition. As demonstrated in the literature review, scholarly works within the field of design dedicated to the wine craft in general, and to the Douro wines in particular, are scarce. A few studies conducted in other fields establish connections and provide useful information, but their limited scope highlights the need of advancing new contributions. To pursue the latter, the combined principles presented in this chapter will support a critique of the status quo and help to develop a robust proposition of positive change. Social Design will enable the examination of the relationship between the underlying messages in DOC Douro wine labels and the craft’s sustainability. The study’s discussion and proposition, informed by state-of-the-art design practice, will be framed within the ‘designerly ways of knowing’ approach, coined by Nigel Cross (1984, 2001, 2006). Richard Buchanan’s Wicked Problems in Design Thinking will seek to situate the problems identified within the Douro wines context from a design perspective, illuminating a transition from constraints to opportunities.

These three design conceptions, which will be expanded below, have not been introduced in the literature review. With this option, the study aims to establish a more clear separation between the themes and concepts that inform the research context, and those that constitute the research methodology. Embeddedness and disjuncture are discussed in both chapters, because the two theories are ‘hybrid’ constructs which concern both the thesis’ contexts and the study’s methodology.

3.3.1 Social Design

In a joint essay entitled A ‘Social Model’ of Design: Issues of Practice and Research (2002), Victor and Sylvia Margolin advance a research agenda that links the otherwise separate fields of ‘design for the market’ and ‘design for social need’. This proposal is a response to a void identified by the two authors of both new thinking and theorising about social design, and the need of teaching future designers how to tackle social needs. Considering the two design fields, the Margolins assume a much less divisive positioning than Victor Papanek, whom they quote in their essay. In this sense, they project an idea of social design as complementary to market design (2002: 25). Set as an alternative agenda, their proposal is meant to take the purposes of both design fields (making products and responding to people’s needs) as the two ends of the same design practice, rather than placing them into two separate working spheres. Thinking and operating from within a social paradigm, the authors claim, may reinforce the value, the power and the recognition of design work (2002: 28).
The researchers initiate their discussion by acknowledging the steady development of models and theories for industrial design, whereas by contrast few efforts have been made to come up with similar improvements in social design (2002: 24-25). Therefore, they borrow theories and processes from social work (Sylvia Margolin is a social work scholar) to come up with a framework for the design field. Describing a six-stepped model of practice followed by social workers, the authors advance a few options as to how designers might be engaged in comparable problem-solving processes. Their essay identifies a number of domains that impact human functioning and call for socially-oriented intervention. To be able to situate design within this agenda, it narrows down to focus on the physical/spatial domain, which includes artefacts, urban structures, constructions and systems. The advantages of socially-oriented design interventions are illustrated with a hypothetical and a real-world case study. In both examples, which depict two challenging scenarios, Victor and Sylvia Margolin highlight the positive contributions that might be achieved with the design approach specifically (2002: 26-27).

To encourage new contributions on this subject, the authors challenge designers to find collaborations beyond their usual scope of action, namely with other professions. In doing so, designers might find ways of creating products for the market that are not just for sale, but also socially responsible. Nevertheless, research within this field is imperative to provide more evidence on the contributions of design, and an extensive collection of social design case-studies would help to support this knowledge on concrete examples of significant work. Accordingly, the research agenda proposed by the Margolins outlines different methods with the aim of broadening the scope of social design intervention, ranging from ample contexts to more circumscribed systems: survey research and interviews, content analysis of archival data, participant observation, and practice-based research (2002: 28). The essay concludes with the acknowledgement of a lack of specific academic training for future social designers, and mentions private initiative as an example of work that ought to be conducted to propel the social design agenda (2002: 29).

Apart from the Margolins’ essay, design literature offers a steady development of the notion of social design within the last 50 years. Victor Papanek’s earliest account of the concept, under the designation of ‘responsible design’ (1972), is the result of his reflection on the (negative) environmental and social consequences of design practice. An industrial designer himself, Papanek was referring mostly to product design, which he accounted for the global excessive, irresponsible consumerism, leading to both social and ecological problems (Papanek, 1985: 103-115). His provocative claim, setting socially responsible designers against the commercial market, initiated the emergence of either continuing or divergent perspectives on the subject. Three decades later, Victor Margolin acknowledged the contributions of Papanek by opening a discussion on social design and by proposing the kinds of social products designers might create. However, as explained previously, Margolin countered the arguments of the industrial designer by suggesting that meeting both the people’s needs and those of the market is not an incompatible task (2002: 25, 27).
Social design and sustainability

Social design was taken forward in 2009 by Alastair Fuad-Luke within a broader discussion on design and sustainability. In his book *Design activism: beautiful strangeness for a sustainable world*, the scholar draws from the Margolins’ 2002 essay, and expands their understanding of social design towards a framework of design for sustainability. *Design activism* provides concrete examples of projects and actions that may inform the crucial ‘compendium of case studies’ claimed by Victor and Sylvia Margolin (2002: 29) to strengthen and to validate the role of design in ever more challenging scenarios. Hence, Fuad-Luke advances the practice of social design as an effective response to current issues of sustainability and ethics of consuming (2009: 154). He also identifies local-global tensions as key opportunities for a socially active design intervention. According to the scholar, these tensions are determined by climate changes, dominant economical models, production and consumption demands, as well as social inequities.

Social design is therefore presented by Fuad-Luke as a collaborative design process that enables change in such complex and challenging contexts (2009: 55-72).

Complementary to this principal literature, other works have attempted to situate social design as a particular expertise, either theoretically or through practice. Aiming at clarifying the meanings and use of the term ‘social design’, researchers Inês Veiga and Rita Almendra advance three main dimensions within the practice or materialisation of social design – survival, citizenship and politics. These dimensions are illustrated respectively with product design for developing countries (survival), the design of spaces for collective use (citizenship) and service design for public institutions (politics). For a better understanding of how these problematics are tackled under the framework of social design, Veiga and Almendra particularise the practitioners (individual or in groups), as well as the projects conducted internationally under each categorisation. A significant finding, they only track one Portuguese designer entitling herself as a social designer (Susana António), and actually pursuing social design as her main research and practice-based activity (2014: 7-10).

Drawing from appropriate technology and hence adopting the designation ‘appropriate design’, scholar Dean Nieusma identifies five key themes informing his working theory of social design: universal design, participatory design, ecological design, feminist design and socially responsible design (Nieusma, 2004: 13-24). Nieusma’s concept of ‘appropriateness’ can be linked with Nigel Cross’ ‘designerly ways of knowing’, as will be detailed below.

Social design is presented as an important approach within this thesis because it presuppeses a great level of commitment from the designer. The links that can be established between social design and the particular context of the Douro wine craft lay also in the dual characteristics of wine labels as mandatory and cost-effective artefacts, as will be demonstrated in Chapter 4.

All these elaborations suggest the use of particular design methods or, indeed, a level of expertise and participation that is hardly applicable in contexts where design intervention is seen solely as a cosmetic, non-strategical resource, which is the case of the Douro. However, by reflecting on how design enables sustainable growth and responds to both the constraints of the regulative system and the demands of the
market, they return us to the meanings conveyed in the earliest views on social design: by acknowledging that the essential difference between social design and design for the market lies in the priorities, rather than the methods (Margolin and Margolin 2002: 25).

3.3.2 Wicked Problems in Design Thinking

The term ‘wicked problems’ was not coined by Richard Buchanan, but in his comprehensive 1992 essay he relates the concept with design practice and design thinking in four typical areas of design intervention. Two of these areas, ‘symbolic and visual communications’ and ‘material objects’, concern the main focus of this research. Buchanan does not focus on specific issues within design, but rather explores the broader picture of what makes design work. ‘Wicked problems’, which are here presented as problems commonly addressed by designers, determine processes as well as solutions which are not so easily understood, causing different problems of communication. Therefore, Buchanan’s theory offers some useful insights regarding both the challenges posed by design constructs and anticipating difficulties in its validation, be that in the academic or the professional world.

Buchanan introduces the theme by explaining how design has evolved in the 20th century from a trade-related activity to a new liberal art, which has pulverised into a range of specialised studies (1992: 5-6). He presents design thinking as an important integrative discipline due to this fragmentation of design into different subject matters. John Dewey was the first scholar concerned with the study of design as a new liberal art, i.e., by integrating useful knowledge and innovative thinking. Dewey’s observations on the relationships between art, science and practice led him to explore the concepts of science as art, or technology as ‘the art of experimental thinking’. In his extensive definition of design, understanding how design thinking works is imperative to make the process of cooperation and production more effective and meaningful. Despite the criticism of his contemporaries, according to Buchanan, Dewey’s concepts are fundamental for understanding the role of design in contemporary culture (1992: 6-8).

Buchanan identifies an enduring problem of communication between design and other academic fields. According to the scholar, this leads principally to misunderstandings surrounding the role of design in contemporary culture, as well as a lack of intelligent, innovative practices. Carrying these observations further, he reflects on the benefits of the public’s general understanding of design, namely how it might result in a stronger engagement of designers with problems of everyday life. Consequently, he enunciates the four broad areas where design might operate: symbolic and visual communications, material objects, activities and organised services and complex systems or environments for living, working, playing and learning.

Buchanan’s view helps us to understand why the world’s complexities allow for mindsets and solutions from design that escape the conventional or more expected approaches. Issues around sustainability, for example, usually arise in situations of conflict, that cannot be easily framed or addressed within ‘simple’ or straightforward solutions. I would argue in this thesis that this is the case of the sustainability of the Douro wine craft.
The theoretical framework helps to understand the likely implications of embeddedness and disjunction in the Douro dry wines’ craft. Yet this choice of methodology may also impact the study’s approach, discussing the role of design, which is another key argument of the dissertation. The problem raises specifically as to how the value of local products might be enhanced with the contribution of design, within a sustainable perspective.

Identifying the Douro as a vulnerable craft has been essential to understand the need for design (as a valuable local resource) and for how designers may be engaged. Driven by contextual or historical phenomena and the meanings generated by the global flows that influence the construction of identities, the theoretical framework has enabled a holistic understanding of the Douro wine territory as both an embedded and a disjunctive scenario, where value that may be added to local wines is crucial towards the sustainability of the whole environment.

What is implicit in this analysis, is that most of the difficulties and complexities within the field cannot be eradicated. In the perspective of design, they embody what some authors define as ‘wicked’ problems, which in this case unfold as questions that are difficult to frame, stakeholders with different viewpoints and conflicting values, as well as an entangling, complicated production system (Buchanan, 1995; Fuad-Luke, 2009: 142). As suggested by the frameworks of embeddedness and disjuncture, the great asymmetries of the Douro territory require the consideration of conflictual hypothesis. However, adversities and complexities may be tamed or become part of solutions.

Designers, with their particular skills and competencies, are able to bridge oppositions and to propose and articulate visual representations (even when the latter are built on contrasting elements), without necessarily flattening, softening or subsuming representations. Under demanding constraints, they are trained to envision equilibrium amongst difference, both as facilitators and as the creators of artefacts, systems and visual communications (Cross, 2001: 5; Manzini, 2009: 451). This ability is apparent in the multimodal features of wine labels, as evidenced by the case studies examined in Chapter 4.

The perspective outlined above informs this study’s proposition as an ‘open’ form of social design, namely advancing the discussion of how designers might intervene, within the craft, with socially responsible work, i.e., creating products for sale while emphasising the cultural value and meaning of place of origin, genuineness, and difference. Thus the collaborative approach that is here proposed, requiring the participation of key stakeholders (Fuad-Luke, 2009: 141-142), finds its most solid support in both the historical/sociological/oenological accounts that are discussed in Chapter 2 and in a form of socially responsible design that will not consider that meeting the needs of the market and those of local communities is an incompatible task (Margolin and Margolin, 2002: 25, 27).

3.3.3 **Designerly Ways of Knowing**

‘Designerly Ways of Knowing’ is a central notion in this study, in the sense that it supports both the framing of the main problems and a fundamental perspective regarding the overall approach of the research. Scholar and researcher Nigel Cross articulated the expression ‘Designerly Ways’ first in an article published in 1982. This framework builds on what the scholar considers to be a sound knowledge
that is specific to design thinking, design acting and designers’ own understanding of artefacts. The ‘designerly’ knowledge is thus gained from both design practice and the distinguishing culture of the discipline. To explore this idea, Cross has detailed what is specific to design knowledge, and what is specific to design compared to other scientific knowledge. After its first publication, the academic has continued to update the pivotal concept in two subsequent writings – an article (2001) and a book (2006).

The 2001 paper begins with a brief review of the historical concerns with the relationship between design and science, and seeks to clarify three different interpretations of this concern: scientific design, design science, and a science of design. The paper then develops the view of ‘design as a discipline’, based upon a science of design. This discipline seeks to develop domain-independent approaches to theory and research in design. The underlying axiom of this discipline is that there are forms of knowledge peculiar to the awareness and ability of a designer, independently of the professional domain of design practice. The final part of the paper suggests the ways in which this discipline of design, and the understanding of ‘designerly ways of knowing’, is pursued through design research.

In the book edition of 2006, published by Springer Verlag, Cross revises and edits a collection of key lectures. These essays explore the nature of design activity and expertise, namely the evidence for design cognition as a particular and essential aspect of human intelligence. The designerly way of knowing is not only embodied in the process of designing but equally the products of design also carry knowledge. The earlier article by Nigel Cross lays out an argument for and challenges our thinking about a neglected third area of education: Design. In general, the two dominant cultures of education are the sciences and the arts, broadly defined. The article Cross has published in the early 80s was influenced by a project on ‘Design in general education’ developed by the Royal College of Arts in the late 70s. However, it highlights several issues that remain highly relevant today.

Cross points out the differences between the three cultures of science, the humanities and design to distinguish what is particular about the latter and to come up with a clearer definition of the discipline. Therefore, he starts by clarifying the phenomena studied in each culture: the natural world in science; human experience in the humanities; and the artificial world in design. He also enumerates the methods used in each culture: controlled experiments, classification, analysis in science; analogy, metaphor, criticism, and evaluation in the humanities; modelling, pattern-formation, and synthesis in design. Finally, he lists the values within each culture: objectivity, rationality, neutrality and a concern for truth in science; subjectivity, imagination, commitment, and a concern for justice in the humanities; practicality, ingenuity, empathy, and a concern for ‘appropriateness’ in design.

Depending on its field of operation, design can certainly adopt most values of the other two cultures, but it is the task of being suitable, pertinent or functional which defines the discipline’s particular approach.

Today, the boundaries between these three cultures can be blurred. Indeed, the theory of disjuncture, which has been defined in the literature review and explained in the previous section, has stressed the importance of acknowledging and addressing the fluidity of boundaries within certain contexts, which
is the case of the Douro wine craft. Therefore, it is imperative to consider the complexities of the context which bring about influences and pressures into the design process, leveraging onto visual communication and design artefacts.

However, what Cross tries to point out by comparing design to other cultures is that there are ‘ways of knowing’ embedded in the process of design that are different, and ought to be tackled differently. Thus, for Cross, science is conducted within a process of linear analysis to find a solution or specific outcome, whereas a designerly way of knowing is a process of reasoning and iteration. In the present study, this process will be synthesised into a central principle (territorial branding). This principle is advanced as a general proposition which may, in practice, be subject to interpretations and translate into different visual outcomes.

The designerly ways of knowing embody much more than the process of creating objects focused on form and materiality – which is the narrow view of design formerly identified in the Porter report. Cross has coined this definition to express that the products of design also carry knowledge. If the stakeholders offered ways to understand the process of communicating wines through wine label design, they might also have more appreciation for this works (and its materiality) and might perspective design as a relevant resource for problems that exist in the wine world.

Situating the main research problem around the need for dialogue and debate also raised the question of why designers might be ideally placed to set such a task. It challenges a more traditional view of design’s professional acting, here defined as the expected and staple design approach (Frascara, 2004: 189). On this subject, Cross is also followed by Ezio Manzini, on the idea that designers are particularly able to play a ‘different’ role due to the discipline’s intellectually independent culture (Cross, 2001: 5; Manzini, 2009: 451). Both scholars champion that designers may not act solely as makers of tangible, isolated products but also as professionals prepared to bridge different players and to articulate ‘systems of products’ towards a common vision.

In Chapter 4, Cross examines the ‘creative leap’ (2006: 43) as an important aspect of the designerly knowledge. Whilst not all design work needs to be creative (information design, sign systems, examples of industrial design, etc.), he asserts, in some areas or for specific projects, creativity is a crucial aspect of the process, especially when it allows to generate added-value. Creativity in design has many facets, and although it might be seen as a highly visible feature, it often emerges from subtlety, craftsmanship and inventive ideas. Therefore shifts, improvements, adjustments, tweaks and comparisons are all common means of acting creatively within design, adding to the cliché of a sudden vision which is commonly associated with the designer’s routine.

Cross examines the five procedures by which the creative leap might occur within a design process: combination, mutation, analogy, design from first principles, and emergence. By proposing a more detailed research into the designers’ reasoning, he attempts to establish a detachment from the idea of sudden illuminations, or purely intuitive processes, which are often emphasised in the literature as the triggers of design creativity. Similar procedures have been explored by McAlhone and Stuart (1996)
that inform the design process and define the importance of ‘witty thinking’ within the practice of design, namely how that wit is constructed, and the value it may add to design projects. Cross investigates these processual approaches with two main purposes: to shed light on the particular knowledge that prompts the creative leap; and as a means to support further research in the field of artificial intelligence (where AI attempts to mimic the creative process).

In this thesis, the links with artificial intelligence are irrelevant. However, understanding the practice of design in the light of this framework and these creative methods may help to clarify what is specific about the designerly knowledge and how it helps to build added-value. Therefore, the case studies’ discussion will focus on the ways these procedures have shaped each project, with the aim of casting light on the design process and of highlighting the significance of a more engaged design involvement. There is, however, a degree of subjective interpretation that may be argued in such an analysis. To examine the five procedures at work, Cross has studied an example which has been fully recorded throughout its development. The conception of an innovative industrial product was assigned to a team of designers, and the different stages of the creative process have been carefully documented. Despite this proximity with the design process, Cross adverts that only an in-depth cognitive record would allow to verify his understanding.

In the present thesis, the analysis undertaken is even more distant from the actual processes. An interpretation of the data collected and then combined was produced in regard with the case studies. This interpretation is acknowledged as an *a posteriori* examination of the design processes, guided by the study’s methodology, and will be presented as an original contribution of the study. This interpretation has not been suggested by the designers, the winemakers nor other relevant actors whilst collecting information and registering personal accounts. It emerges from the triangulation of the design approaches with the collected data. As such, it is proposed as a knowledge contribution to the field.

Cross attempts to demonstrate that these procedures inform the creative leap, and that the latter is the cognitive act that will enable the connection between problem and solution. It is important to stress that these procedures are not necessarily isolated, and they can be applied in combination with each other. However, as Cross has stated (2006), during the creative process it is usually possible to identify a method or procedure that stands out, triggers the core concept or solution, and guides the process until its final outcome. Cross claims that these approaches inform the specific knowledge that enables designers to move one step further the mandatory, the adequate, and the coherent responses to deliver added-value propositions, as well as outcomes that go beyond expectation.

Concluding with a summarised a definitio

Concluding with a summarised definition, the ‘designerly ways’ of knowing are the witty procedures that generate a distinguished outcome, capture the consumers’ attention, elevate the perceived value of a product or help a message linger in the memory (McAlhone and Stuart, 1996: 20, 23). Most importantly, allowing the design process to develop from within its specific knowledge can be rewarding in multiple ways: to the product, to its maker, to the craft, and to the consumer. In this study, a clear connection was found between the five procedures described above, and the examples that were being examined.
3.4 Methods

Conducting qualitative research has allowed cast light on particular phenomena, such as the case studies presented in Chapter 4. Considering state-of-the-art wine labels of DOC Douro wines, representativeness is considered problematic in regard with the craft’s sustainability, as demonstrated in Chapter 4.1. In contrast, eloquent and outstanding examples are exposed as cases of promising visual communication strategies. Therefore, rather than pursuing representativeness, which usually emerges from quantitative inquiry (Maxwell, 2012: 233), the study will explore meaningful atypicalness, drawing from contextualised knowledge. In particular, a more extensive examination of the five distinct cases, provided an in-depth understanding of the processes that led to their specific outcomes, especially considering the complexity of the settings involved. Interwoven with the design approach, which has been outlined above, the case studies’ analysis has allowed me to highlight the importance of design within these processes, situating its role in the construction of added-value. The analysis also contributed valuable insights to inform a proposition.

As a qualitative mode of inquiry, this study relies on triangulation, which is the principle of integrating data from different methods and sources of information: in this research, beyond the information collected from the literature review, the methods included open-ended interviews, purposive sampling, and the construction of case studies. According to Maxwell (2012: 236), this strategy reduces the possibility of producing limited or biased conclusions as a result of using only one specific method. Thus, the resulting argumentation may be better assessed or validated.

The study’s approach to fieldwork, interviews with key stakeholders, winemakers, and designers as well as the collected artefacts is interpretive and exploratory, as is the discussion of case studies. From the outset, three key informants were identified (Cayatte, Pereira, and Amaral) to discuss the central topics of the thesis, and to converse about – respectively – the path of Portuguese design, the Douro history, and winemaking in the Douro (including the region’s appellation system. The aim of these initial conversations was to provide fundamental references and topics that might orientate the research towards significant actors, developments, and design work.

From there on, the research branched out into a more focused literature review, fieldwork, further interviews with stakeholders and designers, data collection and visual analysis.

3.4.1 Purposive sampling

The choice of the purposive sampling method provided crucial information through the careful selection of particular projects, people, and outcomes. This strategy was particularly useful for the examination of specific design processes that illuminated the main arguments of the study.

Choosing particular cases instead of representative ones implied thinking through what examples the study might benefit the most from. This logic considers that in specific settings, such as the DDR, the average case represents ‘the problem’ whereas deviant, information-rich examples may illuminate propositions of positive change. Purposive sampling allowed to establish meaningful comparisons and differences between the examples, which is a common tactic in multi-case qualitative studies (Maxwell, 2012: 235).
The case studies were selected based on the following criteria: a deep engagement of design; the quality of the resulting outcomes; and the distinct design approaches evidenced by each case.

A first sampling of existing brand image/wine labels within DOC Douro wines was first made to acknowledge the visual strategies used within the craft. This selection was made by crossing three sources of data:

- The ‘Galaxy’ Chapter in António Barreto’s *Douro – Rio Gente e Vinho* (2014: 235-255);
- The encyclopedic account *Diccionário Ilustrado do Vinho do Porto*, by Manuel Pintão and Carlos Cabral (2014);
- The IVDP’s selection of producers/brands representing the Douro at PROWEIN 2015 (the international wine fair in Frankfurt).

By crossing the information found within these sources, an account of significant actors within the craft was provided, independently of their size, seniority or provenance. The selection criterion was therefore qualitative, rather than quantitative. This sampling was constructed with visual data collected by observation: in books; on the internet; at the producing locations in the Douro; on supermarket shelves; or on display in wine fairs. This data allowed to build a visual ‘catalogue’, presented in Appendix D, which in turn enabled the first visual analysis and categorisation. A survey was also conducted to find out which wine labels or visual identities had been developed by professional designers. The analysis resulting from this preliminary sampling allowed to identify recurrent strategies in the visual communication of contemporary Douro wines. These stereotypical approaches, which are consonant with the findings from the literature review, will be presented in Chapter 4.

The use of ‘deviant’ case sampling allowed to focus and detail the observation on special cases. The latter have highlighted outcomes of significance and a potential base for further propositions. This type of purposive sampling provides significant insight into particular phenomena, which in this case act as examples of ‘good’ design practice, as defined by Cross (2001). Therefore, the following criteria was sought to enable the final case study selection:

- Distinction: addressing different identities, scenarios and requirements;
- Innovation: novel ways to generate ideas by challenging existing mindsets and stereotypes;
- Socially conscious: respecting place of origin and reasoning upon different perspectives;
- Rigorous and professional: expertise in usage of form and materials, namely design and production.
3.4.2 Interviews

Because the interviews were open-ended, they often revealed more than was anticipated. As such, these conversations constituted one of the most valuable sources of information, particularly for disclosing the design process behind the case studies.

In a first stage, which was determined by the initial readings on the study’s broader topics, semi-structured interviews were conducted in 2014 with significant informers on the following subject matters: the history of the Douro wine craft, with Douro historian Gaspar Martins Pereira; winemaking in the Douro, the institutional role of the IVDP and how the appellation system works, with oenologist Bento Amaral; and the current context of Portuguese design, with former president of the Portuguese Design Centre, Henrique Cayatte. Although none of these conversations followed a very rigid path, the dialogue was driven by specific themes and questions, determined essentially by the gaps found in the literature that needed to be filled. Particular references, relevant people and projects within the Douro wine craft emerged in these first accounts.

The second stage of questionings, which focused on the case studies, was deliberately much more open because the aim was to collect stories, strategies and design developments which were essentially undocumented or unknown. The conversations were held with designers, winemakers, and other key participants within the design processes. Since the five focused situations happened more than eight years ago and the respective course of actions have not been recorded, the personal accounts of these crucial interventiens provided the closest possible testimony on the main procedures. These reports were then articulated with the factual data provided by the companies (e.g. registered brand names, vintage and release dates, technical information on the production, print files, etc.), the visual analysis of the artefacts, and the complementary/processual material (research, methodological criteria, experiments, unreleased propositions) also provided by the main actors to inform the final narratives described in Chapter 4.2.

These conversations aimed at providing a contextual outline of the projects and their original motivations, the relationships established between the designers and the stakeholders, the central concepts behind each project, the development of the design process and the final outcomes in the form of wine labels and packaging.

Numbered and factual data such as production quantities, the products’ price on the market, sales’ statistics, winemaking and design costs, turnover and other quantitative/financial aspects of the projects were consulted with the sole purpose of situating the case studies within the context of niche wines, and to provide evidence on the projects’ efficiency, profitability and sustainability. However, as stated earlier, the study’s methodology does not contemplate the analysis of economic data. Also, as the core arguments are focused on the design process and aspects of the visual communication, such analysis was not considered relevant for the main discussion.

Complementary conversations were also conducted with key people suggested by the different interviewees: Dorli Mühr (Public Relations and manager of the Douro Boys and The New Douro
collectives), Alexandre Mariz (viticulturist, Symington Estates/Douro Prime), Dominic Symington (joint CEO, Symington Estates), Tim Hogg (scholar and Director of Research Centre in Vila Real); wine shop managers, in the UK; Celestino Fonseca (designer and manager of artisanal chocolate house/brand Equador); Susana Marques (Setepés). These consultations provided additional information which helped to understand particularities within the craft: viticultural practices, the winemaking calendar and characteristics of the Douro wines; the relationships between different actors within the DDR – regulators, producers/wine companies, and academia; the image of the Douro in the external market; strategies for seeking added-value through design intervention.

The interviews and observations in the field were conducted between 2014 and 2018 at different times of the year. The dates of the interviews were determined by the participants’ availability. Other specific dates were chosen to observe significant periods of the winemaking calendar (harvest, maturation, wine fairs, communication and promotion, wine label production, etc.).

To ensure unbiased accounts of the events, the interviewees were asked to explain how the projects developed, and to provide their insight on all the aspects they remembered regarding the unfolding of the design project. Therefore, the links that were made with Nigel Cross’s designerly framework describing the creative leap were established *aposteriori*, as part of the study’s analysis.

Given the personal and sometimes passionate involvement of the intervenients with the projects, as well as the lapse of time which went past since the original productions took place, their description of events were not always objective and sometimes lacked factual rigour, but they were acknowledged and integrated in the narratives as relevant and genuine accounts.

An additional measure to prevent researcher bias, the topic of territorial branding was rarely mentioned in the conversations. It was woven into the conversations only where it was considered pertinent, or to perceive the awareness and relevance of this strategy within the broader craft.

In sum, the interviews contributed to identifying the following aspects:

1. The authors and intervenients in the design process, as well as their mutual relationship;
2. The background and motivations of the design approach;
3. The development of a core concept and its materialisation into different visual elements;
4. The procedures behind the design process, as well as its progression;
5. Relevant artefacts and visual material for analysis;
6. The impact of the resulting outcomes.
3.4.3 Visual analysis

The methodologies used by researchers for visual analysis of design artefacts are commonly adapted from the humanities, social sciences and linguistics. This framework for critical reflection within design studies, presented by Victor Margolin in *Design Discourse: History Theory Criticism* (1989), has been very influential in the last three decades. The benefits of grounding design research in the methods of structuralism, poststructuralism, representation, feminism and semiotics, amongst other theories, were presented by Margolin as a way of combatting the understanding of design as a minor subject to both academia and the general public (often in comparison with art and architecture), and to reinforce research and intellectual debate in design fields (1989: 8).

Similar approaches were found in marketing studies (Appendix E), although this specific literature acknowledges design as a ‘moderator’ of other activities, such as advertising or management, and not as a discipline in its own right. Amongst these works there is general agreement that drawing from scholarly knowledge is a strategy that ensures academic validation.

However, recently, this theoretical approach has been questioned or reframed by a number of authors because it tends to except elements that are central to design practice, such as typography, ornamental form, visual diagrams, or the material attributes of objects. Designer and educator Leslie Atzmon, for example, objects to the use of verbally based theory to describe design artefacts, which – she claims – are essentially visual forms. A practitioner herself, Atzmon regards theoretical methods as a source of disconnection between design practice and contemporary visual culture studies, as well as a widespread prejudice for the written over the visual. Therefore, opposing the need to ensure that visual research is considered ‘intellectual’, the designer proposes visual rhetoric rather than verbal rhetoric as the appropriate tool for the interpretation of design artefacts (2006: 2). For Atzmon, Nigel Cross’s ‘Designerly ways of knowing’ (2001) is also an important reference for defending the strengths of design culture derived from practice.

Like other design artefacts displaying imagery interpretations of different concepts and particular identities, wine labels are often composed by visual narratives and elements of visual rhetoric. Such elements are often discussed within a linguistics-based theory of communication, which is the case of the few design studies mentioned in Chapter 2.6, but that will not be the approach followed in this study. Instead, the discussion of visual communication strategies will be drawn from the practitioner’s experience and with a ‘designerly’ oriented point of view. The accounts suggest that the mindset behind the design processes or the choice of certain visual elements bear similarities with the ideas that have stimulated the development of the wine projects. This is not to say that a traditional historical analysis focused on iconography is not important, but the form of visual analysis presented in Chapter 4.2 will also offer an insight that fields other than design might not be able to interpret. This analysis also suggests that wine labels are shaped into different interpretations according to influences and procedures which are specific of the design culture, namely the constraints the designers have to work within, and their dependence on the collaboration or approval of different stakeholders (Atzmon, 2006: 5).
3.5 Summary

This chapter provided insight into the overall methodological approach for investigating the study’s main research problems, which are the lack of symbolic value in the visual communication of Douro’s dry wines, and the poor professional participation of designers within the wine craft. It has clarified the qualitative and mixed methods approach of the study, establishing the interpretive nature of the research. The study’s methodological approach, which relies on the triangulation of both theories and methods, connects to the research problems in different ways, namely by highlighting the relationships between specific solutions and the cultural heritage of the DDR, by emphasising how certain constraints were determinant in the final outcomes, and by clarifying how the creative processes developed to generate new forms of knowledge.

The methods of data collection specifically used were the literature review, surveys, interviews, observation, photography, and archival research. To inform the case studies, the data was gathered and into combination narratives which focus on the aspects that were thought to be more relevant towards the discussion. The data compiled and referred to in the literature review, as well as the survey in Appendix D provided an anchor on which to map the issues that were being evaluated.

In a conclusive remark, it is important to stress that qualitative-interpretive research pressupposes subjective variations. Due to the nature of the methods employed it is acknowledged that the study does not offer a representative perspective of the DDR. It is debatable whether a similar analysis might be conducted with further examples or in different Portuguese viticultural contexts to test and to validate its significance. By selecting the present methodology informed by the frameworks, approaches and methods described above, I have accepted its inherent limitations. The latter may emerge from non-replicable inquiries, and from the complexity of the analysed data, which can be subject to different interpretations. If further studies introduce alternative understandings, guided by a different choice of methodology, they might develop into different arguments or hypothesis (Maxwell, 2012: 233).
4 The expanded wine label: case studies and proposition

4.1 Introduction
Considering that for most consumers wine labels are the only visible means of communicating a wine’s character (Keers, 2014: 90), it could be argued that in the contemporary and highly competitive global market, the wine’s identity – and its perceived value – is in large part defined by what wine labels are able to transmit.

The visual features of a wine label – functional, symbolic and aesthetic –, as well the narratives they convey through printed paper or directly painted onto the glass are an important extension of the wine’s identity. Hence the significance of these design artefacts: beyond their functional role within the practicalities of the trade, they are not just ways of selling a commodity, but means of creating aesthetic, symbolic and economic value as well (Appadurai, 1986a: 4, 56). More importantly, what is argued in this thesis is that the specific ways of building aesthetic and symbolic narratives through wine labels are forms of added-value, and may release the producers from having to compete on price.

This chapter aims to cast light on how this value may be constructed through the perspective of design, and in particular through the design of wine labels.

Unlike other wines in the world, Douro wines cannot be traded in bulk. Certified wines within the DDR are legally obliged to be bottled and labelled in Portugal. As described in the literature review, this measure was introduced by the Portuguese state in the 1990s to prevent fraudulent conduct and adulterations of the wines, to protect the Douro appellation, and to help raise the value of Douro wines. As a consequence, for wines that are traded and certified within the DDR (and entitled to bear the respective warranty seal), wine labels are not optional, but legally required artefacts.

The mandatory information, as well as the restrictions to the visual display of this information on wine labels have been specified under strict regulations (Appendix B).

Considering the above, it is of uttermost importance that designers, beyond their technical skills, acknowledge the regulations of the IVDP, because they can significantly impact upon the design work. Accomplishing these requirements in a small surface with technical rigour and visual eloquence, as different authors within this study have remarked, requires expertise and a solid knowledge of the processes involved (Guichard, 2000; Caldewey and House, 2003; Keers, 2014: 93; Mihranian, 2016; Salazar, 2016; Aires, 2016).

The certification and control of Douro wines, as well as their wine labels, is conducted by the IVDP. It is a complex sum of procedures entailing all the processes involved in making and trading wine, from the soil to the bottle. In the inner territory, the IVDP monitors the exact location and setting of the vineyards, as well as the viticultural practices and processes of vinification, which must be in accordance with the regulations and within the boundaries of the DDR. The exact number of bottles for sale is also controlled.
The complete process, including the submission of wine samples for laboratory analysis, can take up to three or four months. However, the specific process of wine label approval, which is the one affecting the work of designers directly, occurs within a turnaround of one to three weeks. For the designers, it is an important aspect to consider. First, because the IVDP inspection will add time to the production, namely before the printing process; second, and most important, because the Institute can disapprove a specific design, as reported in Chapter 4.2.1. This will imply corrections, adaptations or even the complete redesign of a wine label (Amaral, 2014; Quevedo, 2015).

During the present research, when conceded the opportunity to shadow the process of label approval at the IVDP (Appendix B), I was told that the difficulties regarding the timings of label approval are mostly due to the staff’s limitations, as well as the intricacy of the process which needs to meet a great number of legal constraints. During the busiest periods, particularly when producers are bottling their wines, preparing for shipping, and aiming at presenting their wines at the international fairs, the wine label department team at the IVDP in Porto, constituted by three professionals, must often handle and approve an average of 150 wine labels per week. While conversing with head supervisor Alfredo Silva at the IVDP, I was impressed by the efficiency of their procedures, considering the actual limitations of the department. For example, the fact that metric verifications of typographical components must be produced optically, against the screen, with a ruler. The Institute does not employ digital tools nor specific instruments to conduct these inspections. The latter might be pursued with digital optical comparators, which are special instruments used by the industry to verify mandatory information or measurements of products.

Another angle on this discussion suggests that certain criteria for the approval of visual identity in the DDR wine labels is debatable, particularly in the light of the current practice of design. This is the case of the ‘prohibitions’ article, a specific topic within the regulations concerning the visual presentation of Douro wines. The article specifies the particular visual symbols or representations, such as historical and religious figures, that cannot be used; however, the reasons for the restrictions are not explained. Further on in the same legal decree, a much more vague requirement refers to the use of words and images that may compromise the ‘prestige’ and the ‘good name’ of the DDR (Appendix B). Reportedly, this was the article that motivated the refusal of the wine label from Quinta de Tourais, an episode resumed in Chapter 4.2.1. (Amaral, 2014; Salazar, 2016). Considering the relevance of this subject towards the present study, I sought the opportunity to discuss this subject during the meetings and presentations conducted at the IVDP, and the resulting debates were both challenging and promising (Appendices F and H). Alfredo Silva, the head supervisor of label approval at the IVDP, admitted that the staff at the Institute may not have the appropriate professional preparation to discern on visual identity and design, nevertheless they are required to comply with the regulations. The position of the IVDP has been one of openness, interest and concern towards the debate of meaningful, informed contributions.
On a different perspective, it was important to build an initial panorama of the Douro wines’ imagery in order to draw the first critical observations. Examining the evidence of the initial survey (Appendix D) enabled to identify and categorise state-of-the-art strategies, as well as atypical strategies and criteria which set the base for the subsequent selection of the case studies. Hence, the initial categorisation has provided an important framework against which the case studies can be compared and analysed in parallel with the existing literature.

To assess how the Douro wines communicate as they compete for global attention, the state-of-the-art communication strategies that were observed throughout the sampling in Appendix D were categorised and described as follows:

1. **CULTURAL MISREPRESENTATION**
   Culturally misrepresentative examples are more controversial they can be misleading. When observed in the selling context it starts ‘merging’ into other territories (namely Spanish regions), loosing its particular identity

2. **HISTORICISM, NOSTALGIA**
   Nostalgia and historicism are recurrent (stereotyped) branding strategies; Visual elements may bear a relation to the territory; reasons for the use of Old World clichés have been identified, but the strategy fails to tell particular, authentic, interesting stories.

3. **GLOBAL POSITIONING**
   Global examples are usually subsuming and they undermine the importance of the product. ‘Global’ wine labels would work well regardless of the wine inside the bottle. They could have been made anywhere. The link between the visual elements and the territory is either vague or completely absent.

The counterpointing strategies that have been identified as serving the purpose of territorial branding and added-value communication, also illustrated by the inquiry’s case studies, were the following:

1. **CROSS-CULTURAL REPRESENTATION**
2. **HERITAGE/ REFERENCE / INNOVATION**
3. **TERRITORIAL POSITIONING**

Returning to the thesis’ central arguments, and using demonstrative examples, this chapter will seek to evidence the positive contributions of design within the Douro wine craft. The use of the word ‘expanded’ in the chapter’s title is significant, and relates to a central claim within this thesis: that wine labels are underestimated powerful design artefacts, which extend their commercial purpose beyond a primary (and mandatory) informative function, and constitute a cost-effective form of
innovation and added-value. In particular, as wine labels transmit the distinctive identity and cultural heritage of Douro wines, they may contribute to the craft’s sustainability (Appadurai, 2013; Dilnot and Margolin, 2015).

The idea of an ‘expanded’ object also speaks to the various dimensions often implied in the assignment of designing a wine label: the graphic art, the visual narratives, the technical/legal requirements, and the complex process of production, including one to eight-colour printing; paper or silk-screening; embossing, foil stamping, spot varnishing, or die cutting.

Furthermore, as Chapter 4.2 illustrates, ‘wine label’ briefs might often imply the development of a constellation of objects or features such as corks, capsules, packaging, websites and other analogic or virtual communication.

The study might ask what would then make a ‘good’ wine label. As a work involving a great degree of subjectivity, empathy and aesthetic fluctuations, there are no absolute certainties in design. Yet principles and directions ought to be considered (Cross, 2001). In this sense, a ‘good’ wine label design should:

1. Display with clarity what the consumer wants to know;
2. Display what the consumer might not want to know yet is mandatory information;
3. Present the contents of points 1 and 2 with rigour, as well as with formal and conceptual coherence;
4. Use adequate and good-quality materials and resources;
5. Incorporate visual signs of semantic and aesthetic value, which respect the product and its context;
6. Disclose an overall outcome that goes beyond expectation.

Accomplishing all these requirements with eloquence is the ultimate challenge of every wine label assignment. Designer Chuck House (Caldewey and House, 2003: 27) argues that both the processes of making wine and designing labels follow certain recurrent patterns, but the way in which each one deviates from that pattern, offers the clue to its distinctive identity. House adds that due to the growing complexity and refinement of print production, designing wine labels today may also require exceptional technical expertise. Finally, Guichard (2000: 365) recognises that the design process or the transformation of concepts and regulations into a limited, yet accomplished surface demands laconic, ingenious and sophisticated work.
4.2 Case studies

4.2.1 Quinta de Tourais: reinterpreting the tradition

Contextual outline
Quinta de Tourais is located close to Régua, on the southern margin of the Douro (Appendix A), and was established in the 12th century, initially as a property of the nearby Salzedas monastery (Fig. 4.1). The exact origin and meaning of the designation ‘Tourais’ (pronounced taw-raish) is not clear. In a traditional rural fair, toural (singular for tourais) was the area where bulls and other domestic animals were traded. The term can also designate a sort of burrow for wild hares (Costa, 2004: 1513), which are a rather appreciated type of meat in this region. Fernando Coelho, the winemaker who currently runs the estate’s eno-tourism project with his sister, Manuela, said the word’s phonetics are so close to ‘touro’ (bull), that tourais is often mistakenly understood as ‘the bull’s place’. The visual identity of the estate was created by Miguel Salazar (he is also creative director of the wines’ global image).

Coelho’s grandfather acquired the property where he started growing grapes and producing wine. Later, he was joined by his son. Like most producers in the region, they made their living by selling grapes and wine (in bulk) to port wine traders.

Coelho studied and spent most of his youth 120 kilometres away, in Porto, where he joined a theatre group with some friends. When he decided to return to his birthplace and to live in Tourais, back in 1997, he realised he knew very little about winemaking so he set out to study oenology before producing his own vintages (Coelho, 2014).

Although port grapes are still produced within the estate and sold to Sandeman (owned by SOGRAPE), the winemaker claims that the port market is complex and less profitable; due to the strict regulations...
and to a trade practically controlled by a few big companies, small producers and growers find it hard to strive. Coelho therefore decided to dedicate himself to DOC Douro wines, which currently keep his business economically viable. He describes himself as a relatively small vintner, producing around 20,000 bottles a year (Coelho, 2014).

<table>
<thead>
<tr>
<th>DESIGN PROJECT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start date:</strong> 2003 (2001 vintage)</td>
</tr>
<tr>
<td><strong>Project manager/producer:</strong> Fernando Coelho</td>
</tr>
<tr>
<td><strong>Art direction and design:</strong> Miguel Salazar, Edgar Silva</td>
</tr>
<tr>
<td><strong>Curator:</strong> Paulo Vinhas</td>
</tr>
<tr>
<td><strong>Collaborators:</strong> Rayna di Nord (EUA), Arménio Martins (PT), Carsten Nicolai (DE), Pedro Tudela (PT), Luis Úrculo (ES), Mariana, a Miserável (PT), Júlio Dolbeth (PT), Paulo Nascimento (PT), Sam Baron (FR), David/Nicolas (LB)</td>
</tr>
<tr>
<td><strong>Assignment outlines:</strong> naming; visual identity; wine label design, illustration and packaging; curatorial project for Miura and Furia wines;</td>
</tr>
<tr>
<td><strong>Core values:</strong> Not defined</td>
</tr>
</tbody>
</table>

**Project overview**

The wine project of Quinta de Tourais rose from a history of companionship. Coelho hung around with his group of friends from Porto for a long time (he still does for that matter). They listened to the same kind of music – mostly experimental electronic and industrial rock of the 1980s – introduced by Paulo Vinhas, who ran his own alternative music shop in Porto.

Every year they would head to Barrancos, a village in southern Portugal, where a special breed of pig is traditionally kept. There, they would buy and slaughter a pig, bring the meat back to the Douro to prepare sausages, and smoke them in the traditional way. Everyone would have their share of the meat and sausages, which were eaten throughout the year. They would also get together to forage for wild mushrooms in the country. The meat, the sausages and the mushrooms where just gastronomic excuses for their joyful gatherings. Coelho would always bring his own wine, which was still unlabelled at that time.

The starting point for the current visual identity and wine label design occurred with the Miura project (detailed further below): one day, Coelho’s friends challenged him to produce wine with a commercial purpose, a brand name, and a proper label.

Paulo Vinhas’ professional activity, which was linked to cultural events and alternative music, facilitated connections with artists and designers. That is how he became the ‘curator’ of the wine project, otherwise a rather unusual role within the wine environment (Vinhas, 2017).

It also happened that some of the friends in the group were designers, e.g. Edgar Silva and Arménio Martins, who, in turn, introduced Miguel Salazar. An idea started gaining shape: Coelho would produce the wine while the designers developed a visual identity and the wine labels. That is how the wine project was born. As it was very spontaneous, the winemaker always thought there was no need for ‘professional’ briefs: his friends were so familiar with the wine’s character, they would certainly come up with the appropriate design. There wasn’t any pressure from the market, either; after all, this was just a wine to be enjoyed by a group of friends (Coelho, 2014).
Naming and registering the wine brands from Quinta de Tourais was a more convoluted process. When the first dry wines were produced, in 1999, Coelho adopted the estate’s name, Quinta de Tourais. For a new vintage, he attempted to register Torga, an allusion to the influential 20th century Portuguese writer from the Douro. However, the name was already in use, and therefore Miura was suggested. ‘Miura’ is the designation of a large and fierce bull from Andaluzia, bred specifically for bullfighting, and largely inspirational beyond that particular tradition (Hemingway, 1932; Shubert, 2001). Miura is also a tale from Torga’s 1940 Bichos, a book in which the writer expresses facets of the human nature through animals’ stories (Torga, 2002: 97). Finally, Miura works as a play of words with the estate’s name, i.e. Tourais. Exploring further a connection with the place of origin, Tourónio was registered to designate three dry wines: red, white and rosé.

In 2008, inadvertently, Coelho failed to renew the registration of Quinta de Tourais. At the same time, in southern Portugal, a very similar brand name was registered, preventing the Douro producer to use his own brand registration. Thus Furia (Fig. 4.2), which literally means ‘fury’, became a substitute brand name for the former Quinta de Tourais (Salazar, 2016).

![Fig. 4.2 The Furia range, design by Luis Úrculo](image)

**The design process**

When designer Miguel Salazar started working with Fernando Coelho, wines were not the producer’s priority. Coelho’s sister, Manuela, was making jams and preserves using the farm’s products, and it was necessary to create a brand image, labels and packaging.

Thus, the first visual symbol created by Salazar was the logo (Fig. 4.3): a full circle with a dot inside and a short straight vertical line, with a half circle and short vertical line below that. Salazar refers to the estate’s name as an olive varietal or a root, but admits the logo may have different interpretations, e.g. a tree, a glass, or the idea of an orchard. Further associations have been well received within the project. For instance, the designer mentioned a possible link with a German experimental rock band from the 1980s which Fernando and his friends enjoyed listening to (Salazar, 2016).
Eventually, the different meanings elicited by the estate’s ambiguous etymology were a rich source of visual references. As such, they were incorporated in the construction of its broad visual identity, which currently articulates meaningful visual elements other than the logo and the bull iconography, as will be explained below (Coelho, 2014; Salazar, 2016).

According to Salazar, the first approach to the project was rather conventional. The designer recalls that the first Quinta de Tourais wine labels, in paper, were copied on a home printer and thus practically artisanal (Fig. 4.4). Then, when Coelho started producing and selling more wine and needed to label a greater number of bottles, the technical problems began. Due to some lack of means, his labelling machine was not precise, and many labels were damaged or wrinkled when applied onto the bottle. This produced too much waste and often forced the winemaker to apply the labels by hand, which was time consuming and required much patience.
It was at this point that Salazar suggested the alternative solution of silk-screened prints. For a small production like that of Quinta de Tourais, this method proved practical and affordable. According to Coelho, when the first silk-screened bottles were delivered at the winery, they looked ‘perfect’ and ‘high-end’. He just had to fill them with wine (Coelho, 2014; Salazar, 2016). The designer, who had recently visited a silkscreen printshop, was well aware of the use of this technique to identify port wine, olive oil and branded glassware. Furthermore, he thought the process also mimicked the method of marking bottles by hand with stencil templates and white ink, an old tradition in port wine cellars. For these reasons, he did not hesitate to identify this project’s design approach as a ‘reinterpretation of tradition’ (Salazar, 2016).

![Fig. 4.5 The different aesthetics of paper and silkscreened labels for Tourónio DOC Douro](image)

The idea of having a long lasting label pleased everyone in the group, and worked very well. While the paper labels were very easily damaged, the silk-screened print is robust and remains (Fig 4.5). However, the designer remarks that the use this printing process has advantages and constraints which have to be addressed. On the one hand, using the whole surface of the bottle allows to explore original illustration layouts, for example the all-round motive created by Rayna di Nord for Miura, in 2007. On the other hand, the same feature implies a cut line which has to be concealed or incorporated into the design so that it does not look like an imperfection. Exploring the decorative potential of silkscreened wine labels, therefore, requires skilful and ingenious designs (Fig. 4.6).
In screen printed wine labels, the use of colours is more limited than in paper, but for this project this was not understood as a disadvantage. On the contrary, the contrast produced by a solid colour or gold on the dark glass conveyed the laconic and distinct style that was sought for the brand image of Quinta de Tourais (Salazar, 2016).

Regarding the project’s broad communication, different ideas, collaborations and wine names were suggested, discussed and materialised within the group’s open and cohesive spirit. In the Miura wines’ range, for example, being the fruit of the friends’ gatherings in which everyone got together to buy a pig, make sausages, or contributed to buy a wine vat, they all agreed to designate this informal ‘society’ on the back-label (Fig 4.7).
Artist Luis Úrculo was appointed to design the visual identity of the *Furia* wine range, which includes a calligraphic logo and a series of illustrations. Different collaborators have contributed towards the *Miura* range. Thus when requesting a new illustration, only the technical constraints related with the silkscreened print are explained, leaving it entirely to the contributor the creation of the image which will be printed onto the bottle (Coelho, 2014; Vinhas, 2017).

Finally, Salazar claims that the value added by shifting to silkscreen print is recognised by both the project’s founders and the consumers, especially when compared with the first design approach of paper labels. The designer has met people who either keep the bottles as a relic or adapt them for different uses, like jars or candle holders. He thinks this is an unexpected sign of the worth of the new design, due both to the decorative effect of the illustrations and their material resistance, which become attractive for other purposes (Salazar, 2016).

In sum, the wines’ branding conveys a sophisticated image which has leveraged into symbolic and monetary value, a significant aspect also confirmed by Coelho (2014).

Looking back at how the project developed over the years, and even at how design was adapted when the wines branched into the distinct Tourónio, Miura, and Furia ranges, Salazar reinforces that there was never a very structured, calculated strategy. Adaptations and changes were made where needed, to suit the practicalities of bottling, applying seals and capsules, transporting, and dispatching the wines.

When discussing the relevance of the territory (or place of origin) in this wine project, the designer recalls that there were never strict constraints or directions passed onto the collaborators, although he recognises the importance of *terroir*. On this note, Salazar admits that a similar approach might have emerged (with identical visual characteristics) in another Portuguese region. Yet, he claims that what matters most is being truthful to the wine and its production circumstances. Designers, therefore, should have minimum interference, and simply ‘mediate’ the wine communication.

The multicultural confluence that occurs in Quinta de Tourais is authentic, as are the links established between people using different languages and from different origins: a winemaker, graphic designers, a textile designer (who is now a brewer), a telecommunications technician producing musical events (also the project’s curator), illustrators, conceptual artists, and musicians. All of that ‘miscellany’ is also characteristic of the Douro, Salazar asserts (2016).
Design and visual elements

Iconography

From the outset, the project’s aim was to conceive an original illustration for every single vintage (Fig 4.8). This was not always possible to achieve, therefore some illustrations have been re-used.

The Tourónio wine range was designed differently. A collage-creature inspired by the bull figure and made of different parts was created by Miguel Salazar. This motive was then unfolded into variations and displayed in the red and rosé wines as well as other applications, for example the estate’s signage, wine packaging, and t-shirts, as shown below (Fig 4.9).
Then, for the Tourónio white wine, a new interpretation of the bull was made by illustrator Júlio Dolbeth (Fig. 4.10). Both Coelho and Salazar (2014; 2016) acknowledge that despite all the different connotations that can be attributed to the bull today, the more ‘negative’ especially, this figure has become an iconic symbol within the branding system, generating great empathy and recognition amongst consumers – especially in the U.S.A. and in Scandinavia.

Fig. 4.10 Layout and illustrations of Tourónio DOC Douro, by Júlio Dolbeth

In that sense, shifting from purely typographical to illustrated wine labels was probably the most effective change within the design process, justifying the transition from a more stereotyped approach to the wines’ current iconography. The latter, which in some cases can be interpreted as deviant or enigmatic, may also help to trace symbolic aspects of place of origin, as will be explained further.

Fig. 4.11 Templates of the skull proposals for Miura. Miguel Salazar (left); unknown artist (right).
Two label designs with a skull motive (Fig. 4.11) were successively refused by the IVDP upon the label approval process, preventing Quinta de Tourais from using them for the market. Dissatisfied with the decision, Coelho lodged an appeal and was given a more detailed explanation by the regulators. The IVDP was intransigent, and supported the refusal on the regulations. Ultimately, the winemaker accepted the decision, but the designer’s viewpoint is less complacent.

Indeed, Salazar was disappointed that the projects were not implemented. The reasons given by the regulators, he observes, were inconsistent and clash with the market’s reality: for the designer, it is paradoxical that the IVDP refuses to authorise the image of a skull, claiming it might be connoted with poison, and thus compromising Douro wines’ ‘reputation’ (Appendix B), yet a rather expensive wine—Campolargo Calda Bordaleza—is currently out on the Portuguese market under the brand name of a well-known fungicide (Salazar, 2016). True, the latter is not from within the DDR, but the point is that it challenges the IVDP’s assumptions on the consumers’ perceptions.

The outcome of this episode was an alternative design made by Salazar for the 2005 and 2006 vintages: a pastiche work, celebrating the prestige of an Italian sports car (Fig 4.12).

![Fig. 4.12 Miura wine label, design by Miguel Salazar](image)

This proposal, as well as the Tourónio range labels, which the designer expected to be contested by the regulators for justifications similar to those of the ‘skull’ design, did not have any impediment in the process of label approval at the IVDP.

Likewise, the ‘monstrous’ character on the Miura label of 2008, which was made by former textile designer Américo Martins (one of the friends in the original group), has met with the approval of IVDP’s regulative board. Wearing a raw wool costume and a wooden mask, the ambiguous-seeming figure depicted on this label (Fig. 4.13) actually refers to an old Carnival tradition in a village close to where Martins’ family originates. The careto tradition is a pre-Roman, Celtic ritual celebrated in Lazarim, Podence, and other small locations in northern Portugal. On Shrove Tuesday (February) young men with wooden masks, dressed in suits made of colourful wool fringes, twine, sackcloth or leather parade and run frantically through the village. They scream and shout, revealing ‘embarrassing’ wrong-doings.
of some villagers out loud, frightening the people (especially single young girls) and ‘stealing’ wine. The feast ends with a shared meal. The ritual is associated with ancient agrarian fertility cults, and has unclear religious and profane boundaries. The masks and suits constitute a local craftsmanship, also on display at the village museum (Pereira, 2006).

![Fig. 4.13 Miura wine label, illustration by Américo Martins (left). Men wearing typical masks and costumes during the Carnival festivities in Lazarim (right).](image)

**Typography**

The typeface chosen for the identity and communication on the bottles is sans serif Gill Sans, by Eric Gill. A versatile choice, as Gill Sans is characterised both by its humanistic and geometric structure (Brinthurst, 1997: 242). Therefore, the typeface combines the features of a highly legible sans-serif – required for the legal information and for silk-screening constraints –, the elegance of classic lettering, and enough neutrality to let the image be a central element to the overall design.

According to Salazar, incorporating the technical information in the same visual field, as required by IVDP’s regulations (Appendix B), was not problematic. A symmetrical matrix was adopted and replicated on the bottles to maintain a coherent compositional structure (Salazar, 2016).

Furia displays a variation of the typographic design, composed in handwritten text by Luis Úrculo (Fig. 4.14), possibly denoting the rebel spirit of a brand that arose from a mishap.
Fig. 4.14 Display of calligraphic text on *Furia* wine labels, by Luis Úrculo

**Colour**

As explained above, when working with silkscreened prints, the use of colour might be limited, therefore for the label design of Quinta de Tourais this is one of the main constraints which has to be taken into consideration by the project’s collaborators.

Over the years, the choice of this printing process has demonstrated that using up to two colours is viable, affordable and efficient. As stated, the simplicity generated by the limited range of available tones was easily incorporated and thought to suit the overall project, possibly even causing a more positive visual impact. Below are two colour options for the same illustration, considered by Luis Úrculo (Fig. 4.15). The designer left the final choice to Paulo Vinhas, the project’s curator.

Fig. 4.15 *Furia* wine range, blue and red over white silkscreen print. Colour options by Luis Úrculo

**Materials and production**

Print production: Avena Décor (silkscreen printshop)

Description: Matt silk-screening on glass, one or two colours
4.2.2 The Fabelhaft series: translating the Douro

Contextual outline

Niepoort is a traditional port wine trader of Dutch origin, founded in 1842. It has developed as an independent company within the Niepoort family, for five generations, maintaining a close collaboration with five generations of master blenders of the Portuguese family Nogueira. Dirk Niepoort and his sister Verena have run the company since 2005, and in 2017 the former has taken the lead of the business.

Guided mainly by Dirk’s vision, the port trader has grown into non-fortified wines in the last two decades, and into producing wine in other Portuguese regions (Dão and Bairrada). However, its primary focus is still in the Douro, where wines are made either from owned vineyards or from grapes bought to local producers. Dirk Niepoort has been crucial in propelling the company from a conservative to an innovative path, claiming that his personality is a mix of both (Niepoort, 2014), and in making it highly visible in the wine world. While pursuing this goal, the avant-garde winemaker has been credited for raising world awareness on Douro wines (Johnson and Robinson, 2009: 174; Goode and Harrop, 2011: 30-31; Barreto, 2014: 226; Quaternaire, 2015: 13).

At the earliest phase of the research, oenologist Bento Amaral mentioned the influence of Dirk Niepoort within the craft, as well as of his former wife, PR Dorli Mühr, also regarded as a pioneer towards new ways of communicating DOC Douro wines (Amaral, 2014).

Dirk Niepoort became noticed for his innovative dry wines in the early 1990s. Gradually, after the first DOC Douro reds, further releases multiplied into an unusual variety of dry wines and made their way into the external market. In this quest to bring the Douro to foreign consumers, the captivating Fabelhaft wine labels have played an important role. A well-balanced, easy to drink, and affordable (but not cheap) DOC Douro, Fabelhaft was meant to work as an opener to other wines, i.e. Niepoort’s more sophisticated wines Batuta, Redoma, Vertente, Charme, Tiara, the eclectic Projectos (different partnerships), and the singular Turris, amongst others. The tactic proved rewarding. Thus, while maintaining the positioning of a ‘niche player’, Niepoort Wines is currently one of the most reputed Douro brands for both port and dry wines, in Portugal and internationally (Johnson and Robinson, 2009: 174; Ahmed, 2012; Silva, 2013: 44, 48).

Visitors enter Quinta de Nápoles in Armamar, where Niepoort’s dry wines are made, through an old manor house. Cleverly integrated into the surrounding Douro landscape, two contemporary buildings extend the estates’ facilities: a fairly spartan, semi-detached modern villa (Dirk Niepoort’s ‘apartment’), and a big, innovative winery, both designed by architect Andreas Burghardt (Fig. 4.16). Port wine vinification is conducted at a different facility, further up, in Vale de Mendiz (Cima Corgo).

Hosting many Portuguese and international visitors, workers and events along the year, Quinta de Nápoles is a lively site much beyond the agitated harvest period, where many of Dirk’s experiments are conducted (Fig. 4.17). This stimulating dynamic, which characterises Niepoort Wines today, was witnessed while pursuing field observations.
Most of the design-related work, such as wine labels, packaging, and visual identity, is managed, produced and handled closer to Niepoort’s head offices, in Vila Nova de Gaia (where the company also maintains the old cellars for ageing port).

The story of Fabelhaft can hardly be told without mentioning Dirk Niepoort’s charisma. A visionary winemaker and a humble admirer of the world’s great wines, it would be difficult to separate the attributes of his projects from his personality. Often described as ‘edgy’ and ‘irreverent’, Dirk Niepoort is a passionate and grounded winemaker who champions ‘authentic’ wines, i.e. wines that are an expression of the terroir (Goode and Harrop, 2011: 34-35; Barreto, 2014: 226).

Otherwise, Dirk calls himself a ‘cultural mess’. He was born in Portugal to a family of Dutch and German origins, studied in Switzerland, and worked in California and Australia before fully engaging with the family business in the Douro, which today extends to other Portuguese regions, and also Mosel in Germany (Niepoort, 2014; Silva, 2013: 43). The winemaker’s multilingual fluency is also mirrored on this particular project: he speaks at least six different languages, switching effortlessly from one to another, and often revealing his dry humour.

When not at the production locations, Dirk spends most of his time travelling, either taking Niepoort’s wines elsewhere or bringing wines of the world back home for tasting, for learning, and for sharing. Recently, he has initiated a tea production project with his wife, Nina Gruntkowski.
DESIGN PROJECT
Start date: 2004 (2002 vintage)
Project manager/producer: Dirk Niepoort/Niepoort wines
Design: Alessandri Design & Brand Studio
Creative Director: Cordula Alessandri
Collaborators: Willem Busch, author and illustrator, for Fabelhaft (DE); Daniel Torres, cartoonist, for Alonso Quijano (ES); Claude Cloutier, animator, for Diálogo Snow (CAN); Steven Appleby, illustrator and cartoonist, for Drink Me, 2004, 2005, 2007 (UK) [Appleby has created three different storyboards for different editions: Message in the Bottle, Secret Life and Hidden Essentials]; Dominique Goblet and Kai Pfeiffer, illustrators and cartoonists, for Allez Santé, 2012 (BEL) [In anticipation of the London Olympics a group label was also made by the artist duo and the collaborations of Olivier Deprez, Melinda Gebbie and Lars Henkel]; Maki Shimizu, illustrator and cartoonist, for Eto Carta, 2007 (JPN); Leif Otto Furset for Fabelaktig Troll (NO); Willem Hotkamp for Gestolen Fiets (NDL) Martin Kellerman for Rocky (SWE); Juba Tuomola, for Sarvet (FIN); Fintan Taite for Sásta (IRE); Bill Plympton, illustrator an animator, for Twisted (USA); Priit Parnaga, for ÖÖ Já Paev (EET), Carlinhos Muller, for Conversa (BRA).
Assignment outlines: Naming; visual identity; wine label design, ‘comics’ and ‘storyboards’ illustration
Core values: Telling captivating wine stories; highlighting DOC Douro; embracing cultural difference

Project overview
Contrary to a long past dedicated almost exclusively to the trade of port, the wine portfolio of Niepoort today is rather eclectic. The company’s current wine range is vast, reflecting the restless, experimental spirit of Dirk Niepoort. The winemaker has launched a wide selection of dry wines mostly from the Douro, but also from the regions of Dão, Bairrada, and Mosel. He also produces sparkling wine and has engaged in multiple partnerships and experimental projects with different winemakers from Portugal, and elsewhere.

Different designers collaborate with Niepoort Wines. At times, their different methods, as well as the broad diversity of products within the company may generate different approaches in wine label designs. However, the most recognisable graphic style of Niepoort’s wines consists of the following: a superposition of dot-contoured motives and semi-structured classical typography, black printed onto ivory paper (Fig 4.18). This well-known visual identity was first developed on the late 1990s, and owes much of its recognition to the Fabelhaft project, a series of wine labels art-directed by designer and educator Cordula Alessandri (Alessandri, 2016).

Fig. 4.18 Wine labels of Niepoort’s dry wines, design by Alessandri Design & Brand Studio.

When Dirk Niepoort insisted on designing a label for each target market of his entry-level DOC Douro wines, in the early 2000s, no one in the company agreed with him, considering that the strategy was crazy and risked to threaten the prestige of the Niepoort brand. However, even admitting the ‘logistical
nightmare’ of creating, approving, producing and distributing a different label for every importing country, the winemaker was determined to accomplish this idea (Niepoort, 2014).

The project started with an unusual design assignment which originated a wine branded specifically for the German market: Fabelhaft.

To make a wine from the Douro appealing for German consumers was not an easy task. At that time, there was little international awareness of the region’s dry wines. Niepoort understood that he needed to create an impulse on buyers to pick up a bottle. However, contrary to older practices within the craft, as well as recent trends in the wine world, adjusting the wine’s character was not an option; he wanted the consumers to taste his wine! Therefore, as the project evolved, it was not the wine, but the wine’s name and the illustrations on the label that were purposefully tweaked (Niepoort, 2014; Mühr, 2015; Alessandri, 2016).

The strategy of choosing a name as well as a specific illustration to suit each target market was not envisaged from the outset, though. The idea emerged and gained strength while Cordula Alessandri developed the design process. The designer had initiated a collaboration with Niepoort in the late 1990s, with the aim of ‘refreshing’ the company’s brand image. This work, developed at her studio in Vienna, ranged from DOC Douro and port wine label designs to the company’s corporate identity (Fig. 4.19).

By 2002, when the opportunity arose to make a particular wine label for the German market, Niepoort’s new label designs, displaying ‘perforated’ metaphorical illustrations, were already being implemented (Alessandri, 2016).

At the time, Alessandri was a visiting lecturer at HBK Saarbrücken in Germany and used to conduct weekly projects of practice-based work. Having agreed with the School, with Niepoort and with the students (who were promised a carton of wine), she challenged her class with a ‘real world’ assignment. The core point of this task was to explore the different visual communication strategies according to the market country. In this case, the Portuguese and the German markets.

Fig. 4.19 Examples of Niepoort's visual identity design across different wines. Design by Alessandri Design & Brand Studio
Dirk Niepoort was confident about the distinctive character of his wines. His intention was to highlight their provenance, therefore he required that the words ‘DOURO’ and ‘PORTUGAL’ ought to appear visibly on the front label (Niepoort, 2014).

The Fabelhaft series was meant as an ‘opener’ for other wines, and proved effective in this task: there is general agreement that not only other Niepoort brands but also many other Douro brands have benefited from Niepoort’s audacious project (Ahmed, 2012; Silva, 2013: 48, 82-83; Amaral, 2014; Niepoort, 2014; Barreto, 2014: 226; Mühr, 2015).

The approach was an immediate success within the German market, and the initial expectations were largely exceeded. Subsequently, Niepoort began to develop labels for other countries (Fig. 4.20). The main product is a DOC Douro red, but a white Douro was launched in 2011, and in 2013 a rosé was also added to the collection. In some countries, a ‘Reserva’ (reserve) version is available.

Currently, Niepoort markets 26 different Fabelhaft wine label designs, but Dirk estimates that the total release outnumbers this figure. For the winemaker, the most distinctive aspect of this branding strategy is language: verbal and visual language (Ahmed, 2012; Niepoort, 2014; Alessandri, 2016).

The design process

The unlabelled wine that triggered the initial assignment was named as O Mouro (which means ‘The Moor’). Encouraging her students at HBK Saar to explore visual interpretations of the concept, Alessandri handed them the brief and asked them to design a new wine label. However, the aim of the assignment was also to question whether distinct design approaches ought to be proposed for different target markets. In this case, the Portuguese and the German markets.

The students created different and original propositions, but Anne Klenk’s design stood out for ‘borrowing’ the illustrations of Wilhelm Busch (1832-1908), the German author and creator of the famous work Max and Moritz (Fig. 4.21). In particular, Klenk was inspired by a poem from a book.
named *Hans Huckebein, der Unglücksrabe* (first published in 1867), which tells the story of an unfortunate raven who drinks so much wine, he mistakenly hangs himself (Fig. 4.22). Although the school brief did not require that the students integrate Niepoort’s visual identity within the design, Klenk was the only student who used the characteristic dots or perforations. She composed these elements as a grid, which made the illustrations look like a comic strip (Alessandri, 2016).

![Fig. 4.21 Some of HBK Saar students’ design propositions for the wine label *O Mouro.*](image1)

![Fig. 4.22 Layout for the wine label *O Mouro.* Design by Anne Klenk.](image2)
When Niepoort saw the students’ works, he was immediately struck by Anne Klenk’s proposition. Both the designer and the winemaker agreed it did not suit the brand O Mouro, which happened to be a wine from Alentejo (in southern Portugal), made by a friend of Dirk’s. However, they also recognised the design had great potential, namely to captivate German-speaking consumers due to their familiarity with the works of Wilhelm Busch. Dirk had always thought of launching a Douro wine in Germany, and was convinced the unusual design approach might be a good way of doing it. Besides, the link with the Niepoort brand had also been cleverly incorporated in the design by Klenk.

According to both Alessandri and Niepoort, as they were discussing the proposition at the designer’s studio, an enlightening dialogue developed, almost as an epiphanic episode, in which the term Fabelhaft emerged. It means ‘fabulous’ in English, but also works as a play of words with fabel, which is the German word for ‘fable’ (Niepoort 2014; Alessandri, 2016) (Appendix F). Thus Fabelhaft became the brand name for the Douro wine which was to be launched in Germany.

As the Fabelhaft wine label was being perfectioned at Alessandri’s studio (Fig. 4.23), it paved the way for the bolder idea of creating different stories for different countries/target markets. Although its launch was a great success in Germany from the outset, two years passed before Niepoort was ready to expand the brand into other countries. But from there on, the project has taken off.

Aiming to establish a quality criterion for the broad design project, Alessandri defined a strategy whose concept was written by Gert Winkler, a notable Austrian creative director (Appendix F). This concept implied inviting famous illustrators and cartoonists worldwide. They would be asked to incorporate the language and the culture of the market country by creating an amusing story about the wine. A fundamental constraint was that the story had to be told in twelve pictures, to be read vertically. The main point of this strategy was to bring the Douro to the awareness of foreign consumers through a captivating name, an entertaining narrative, and the highest quality illustrations.

Drawing from this concept, five ‘comics’ labels were further conceived and art directed by Alessandri for different markets (Fig. 4.24): Gestolen Fiets 2004, illustrated by Willem Hotkamp (The Netherlands); Sarvet 2004, illustrated by Juba Tuomola (Finland); Bola Dentro 2006, illustrated by Carlinhos Muller (Brazil); Diálogo 2005, illustrated by João Afonso (Portugal); and Merton 2005, illustrated by Bill Plympton (USA). Fantasi, with original illustrations of the late Danish author Hans Christian Andersen, was launched soon after in Denmark (Fig. 4.25).

It is essential to observe the refinements made at Alessandri’s studio after the initial idea was adopted because they reveal the designer’s technical expertise within the field, which is essential for making a wine label effective. The knowledge of a wine bottle’s display and manipulation, for example, which determined to change Klenk’s horizontal arrangement into a vertical sequence. Also, the layout of the mandatory information according to the requirements of the IVDP, that was skilfully fitted into the 13th frame (Fig. 4.29). A visual template was thus created to facilitate the creative work of the invited collaborators (Fig. 4.23).
Fig. 4.23 Final design and template for the Fabelhaft wine label. Design by Alessandri Design & Brand Studio/Anne Klenk.
Fig. 4.24 The first series of Fabelhaft wine labels. Design by Alessandri Design & Brand Studio/different collaborators

Fig. 4.25 The design for Fantasi, with original illustrations of Danish author Hans Christian Andersen.

Despite the complexity of managing a project with so many variants and collaborators, as mentioned, one of the remarkable aspects of the Fabelhaft project is its potential for expansion. A different series has been released under the designation of the ‘storyboard’ labels, clearly moving on from the comics’
universe to the world of moving images (Niepoort, 2014). Central to this development is the work of animator Regina Pessoa. Pessoa’s illustrations for Drink Me, the UK version of Fabelhaft (Fig. 4.26), are in fact stills of Kali, the little vampire, a 9-minute short animated film released in 2012. The film bears connections with Niepoort wines, and during its long making of Pessoa has produced other illustrated work for Niepoort, namely the comic story Rubi Dum and Tawny Dee in NiePortland, which has inspired the creation of the twin characters for tawny and ruby ports (Fig. 4.27). Subsequently, other wine labels of the ‘storyboard’ series have been made by different animators, such as Phill Mulloy, Bill Plympton, Paul Driessen and Claude Cloutier, amongst others. This series was clearly influenced by Pessoa as well as her husband, animator and director Abi Feijó, who have been longtime friends with the winemaker (Niepoort, 2014).

![Fig. 4.26 The illustrations for Drink Me, made by Regina Pessoa](image)

![Fig. 4.27 Ruby Dum and Tawny Dee, the characters of Niepoort's ports. Illustration by Regina Pessoa](image)
Design and visual elements

Iconography

Niepoort’s graphic style was conceived at Alessandri design studio in the late 1990s. The dotted shapes were intended initially as perforations or cut-outs that ought to reveal and to take on the colour of the bottle or the wine underneath (Niepoort, 2014; Alessandri, 2016). This idea was abandoned due to the technical difficulty of executing the die cutting at the print shop. Instead, the dots were printed in black ink and highlighted with a UV varnish relief. The perforations were not wholly abandoned, but instead used for other materials, such as the company’s stationery (Fig. 4.2).

Fig. 4.28 The dots and perforations applied onto different artefacts. Design by Alessandri Design & Brand Studio.

Due to the need of including the various wine ranges, the complex work assigned to Alessandri also implied the articulation of different visual elements that inform the Niepoort identity and that are used throughout, i.e. the cameo logo representing the company’s founder, Franciscus Marius van der Niepoort (b. 1813), and the company’s calligraphic logo (Fig 4.29).

Fig. 4.29 Niepoort’s ‘cameo’ logo and the calligraphic signature

As most calligraphic brand signatures, Niepoort’s script has been used throughout the company’s long-lasting history and therefore conveys guarantee, pride and quality (Mollerup, 1997: 159). The signature logo is inextricably bound to the company’s port wines and to their well-known dark-green containers, the demijohns, where it was first applied onto white ink. The demijohns were given the purpose of ‘ageing vessels’ in the early 1930s for the maturation of a specific type of port named ‘garrafeira’. Niepoort is credited for being the only port wine house using this method (Niepoort, 2014). Therefore, the signature logo is more visible on port wine labels than on the dry wines’ (Fig. 4.30). In the latter case, Niepoort opts for relegating the logo to a less visible area of the wine label, in a smaller scale, or
embedded into informational text boxes. For the Fabelhaft wine labels, the logo was not part of the composition until 2006.

Fig. 4.30 Niepoort’s demijohns; port wine labels. Design by Alessandri Design & Brand Studio.

Typography

The final typographical work for the Fabelhaft wine labels was also refined at Alessandri’s studio. The aim was to convey a design that would provide some coherence regarding the style of other Niepoort wines. The main typography chosen for Niepoort’s Douro labels is set in Mrs Eaves, by Zuzanna Licko. Styled after John Baskerville’s famous transitional serif typeface, which was designed in the late 18th century, this choice may be interpreted as a subtle reference to the wine company’s history and tradition. For the wine label layout, Mrs Eaves is paired with Eurostile (designed by Aldo Novarese in the 1960s). The sans-serif typeface is used for secondary and mandatory information. Eurostile’s geometrical features contrast the more traditional ones of Licko’s typography. The typeface’s squared design allows for all the informational text to be compactly set so that it displays according to the regulations. It was also sought as a more neutral element, so that the main attention can be drawn to the illustrated story, the core element of the whole composition (Fig. 4.31).

Fig. 4.31 The display of technical information.

Colour

The limited use of colour on the Fabelhaft project is characteristic of the project’s visual principles. This choice was first influenced by the use of Wilhelm Busch’s’ original illustrations as the initial ‘iconic’
design. Furthermore, due to the traditional use of black and white in comics, it was considered that most illustrators/collaborators would easily adapt their stories to this particular constraint (Alessandri, 2016). Limiting the number of colours would also reduce the costs of production for the majority of the designs, and allowed to create special editions. Therefore, for most of the DOC Douro red editions, Alessandri has employed only one colour (black), and sometimes two. Subsequently, Niepoort has released a few editions where three colours are applied onto ivory tinted paper (Fig. 4.32). Foil stamping details (gold for red wine and silver for white wine) were chosen for the Japanese edition (Fig. 4.33).

The use of colour throughout is therefore minimalistic. When the white and the rosé wines were introduced, a background tint was defined to distinguish the different styles on the shelves. Thus white wines are coloured with a pale shade of azure, while rosé wines display a pink background (Fig. 4.34).

![Fig. 4.32 Allez Santé (BEL) is printed with three colours. Illustrations by Dominique Goblet and Kai Pfeffer.](image1)

![Fig. 4.33 Eto Carta, the Japanese edition with foil stamping details. Illustrations by Maki Shimizu.](image2)
Materials and production

WINE LABELS

Pint production: VOX, Vila Nova de Gaia

Description: Offset black/colour print; Braille varnish (over black printed dots); foil stamping

Paper: Manter Tintoretto, ivory shade
4.2.3 Churchill’s wines: designing timelessness

Contextual outline

Churchill Graham, also known as Churchill’s, is a relatively new British-owned company in the Douro. It was founded by John Graham, whose family has a background in the port trade (they owned the well-known Graham port wine brand, which currently belongs to the Symingtons). When John Graham established the company in 1981, he used his wife’s surname (Churchill) to compose the main designation of the new wine house (Barreto, 2014: 252).

The company’s winemaking philosophy is to produce and to sell high quality, niche wines. Established first as a port wine producer, with a reputation built on selling low quantities of premium port in the UK, in 1999 Graham went on to acquire Quinta da Gricha and venture into the production of premium DOC Douro wines. The estate is located in the region of Cima-Corgo, on the southern bank of the Douro (Fig. 4.35). The specific qualities of the different plants that make the plots of the estate’s vineyards, including old vines, are the backbone of Churchill’s’ wines. All the ports and dry wines are made with Grade A grapes and produced exclusively with local varieties. Old granite lagares from 1852 are still used for production (Mayson, 2013: 209; Campos, 2017).

Fig. 4.35 A view from Quinta da Gricha

In the 1970s, John Graham was working at Cockburn Smithes, where he met the grower family Borges de Sousa. Owing to their trustful relationship, when Graham established Churchill Graham Lda in 1981, Borges de Sousa provided the grapes for his first port wines, and continued to do so for 20 years. Then, a new generation within the growers’ family started making their own wines at Quinta do Fojo, and John Graham understood he needed properties to source his own grapes. He was looking for a fresh, south bank territory with more acidic soils and found those qualities at Quinta da Gricha, an estate of 100 hectares, between the Douro tributaries Pinhão and Tua (Appendix A). Another property was also acquired further south, which is used to source grapes for a fruitier port. This particular location, as well as the use of different grapes from Quinta da Gricha has determined the dry wines’ most distinguishing characteristic: freshness. John Graham is also an enthusiast of the variety Touriga Nacional, which is...
used (unblended) for one of his table wines. Churchill’s wines are still foot trodden in granite lagares, following the traditional practice in the Douro (Mayson, 2013: 209).

Maria Emília Campos, Churchill’s current commercial director and joint CEO, has had a pivotal role in the renovation of the wines’ image. She started working at Churchill’s in the mid-1980s, but by 2000 she decided to leave and to pursue her own projects in the wine distribution sector. A learning period, Campos assumes, that provided new insights and confidence on the potential of Douro’s niche wines. During this time, she kept selling Churchill’s wines, steadily adding dry wines to their original port-based portfolio. When she took on a new role in the company, a few years later, Churchill’s had grown significantly, and according to Campos needed to adopt an appropriate, more open, and independent communication strategy. This strategy encompassed the redesign of the company’s wine labels and the establishment of a visitor’s centre in Vila Nova de Gaia.

Campos acknowledges the conservativeness of the DDR environment, especially amongst older companies focused mostly on port. On this note, she admits that had not Churchill’s been a ‘young’ player within the DDR, her restless and daring initiatives might not have been well received. That is what got her to assign the task of redesigning the wines’ image to Interbrand (Campos, 2017).

### DESIGN PROJECT

<table>
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<th>Start date: 2008 (2006 vintage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project manager/producer: Maria Emília Campos/Churchill’s wines</td>
</tr>
<tr>
<td>Design: Interbrand</td>
</tr>
<tr>
<td>Creative Director: Daniela Nunzi-Mihranian</td>
</tr>
<tr>
<td>Assignment outlines: Rebranding and visual identity; design of wine labels and packaging across DOC Douro and port ranges</td>
</tr>
<tr>
<td>Core values: Purity, passion, patience</td>
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### Project overview

Churchill’s dry wines were already being traded before the company decided to appoint a design consultancy with the aim of rethinking their brand image, and to address new external markets. The former visual communication, conceived by designer Miguel Freitas, consisted of a sober and classic style, in line with the ‘laconic’ port wine clichés mentioned earlier in chapter 2 (Providência, 2010: 13). The company’s wine label designs across port and the dry wines’ range displayed elegant typographical compositions on black and golden print against a bright white background (Fig. 4.36).

![Former wine labels of Churchill’s dry wines, design by Miguel Freitas.](image)
In 2007, as the company was taking on a new direction and intended to expand their DOC Douro Churchill’s Estates range while targeting specifically the UK market, an adjustment to the visual communication was considered advantageous, and the brief was assigned to Interbrand.

Presently, both Emília Campos and creative director Daniela Nunzi-Mihranian refer to this project as a fortunate encounter: for Churchill’s, Interbrand offered both the solid competence in design as well as the convenient consultancy expertise which was familiar with the British wine market; the London-based agency, for its part, was seeking a wine-based project to expand their portfolio of premium brands (Mihranian, 2016; Campos, 2017). At the time, Nunzi-Mihranian, who has won a Design Effectiveness award, a Mobius award and a New York Festival award, had been appointed to the position of creative director at Interbrand to work specifically in the drinks, beauty and luxury sectors. Currently, she runs her own design studio in London.

The project implied the refreshment of an existing brand image mostly associated with port. Although the initial assignment was meant to address only the company’s DOC Douro wine range, it was rapidly widened to incorporate port wines, as well as a refinement of Churchill’s visual identity (Fig. 4.37). According to Nunzi-Mihranian, this has put a new demand into her original approach, because it was necessary to keep the coherence of the broader project whilst working across the different wine styles. Despite of this challenge, the designer has stated that the project was the ‘perfect brief’, because there were no preconceived ideas and she was allowed to conduct the task with very few limitations. Nunzi-Mihranian clearly understood that the aims were and how to achieve them, and the fact that there was a previous image didn’t have much influence on how the design approach was conducted. Additionally, she credits the trustful relationship established with Maria Emília Campos as an important factor towards the success of the resulting outcome. The designer was compelled to visit the Douro, and she admits that the close contact she experienced with the wines’ place of origin has impacted her design approach significantly (Nunzi-Mihranian, 2016).

When the design team arrived in the Douro, they were immediately caught by the characteristic landscape of the valley. Nunzi-Mihranian points out that the display of the vine terraces along the slopes was so impressive, she felt it would be impossible to overlook this particular feature of the territory in
the project. The design team therefore conceived that the new image, labels and packaging ought to reflect the physical environment where the wines were made, to capture its beauty, and to transmit some sense of scale. These core ideas have determined both the use of aerial perspectives of the actual production locations, as well as the large size of the paper labels wrapping the bottles, setting a difference from the conventional size of wine labels within the wine trade in general, and the former designs of Churchill’s in particular (Fig. 4.38).

![Fig 4.38 The new packaging, Design by Interbrand](image)

After learning on the maturing and ageing processes which were necessary to improve the character of both DOC Douro and port wines, Interbrand also coined the company’s slogan ‘Worth waiting for’. Building on from the importance of time within this context, Nunzi-Mihranian recalls that the only expectation transmitted by Churchill’s was the idea of a ‘timeless’ image. For the designer the fact that one decade after the rebranding is still working well for the company, probably demonstrates that timelessness was achieved (Nunzi-Mihranian, 2016; Campos, 2017).

**The design process**

The design process was essentially divided into three phases: the rebranding, which consisted of a refinement of the existing visual identity (Fig 4.39); the construction of a new imagery for the DOC Douro wines; and the combination and replication of the resulting designs into the different labels and packaging (Fig. 4.40).

Having to work with fortified and dry wines at the same time influenced the designer’s aesthetic approach of ‘purity and simplicity’, i.e. the explicit use of blank space, the typographical refinements, and the choice of black and white for both text and imagery. Such an approach also reflects a particular concern with the craft’s traditions, as mentioned in chapter 2.2, and considering the company’s history in the context of port production (Nunzi-Mihranian, 2016).
The labels’ tactile appeal is conveyed by the specific process used to edit the photographs, almost suggesting an etching. The images were printed onto uncoated bright white paper and combined with black gloss finishing. The ‘textured’ landscape is replicated similarly on the aluminium capsules and the cardboard packaging. The images can also be seen in big prints at the company’s Visitor Centre in Vila Nova de Gaia. The visual effect of this particular way of using aerial photography is both iconic and a statement on the importance of the Douro landscape. However, it attempts to detach from more traditional depictions of the Douro terraces, aiming at a more sophisticated and modern image.

The designs were adapted into the different wine labels and packaging with the intention of capturing a family-looking feel that might develop coherently across the different wine styles.

For Nunzi-Mihranian, the technical aspects of the back label’s design are significant as well, because they need to respond to both the needs of the producer and those of the regulators (4.41). However, to display a great number of information in a much more limited surface is often challenging. It is a work that should not compromise the beauty of the front design. It needs to be perceived as done ‘by the same hand’, therefore most of the detail goes into the typography, the line breaks of the types, and the balance of the mandatory elements (Nunzi-Mihranian, 2016).
Design and visual elements

Iconography

According to Nunzi-Mihranian, the photographs were purposefully turned into illustrations: this has resulted in an original and dramatic visual outcome, drawn from the black and white imagery, that sets an immediate bond with the place of origin (Fig. 4.42). The aerial photographs were also a means to achieve a textured, decorative effect on the bottle that is explored differently on the reserve wine with UV varnish over a matte black surface (Fig. 4.40). The designer explained that the pictures were traced over to make them more iconic and more ‘ownable’ to Churchill’s (Nunzi-Mihranian, 2016).

The crown logo was one of the brand’s visual elements that was supposed to be retained, due to the British ascendancy of Churchill’s owners and the company’s link with the British market. Therefore it
was brought back more consistently into the new branding system, and it is currently more tightly linked to the brand name, as figure 4.39 demonstrates. For the wine labels, the crown is printed in foil stamped gold. The resulting metallic sheen, as well as the slight embossing result produce an impressive effect that speaks to the premium quality of the product.

**Typography**

Different procedures enabled to improve the brand’s typographical expression: first, the letters on the logo were kerned into the current composition, which now presents a more solid and compact version of the brand name. Then, a typeface combination/hierarchy was defined, dictated mostly by the central positioning of the brand name. The typographical hierarchy develops into the use of sans serif Aviano Sans, which is also used for technical information, the more classic typeface Shango Regular, and the script style Gracia. Evident contrast was also established between the blank space and the typographical elements, which results in a more balanced and sophisticated composition (Fig. 4.42).

![Image](image_url)

**Fig. 4.42 Different typographical combinations and hierarchies with serif, sans serif and calligraphic typefaces**

Copperplate Gothic, the main typography, was originally designed by Frederic William Goudy in the early 1900s. The typeface displays uppercase letters only, and owns its name to the small serifs that are reminiscent of letters engraved in copperplate. Due to its robust and squarish design, until the mid 20th
128th-century Copperplate Gothic was very popular amongst certain professional environments, such as law firms, financial businesses, and the mainstream press (Heitlinger, 2006). This typographical choice is therefore in line with the laconic style of port wines, already mentioned in chapter 2.6.

Further packaging designs and details usually make simple replications of the logo (Fig. 4.43).

Fig 4.43 Different applications of visual identity: bags, wrapping paper and capsule

**Materials and production**

**WINE LABELS**

Production: VOX, Vila Nova de Gaia

Description: Offset black/colour print, Braille varnish (over black printed dots), and foil stamping

Paper: Tintoretto Crystal Salt (Manter)
4.2.4 Quinta dos Murças: expressing the terroir

Contextual outline

The first historical reference of Quinta dos Murças dates back to 1770. The site lays strategically by the Covelinhas railway station, near Pinhão (Fig. 4.44) (Appendix A). For years, this has facilitated the transportation and trade of goods: beyond wine and olive oil, fruit and honey of exceptional quality were also produced locally (Barreto, 2014: 252). The property comprises different infrastructures, such as the main house from the 19th century, and ruins of old buildings which date back to 1826, consisting of houses, warehouses, granite presses, a chapel and a sheltered creek.

Manuel Pinto de Azevedo, a notable businessman and philanthropist from Porto, purchased Quinta dos Murças in the late 1930s in a state of complete abandonment, but he was determined to transform it into an exemplary case. Thus, until the mid-1950s, the settlement staged a remarkable development, which included a pioneer vertical vine planting, inspired by the use of this type of vine training in the French Pyrenees and in Switzerland. Conducted by agronomist José de Freitas Sampaio, the first auto-vinification system ever used in the region was employed, a method pursued mainly for port production (Pereira, 2013: 101; 2014). The estate was acquired in 2008 by Esporão, a well-known wine producer from Alentejo (southern Portugal).

Fig. 4.44 Murças Lda., unknown date (left), and Quinta dos Murças today (right), owned by Esporão.

Looking from the opposite side of the river, Quinta dos Murças looks like any other sloped landscape of the Douro. Without visiting the estate and talking to José Luis Moreira da Silva, who supervises the local winemaking, it might be difficult to guess the extension and the richness of the terrain.

The property’s vines are distributed in different plots, occupying land up to 300m altitude, as well as lower areas closer to the riverfront. Whilst improving the vineyards, Esporão preserved both the vertical planting and the traditional terraces. Dozens of indigenous grape varieties were also planted to meet the standards of organic production. Additionally, olive trees, an orchard with orange, tangerine, lemon and other fruit trees, as well as a classified forest are being nurtured.

Experts in soil analysis were consulted, and concluded that the property had at least eight different terroirs, both due to altitude variations and to different sun exposures. Exploring this diversity under the guidance of chief winemaker David Baverstock, Esporão released their first range of DOC Douro wines in 2011. In accordance with the mission statement of Esporão, Quinta dos Murças aimed to produce fine wines ‘in a responsible and inspiring way’ (Andrade and Rio, 2014: 3).
**DESIGN PROJECT**

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<td>Design:</td>
<td>White Studio / Studio Eduardo Aires</td>
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<td>Eduardo Aires</td>
</tr>
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<td>Core values:</td>
<td>Terroir, diversity, history, heritage</td>
</tr>
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**Project overview**

The current visual identity and communication of the wines of Quinta dos Murças was built under the creative direction of designer Eduardo Aires. For ten years, the latter has developed a dynamic and fruitful professional collaboration with Esporão (Aires, 2016).

João Roquette, CEO of Esporão, acknowledges design as a means of conceiving, shaping and yielding identity to crucial strategic transformations within his company. He describes the work assigned to Eduardo Aires as a dynamic partnership, where the accomplished ideas have added value to the projects, ameliorated the products (wine in particular), and provided better experiences for consumers.

Roquette values the lively discussions held with the designer, which turned into fresh, clear, structured ideas, as well as specific approaches to each assignment. The resulting designs, he observes, were assertively materialised and produced by the design studio. Within this process, which has been developing for nearly a decade, Roquette has learned about the scope of design beyond a purely aesthetic concern, which implies content, structure, and vision. In the case of Esporão, Roquette asserts, the engagement of design has meant growing better, not just growing bigger. Likewise, Aires highlights the benefits of a reliable, open relationship between the designer and the stakeholders which, he reckons, is a fundamental condition to deliver an achieved and effective outcome (Aires, 2011: 94; 2018).
The starting point of this project was the methodology defined by Aires to collect the fundamental knowledge about Quinta dos Murças. For the designer, it was clear that the place had an important story to tell, therefore he set up a preliminary stage based on the works of a historian, a geologist and a team of documentalists. The aim of this joint research was to produce a body of relevant historical and geomorphological data that might inform the creative proposal.

As a result, the essay produced by Gaspar Martins Pereira, the scholar whom has specialised in the Douro, became the pillar of the design work (Aires, 2011: 96-97). The complete body of research has complemented other important aspects of the design project. In particular, this preliminary inquiry has clarified the significance of pioneering viticultural practices within the estate, and provided visual cues linked to both its architectural and viticultural heritage. The characteristics of the local terroir have informed subsequent developments of the design project, namely the differentiation of the distinct wine ranges produced locally.

Complementary, photographers Duarte Belo, José Manuel Rodrigues and Pedro Magalhães were assigned to produce portraits of the site at different times of the year (Fig. 4.45).

The design process

Before 2008, port and dry wines of Quinta dos Murças were marketed alike through wine labels which reflected both a historicist and a nostalgic approach. The logo used by the former owners denoted a vernacular taste, drawn from heraldry conventions: a coat of arms composed of a shield, a wild boar, and other charges, alluding to the family of the first proprietors (Aires, 2011: 98-101; 2018).

The new design project by Aires started with the definition of an updated visual identity. What would become the central element within the project, the mark was made up of oblique lines evoking the estates’ pioneer vineyards, i.e. the vertical vines (Fig. 4.46).

From there on, the project has developed as a successive transposition of visual elements into different forms: texture, colour, foil stamping, scale, three-dimensional. The design development is consistent with the central concept of the project, which emerged from the visual interpretation of a territorial feature. However, the designer has continuously added different levels of meaningful information: through imagery, in photographic and illustrative form; through colour; through typography; and through other material features of the wine labels, such as the paper’s thickness, scale, and its texture.
Anticipating the wide scope of possible applications, Aires proposed a complete design program for the project’s new image. The latter was the result of a thorough methodology, which included:

1) A detailed review of the property’s history and geomorphology;
2) Redesigning the estate’s visual identity in accordance with the new owners, without neglecting the location’s history and existent references within the territory;
3) A photographic ‘portrait’ of the estate comprising its different facets and terroirs, conducted by the photographers Duarte Belo, José Manuel Rodrigues and Pedro Magalhães.
4) An illustrated ‘portrait’ of the different terroirs within the property, made by António Modesto;
5) A three-dimensional schist piece alluding to the new visual identity, made by sculptor Vicente Gajardo;
6) A visual scheme for the complete wine range produced at Quinta dos Murças.

Following the aforementioned methodology, Pereira’s historical account has been the major influence in the construction of a visual identity entirely drawn from the concept of the pioneer vertical vines.

Fig. 4.46 The geometric construction of the logo and different applications. Design by E. Aires.

The new visual identity, as well as the full range of wine labels created by Aires, denote a structural visual laconism that enables to add layers of information, technical as well as symbolic, and opens up into different ways of identifying the wine ranges. This, in turn, allowed to explore the richness and the diversity found in Quinta dos Murças, without losing aesthetical and formal coherence.

The main design of the DOC Douro wine labels is therefore based on a recognisable symmetrical visual scheme, established by the logo and the wine’s name, that branches out into the different dry wines produced at the estate (Fig. 4.47).
On a first stage of the wine label development, a clear design distinction was established between the labels for the entry-level wines, displaying photographic depictions of the plots, and the minimalistic ‘white blanket’ label for the reserve wine (Fig 4.47). The latter is an elaborated construction, despite its pristine appearance. Aires states that the high quality of the Reserva wine required a more solemn approach, and one that could bear connections with a ‘traditional Douro’ wine label. That is what motivated the choice of a large surface of premium paper. The pattern of oblique lines was applied as a
background motive in blind embossing. The logo, as well as the designations RESERVA and DOURO have been foil stamped in gold.

According to the designer, the first wine label proposal for this wine was even more minimalistic. However, Roquette’s father, the Esporão patriarch, felt that some ‘classicism’ was missing. Aires suggests that this remark might have been influenced by the persistent visual clichés of Douro’s wines. Nevertheless, he has addressed Roquette’s observation, and admitted that his first proposal was probably ‘too spartan’ (Aires, 2016). Therefore, two elements were added onto the adjacent back label: the long ‘narrative’ set on classic Garamond typography, and a black and white drawing made by António Modesto, suggesting the idea of an old engraving (Fig 4. 48) (Aires, 2011: 104-105).

![Fig. 4.48. The final template of Quinta dos Murças Reserva, incorporating the back label. Design by E. Aires](image)

Except for Quinta dos Murças Reserva and Ânfora, which are named after designations from within the wine craft that speak to the processes of maturing, all the other wines’ names refer to particularities of the different terroirs or vineyards within the estate. Thus the wines of the intermediate range are called Minas (Springs), a name which evokes the water sources existing in specific spots; Margem (Margin), made from vines located at a lower position, near the river; and VV47 (Vinhais Velhas, or old vines), a limited edition made from vines over 47 years old.

An impressive visual effect was sought with the choice of colours for the intermediate range and that has been purposefully contrasted with a more neutral typography. The names, vintage years and place
of origin (Douro) are hot-foil stamped in metallic tones to convey classicism, richness and texture. The capsules have been colour-tailored to reinforce both the coherence and the visual impact of the whole design (Figs. 4.49-50) (Aires, 2016).

Similarly to Reserva, a superposition of blind embossing adds to the resulting outcome (Aires, 2017).
Design and visual elements

Iconography

The most important visual element of this project, from which nearly all the others branched out, is the trademark. The origins of this particular design were made explicit above. The mark has the shape of an escutcheon filled with a pattern of overlapping diagonal lines. The designer kept the vernacular link as a reference to the history of the property and to the estate’s architectural heritage. Instead of using ‘invented’ heraldry features, Aires produced a graphic interpretation of the viticultural practices which are characteristic within Quinta dos Murças – the oblique and vertical vine settings.

The trademark was expanded into different applications and materials, both symbolic and decorative (Fig. 4.51). A three-dimensional exploration was also sought: it is expressed in the blind embossing of the Reserva wine labels, as well as in a schist piece made by Vicente Gajardo, for which the sculptor symbolically used the stone that makes up most of the local Douro soil (Aires, 2011: 102-103).
An additional visual element which will be incorporated onto the design of the intermediate range in the near future, is a series of illustrations produced by António Modesto depicting the different vineyards (Fig. 4.52). The illustrations are meant to emphasise the particularities of each plot.

Fig. 4.52. Margem, Minas and VV47. Illustrations by António Modesto.

The terroir is therefore clearly central to the broad project’s philosophy, a translation of viticulture into the design. The designer defines this approach as a strong and consistent visual anchoring which enables to transmit unique narratives and an authentic sense of belonging (Aires, 2016).

Typography
The lettering of Quinta dos Murças logo is typeset in Aviano Sans, a modernistic sans serif edited by Insigne Design. Since the main typography of Esporão (brand name) is displayed in Garamond, the complementary textual information on the wine labels was also composed with this typeface. Specific
mandatory information on the back label is typeset in Univers, which is a more neutral typographical choice. Despite their different categorisation, Aviano Sans and Garamond bear similarities regarding the letters’ structure, i.e. a wide and compact design. Therefore, the two typefaces enable a consistent and flexible combination of both modernity and classicism, which is in line with the viticultural approach at Quinta dos Murças.

The overall layout across the wine label designs also establishes a connection with the Douro and port wine tradition: symmetrical compositions, as well as simple and sober typographical combinations.

Colour
As stated above, colour is a significant aspect within Quinta dos Murças’ design project. Therefore, once a matrix was established for the entry-level and for the top ranges, colour worked not only as a distinguishing element for the individual wines, but also as an important and original brand identity component. Thus the designer’s colour choice contrasts especially with the visual stereotype of Douro wines, i.e. the use of black and white.

Similarly to the intensity displayed in the photographic labels, the colour density of the intermediate wine range, according to Aires, was intentionally ‘disruptive’. It was necessary to identify the distinct wines, and, as explained above, a sense of classicism had already been addressed in the Reserva wine label. The designer felt an opportunity emerged as to explore modernity and originality without compromising on the conceptual and visual coherence of the project. Therefore, the successful outcome of the first wine label designs created the ideal background for a sequel of colour innovation (Aires, 2017).

![Graphic template for the cork design](image)

Fig. 4.53. A graphic template for the cork design. Design by E. Aires

Materials and production
Print production: Etiquel and VOX
Paper: Avery Fasson White Cotton (Quinta dos Murças); Avery Fasson Rustique (Assobio)
Port wines (Vintage and Tawny): AvenaDecor, silkscreen printing
Packaging: AEME, Embalcut, Calheiros, Cartonagem Trindade
Corks/cork printing: Amorim
Capsules: Cápsulas do Norte
4.2.5 Crochet: crafting a women’s wine

Contextual outline

Winemaking is considered by many to be a masculine profession and the Douro is no exception. In the region’s historical accounts a single woman stands out – Antónia Adelaide Ferreira – as one of the most influential personalities of the territory. Both historian Pereira and social scientist Barreto have acknowledged her prominent role and mentioned the very few women that have taken the lead of their family businesses or other individual projects, revealing that in the Douro the wine craft is still largely undertaken by men (Pereira, 1996: 203-211; Mayson: 2013: 27; Barreto, 2014: 195-200, 225, 252).

Ironically, in the present case, when long-time friends Sandra Tavares and Susana Esteban (Fig. 4.54) made their debut as oenologists in the Douro, they worked for two members of the ‘Douro Boys’ group (Quinta Vale D. Maria and Quinta do Crasto). Today, they both run their independent projects, Sandra in the Douro (Wine & Soul) and Susana in Alentejo (Susana Esteban). When both winemakers started working in the region, they felt they were regarded with more suspicion due to the fact that they were ‘outsiders’ (Sandra is from the Azores and Susana is from Spain), than for being women (Tavares, 2017).

Crochet is a highly considered premium DOC Douro made by bicephalous Esteban & Tavares, a micro-company founded purposefully for this project (Fig. 4.55). The grapes that make up this wine come from two different plots carefully chosen by the winemakers, which are located in the Cima Corgo region (Appendix A). The varieties used are Touriga Franca and Touriga Nacional, of 40 year-old vines, chosen to make the ‘perfect’ blend. The grapes are manually picked and then crushed, fermented and...
matured at Quinta de Foz Torto winery, near Pinhão. The wine is skilfully crafted to be a fresh and elegant expression of the Douro terroir.

Crochet was first bottled in 2013, from a 2011 vintage. It is a highly personal and enthusiastic project meant to highlight the best characteristics of particular Douro terroirs, specifically chosen to make the ‘perfect’ blend. The wine is aged for two years in casks, before it is released in the market in limited editions. As a niche wine, the quantity per year varies between 3,000 and 4,000 bottles, in accordance with the vineyards’ yields. This aspect has been highlighted with numbered wine labels (Fig. 4.56).

Beyond the winemakers’ friendship, as well as the pleasure they get from working in a common enterprise, an initiative of women’s solidarity was initially thought as part of the broad project. When the wine’s name emerged and the design project started developing, Esteban and Tavares thought of donating a percentage of the wine’s price to an organisation supporting single mums. Symbolically, a small piece of crochet would be offered with every bottle. However, up to the present date, they have not managed to put this idea into practice. A problematic issue was to get a coordinated involvement of craftswomen so that nearly 4,000 crocheted pieces might be finished upon the wines’ release in the market. The winemakers are still seeking ways of making it a project with an ethic concern, and they will continue to pursue this intention until a feasible idea emerges. They also stress that Crochet is a side project beyond their main occupation as oenologists, which makes it a challenging task altogether. Nevertheless, they do their best to find the time needed to keep the business running: inspecting the vineyards, supervising the production, controlling vinification, bottling the wine and marketing a new release every year (Tavares, 2017).

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<th>DESIGN PROJECT</th>
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<td><strong>Start date:</strong> 2013 (2011 vintage)</td>
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<td><strong>Project manager/producer:</strong> Sandra Tavares and Susana Esteban/Esteban &amp; Tavares, Vinhos, Lda.</td>
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<td><strong>Design:</strong> Rita Rivotti – Wine Branding and design</td>
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<td><strong>Creative Director:</strong> Rita Rivotti</td>
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<td><strong>Assignment outlines:</strong> Naming; visual concept; design of wine label; packaging</td>
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<tr>
<td><strong>Core values:</strong> Femininity, friendship, craftsmanship</td>
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Project overview

When the two friends came to the Douro, they felt like outsiders, because they were coming from different places and there were very few women within the academic environment. Later, they have integrated the Douro Boys’ collective and that experience has reinforced their companionship. Then, they moved on to pursue their personal projects in the Douro and in Alentejo, two completely different geographic locations.

Tavares is also the consultant to a small winery in Foz Torto, near Pinhão, owned by Abílio Tavares da Silva, and considered using their facilities to make this particular wine. The project was therefore thought from scratch, in 2011, as an opportunity for the two friends to get together and do what they enjoyed the most: winemaking. They wanted this wine to be purposefully distinct from the wines Tavares makes with her husband at their Douro winery, in Vale de Mendiz (mostly from old vines). Therefore, they picked specific vines of a different location. The grapes are vinified together at the Foz Torto winery, where the winemakers have set their equipment, and that is also where they coordinate the processes of fermentation, maturation, and bottling (Tavares, 2017).

According to both the winemakers and the designer, the naming of Crochet was the starting point that established the development of the whole design project (Fig. 4.57). The two winemakers knew Rivotti, and the latter had designed the wine labels for Esteban in Alentejo. Six months after the harvest in the Douro, while the wine was still maturing, they had no idea on what it should be called. Rivotti happened to be at the Foz Torto winery for a different work, and the three women had a illuminating, brief encounter (Rivotti, 2016; Tavares, 2017).

The winemakers told the designer the story of their wine project. They sought a specific identity that matched their understanding of this blend, and their aim was to produce a ‘different’ Douro wine. Douro wines are known for being complex, robust and intense, but the two friends were working to produce a plain, elegant, and fresh wine.

Rivotti was impressed by the care and perfectionism of Esteban and Tavares, despite the fact that this was not their main occupation, and that they lived so far away from each other. Therefore as they confided that this was also their ‘alibi’ to get together, the analogy with a traditional woman’s craftwork was almost immediate (Rivotti, 2016).
Rivotti recalls there were certain details in what the winemakers transmitted that made her establish a close link with this specific craftwork; first of all, there was the universe of a typical feminine world, as well as their main motivation: women get together to catch up, to knit, and to make crochet.

The designer also acknowledged in the oenologists’ work the meticulousness and the precision that is so characteristic of craftswomen. There were further aspects associated with crocheting that reinforced the connection: the time, the patience, the simplicity, the importance of using the right materials, the white colour, the cleanliness, the savoir faire. A technique that takes time to perfection. It was, to Rivotti’s understanding, an art, just like the art of winemaking (Fig. 4.58) (Rivotti, 2016).

As soon as the brand name was defined and registered, the project also triggered a great sense of complicity between the three women, and the winemakers were much involved in the initial ‘research’ phase. Since, ironically, none of the two is an active crocheter, Esteban’s grandmother provided part of the visual material the designers have utilised: patterns, old books, magazines, and, of course, pieces of crochet. According to Rivotti, they literally went through their grandmother’s treasure chest to find the appropriate visual motifs and monograms. During this period, there were many discussions, and it took some time until the first designs were defined (Rivotti, 2016; Tavares, 2017).

Fig. 4.58 Detail of lace crochet (left); The Crochet wine label, design by Rita Rivotti

**The design process**

Rivotti’s personal account on the design process offers some insight into her methodology. First and foremost, she considers herself a strategist. Strategic development is the first stage of any work at her studio. Therefore, a concept or a story must be established before the graphic design is constructed. And the more authentic that story is, the better.

In the case of Crochet, with a strategic concept clearly established, as soon as the initial approach was defined with the winemakers, further connections between the wine project and the handcraft started branching out, and percolating into the overall graphic design. The central idea was drawn from the
concept of a duo (the team of two women, the two grape varieties). Hence the duplicated elements, as well as the use of a symmetrical structure: two birds, two initials, the packaging designed to hold two bottles (Fig. 4.59).

At Rivotti’s studio, after the strategic kick off, wine branding developments are always considered in terms of primary packaging, and secondary packaging. Rivotti explains that the primary packaging includes all main elements of the bottle (in some cases including the bottle), such as the wine label (front and back), the cork, and the capsule; the secondary packaging concerns boxes, bags, wrapping paper, cartons. Both packaging applications are meant to be visually coherent, although at the designer’s studio this often develops into less conventional solutions. Finally, both the storytelling and the technical aspects of the wines are transposed into further communication displays: the technical sheets, the website, brochures, advertisements, etc. The aim is to achieve consistency and creativity.

A comprehensive design project, Crochet has been awarded two prizes: Pentawards 2014 (gold medal in luxury packaging category) and Lusos Creativity Prizes (bronze medal in packaging category).

The printing of the wine label has been perfected over the years. A smaller printshop has been chosen to execute the production – Etiquel, in Alfena –, due to the wine edition’s short run. Nevertheless, the work required much expertise because of the delicate blind emboss, as well as the particular varnishing and finishes (Fig. 4.60). So much care was put into the print-work that the printshop manager, Celestino Costa, was also personally involved to get it properly produced. Over the years, slight adjustments have been made to the print work, such as applying a light shade onto the pattern to add dimension to the textures (Tavares, 2017).
Particular attention in this project has been dedicated to an artefact of the secondary packaging, the double bottle box. The designer intended to communicate the idea of a very special wine, produced in limited quantity, therefore the delicate cut-out details, as well as the daring use of white colour (for packaging) are meant to suggest the preciousness of the bottles’ content (Fig. 4.59).

The box is a white cardboard case with a division inside, in which a slightly tweaked version of the principal motifs of the wine label have been individually laser-cut across the opening flap (Fig. 4.61). The result is a see-through interpretation of the crochet pattern, which reveals the two bottles nestled inside. Similarly to the wine label, the logo has been printed and highlighted with a UV varnish. The packaging has been executed at AEME manufacturers in Porto, a specialised packaging producer.
Tavares admits the box is the most expensive of all the elements of the packaging, but she acknowledges the added-value that this particular artefact has brought to the project as a beautifully crafted piece of work (Fig. 4.62). The fact that the wine is sold in pairs compensates for the high cost of the packaging. Esteban & Tavares usually produce a big release on special occasions, e.g. during the Christmas season, but throughout the year the bottles are sold mostly individually (Tavares, 2017).

A special design was also produced for the aluminium capsule, an embossed crochet motif combined with the brand logo (Fig. 4.63).
**Design and visual elements**

*Iconography*
As detailed above, a combination of duplicated or mirrored figures, letters and a decorative pattern were used throughout the wine label and the packaging design. The whole packaging layout is symmetrical, following both the aesthetic traditions of port wine and of crocheting.
To mimic the particular technique of lace crocheting, the figures were constructed as a pattern of blocks and spaces. The main elements are a geometric motif for the background surface, and on the top of the composition two birds facing each other, alluding to the project’s creators. Under the brand name, a monogram with two interwoven letters with the aesthetic style of lace crochet is laid out, which represents the initials of the winemakers (S&S).

*Typography*
According to Rivotti, a special typeface was tailored for the Crochet name brand. It is a modern stencil interpretation of Granjon Oldstyle. The designer explained that the letters were tweaked to resemble the crochet loops, and to mimic the movements of the hook (Rivotti, 2016). The brand logo is the most contrasted and visible typographical element on the packaging.
The technical information on the back label is typeset in sans serif Akzidenz Grotesk, using different weights.

*Colour*
From the outset, the use of black and white has been a fundamental visual definition within the project. This laconic choice of colours, only tempered by the silver sheen of the capsule, is shared by both the winemakers and the designer, and refers to the heritage and tradition of port imagery. The perception of a rather extensive white surface is emphasised by the use of blind embossing or cut-outs.

**Materials and production**

**WINE LABELS**
Production: Etiquel, Alfena
Description: Offset black and shade print, blind emboss, Braille varnish
Paper: Manter Tintoretto, bright white

**CAPSULES**
Production: AC Relvas, Rio Meão
Description: Aluminium capsules

**PACKAGING**
Production: AEME, Porto
Description: Laser cut on white cardboard, black print and UV varnish (on logo)
4.3 Discussion

The aforementioned case studies were chosen to illustrate the potential of an in-depth involvement of design in the wine’s visual communication, especially through the exploration of a trustful and dynamic relationship between the designers and the winemakers/producers. They also speak to the thesis’ main argument that the design of wine labels is a crucial aspect of contemporary wine communication, in particular for niche wines operating in the global market.

Regardless of the procedures involved, the size of each company or project, as well as the different outcomes and solutions that have been detailed, the examples also demonstrate that the development of a tailored design project has been highly beneficial, both in terms of symbolic and of economic value. Considering that the most recent project, Crochet, is now approaching the sixth year since it was launched in 2013, and Fabelhaft – the oldest – is close to its fifteenth anniversary, they also seem to have withstood the test of time.

The selection of the five case studies also represents the diversity that is characteristic in the Douro productive scenario, specifically: in Quinta de Tourais, a local producer that has inherited the family business and uses dry wines to escape the difficulties of the port wine environment; in Fabelhaft, a 5th generation descendant of Dutch origin, representing a long and successful tradition in the port wine trade, and a pioneer in the production of Douro’s dry wines; in Churchill’s, one of the most recent port and dry wines’ company of British origin; in Quinta dos Murças, a big producer from a different Portuguese wine region with a special interest in terroir wines; and in Crochet, a dynamic duo of women crafting a unique wine through a feminine approach.

For every new harvest, the labels of DOC Douro Churchill’s and Crochet have been reprinted with minimal adaptations, i.e. vintage year and legal mentions on the back label. The Fabelhaft, Quinta de Tourais, and Quinta dos Murças wine labels evolved differently, as the accounts have detailed. Clearly, then, the fact that all five cases are successful ongoing ventures evidences the strength of the original design propositions, thus reinforcing the contribution of design towards the projects’ sustainability.

In addition to the relationships of complicity and commitment that were observed between the designers and winemakers, what all these projects have in common from the outset, is their ability to differentiate themselves from the stereotyped or the subsuming visual communication approaches that are characteristic of the Douro wines. Contrarily, then, all five examples exhibit a distinctive visual identity, whilst remaining strategically positioned in relation to the wines’ origins, and demonstrating a solid balance between a sense of modernity, authenticity, and the Douro heritage.

Although it was acknowledged that a common approach from within the place of origin had not necessarily been sought, and regardless the more or less obvious connections with provenance, the study aimed at demonstrating that all five examples might be (re)considered as territorial branding approaches. Thus, in addition to the information that was transmitted by the main intervenients, the analysis sought the hidden cues of place of origin-related aspects.
Beyond the findings described above, which were somehow anticipated with the purposive choice of these five examples, the most unexpected outcome regards an illuminating correspondence between the case studies and the study’s methodology. In particular, connections were observed between design approaches and the five procedures identified by Nigel Cross (2006: 51-56) when describing the creative leap within the designerly knowledge: combination, emergence, mutation, first principles, and analogy. Each procedure influences a specific outcome.

As the case studies were being constructed and the data was being compiled and analysed, it became clear that these unanticipated findings would become significant in regard to the overall study, because they enable the methods within the designerly knowledge through practice.

Quinta de Tourais is perhaps the example that presents a greater variety of symbolic and aesthetic proposals, obviously determined by the paths and individual productions of the artists who have been invited to integrate the project. This opens towards an exceptional range of experimental approaches which may, of course, diminish the primary interest of preserving the connection with the place of origin. However, it could be argued that Salazar has established a robust and ingenious connection to the place of origin through the use of silk-screening – evoking a link with the heritage of port. Nevertheless, should a strategic direction be implemented, particular examples such as the careto wine label illustrated by Arménio Martins demonstrate the possibility of establishing more obvious connections with local traditions. Other examples suggesting a link with the Douro region’s ‘extinct’ crafts of wool and silk are the illustrations of Rayna di Nord and Luis Úrculo.

Finally, the case of the ‘rejected’ skull designs draws the attention to the importance of seeking further dialogue with the craft’s stakeholders, in this case, the regulative body, to debate the rigidity or the subjectiveness of the interpreted regulations against the designers’ knowledge.

The study argues that in this project, Salazar has developed a method of combination by employing the technique of silk-screening, traditionally used in port wine, in the new context of dry wines. According to Cross (2006: 51), combination develops when aspects or elements from existing designs are associated into a new configuration. The design outcome becomes an original proposition, a new combination, and is meant to articulate the advantages of both (old and new) features. In the particular case of Tourais, the method was also used to solve a practical problem related with labelling.

The Fabelhaft project is probably the most debatable of all case studies as a possible form of territorial branding, because arguably the ‘comics’ strategy devised by Alessandri is not necessarily linked with a particular place of origin, and in this case, the Douro. As such, these wine labels might work well regardless of the provenance of the wine inside the bottle. Possibly, the project might be tailored so that the stories depicted on the wine labels relate not to wine in general, as they are presented now, but specifically to Douro wines, or to a character from the Douro (e.g. D. Antónia ‘Ferreirinha’, the Baron of Forrester, etc.). However, it must be noted that such interpretations might be impeded by the actual regulations (Appendix B).
The study’s interpretation of the Fabelhaft series is less direct, though, as it acknowledges this particular design project in connection with the character of the winemaker (Dirk Niepoort). A positioning which presupposes a more open interpretation of territorial branding. This conception aligns with the perspectives of Barham (2003: 136) and Trubek (2008: 18) when they advance a notion of *terroir* which includes the *savoir faire*, as well as the character of the vigneron. Indeed, no other producer in the Douro could parallel the multilingual Fabelhaft wine labels as perfectly. The wine labels are a reflection of the winemaker: travelling endlessly, speaking many languages, expressing his characteristic dry humour. The study, therefore, suggests these wine labels are not just an independent project in themselves, but a portrait of Dirk Niepoort.

Regarding the creative process, *emergence* is the procedure that has triggered this original design project. From Anne Klenk’s interpretation of the initial concept to the epiphanic dialogue that originated the wine’s name, all aspects at the origin of the Fabelhaft wine label were unforeseen. According to Cross (2006: 55-56), emergence happens when unexpected attributes, elements or outcomes arise from an existing design. Cross notes that *emergence* can be a somewhat complex cognitive process because it implies out of the ordinary connections that sometimes result in a complete redefinition of the brief. In these situations, the relationship established between the designers and the clients is crucial, because it might be necessary to make significant adjustments to what was initially proposed. A degree of openness, of the designer and the client alike, is desirable. In the case of Fabelhaft, it meant changing the brand name and redefining the broader project.

The wine label design of Churchill’s wines is a rather straightforward interpretation of territorial branding, although it is important to remark the detail and work that was dedicated to the depictions of the estates so that a more sophisticated and less traditional Douro portrait might be produced. Just as the unusual aerial perspective of the terraces, the use of contrasting black and white imagery is also significant of an intention to create an original and ‘ownable’ image of the territory.

Considering the designerly knowledge behind Nunzi-Mihranian’s creative leap, it is argued that a procedure of *mutation* was employed following the particular brief from Campos. This process implied the incorporation and adaptation of existing identity elements in the new design. *Mutation* occurs when a particular element (or elements) of an existing design are modified to convey a specific purpose. Cross argues that this could happen for a number of reasons (2006: 53): due to the inadequacy of the feature that is being modified, upon the need of updating a particular aspect, or for the sake of visual coherence. The latter two explanations seem to suit the process of refining the visual identity and the wine labels of Churchill’s, as described by Nunzi-Mihranian (2016).

For Quinta dos Murças, the importance of expressing the *terroir* was the actual motto of the design. Therefore, as a territorial branding interpretation, it is probably of all the case studies the one that might fit all the parameters. The program reflects the designer’s concern with the physical characteristics of the place of origin, but also the existence of an important cultural heritage. The design approach is therefore
meant as a bridge between the estate’s original visionary purpose, initiated by Manuel Pinto de Azevedo, and the actual project, conducted under the terroir-orientated philosophy of Esporão. What should be highlighted as a crucial aspect of this example is the seemingly abstract or decorative interpretation of an element that is, after all, a meaningful territorial symbol. As stated by Aires, the simplicity of the geometric structure allows for multiple interpretations and to align the formal developments of the design, from structure to colour, in parallel with the oenologists' discovery and exploration of that particular territory. Hence the designer has sought not a crystallised depiction of the landscape, but a dynamic, evolving one — a symbolic element which is an essential aspect of cultural and environmental sustainability.

In this case, the creative leap was clearly determined by the methodology defined initially by Aires, from which all the elements of the visual identity and the wine label designs branched out. The plan established by Aires enables the management of a considerable amount of information, allowing to select the features that can be translated or incorporated into the design. Then, Aires applied the first principles’ procedure, which, as he has stated, is the methodology behind most of his design work (Aires, 2016). Cross claims that first principles are the backbone of design theory (2006: 54-55) and that using this methodology is probably the most straightforward and common way of developing a design process. Nevertheless, first principles are not static: the context, the circumstances or the specific constraints within each design project are variable. And they dictate the exact precepts that ought to be considered within a particular design situation.

Crochet is a humorous yet candid play on women’s roles in the Douro. It would be tempting to describe this project as a more serious critique of an established patriarchy within the Douro, or as a feminist manifesto. However, both the accounts of Rivotti and Tavares suggest that there was no apparent intention of producing such a provocative outcome. The project can be interpreted within that perspective, but it was not the primary objective. The fundamental idea the three women wanted to highlight was that of a meticulous and delicate craft. Therefore, narratives about women’s economic empowerment or autonomy are also debatable. So are the paradoxes between the local winemaking practices and wine businesses, generally understood as men’s work, and the crocheting practice (domestic, unpaid activity). The latter is usually gendered as women’s work. Both the winemakers and the designer are successful examples of women who are not dependant on others for financial support, this project being illustrative of that autonomy. Therefore, the aesthetical quality of the various elements was emphasised. The analysis also revealed the opportunities offered by the design approach to successive interpretations (such as the wine Tricot from southern Portugal).

An additional remark linked to a characteristic tradition within the Douro wine craft, the brand name’s letterwork (Crochet), which is reminiscent of stencilled lettering that used to be painted onto the bottles of port. Again, this understanding is interpretive, as Rivotti did not acknowledge a specific connection. Nevertheless, this observation informs the present discussion as a potential visual cue for the territorial branding approach.
Regarding the designerly knowledge within, Rivotti was the only designer who mentioned (without being asked) the exact procedure which enabled the creative leap, in this case, analogy (Rivotti, 2016). However, the art director did not make the connection in terms of the practicalities within the creative process. Her description of the analogical thinking translated mostly verbally and conceptually. As stated by Cross (2006: 53-54), a creative process develops through analogical reasoning when a concept, even if not directly related to the product, is associated with it. An analogical procedure may involve abstract thinking, for example, the use of metaphors or symbolic constructs that translate into unusual outcomes. The links of analogy with visual metaphors, as a core approach in design thinking and practice, are often revealed, and this is precisely the case of Crochet.

Before moving on to the thesis’ core proposition, the main implications of the case studies’ discussion will be summarised. Drawing from the study’s methodology and the knowledge within the five case studies, the discussion has evidenced that valuable and effective design solutions have emerged from the design process itself. The latter, in turn, has been determined by the specific circumstances of each project. It is essential to acknowledge these outcomes as opposed to solutions defined by apriori, standardised or homogenising branding processes.

The existence of an open dialogue, as well as a trustful relationship between designers and stakeholders, have been key contributions to the projects’ successes. As examples of the designer being more involved in the wines’ communication, these forms of engagement speak to the concept of embeddedness (Polanyi, 1945), as well as the framework of social design (Margolin and Margolin, 2002). Specifically, in the cases of Fabelhaft, Quinta dos Murças, and Crochet, the engagements have been bidirectional, with particular interventions that have contributed to a sense of belonging (from the stakeholders’ viewpoint), and of accomplishment (from the designer’s perspective).

Reporting to the study’s interrelated frameworks of disjuncture (Appadurai, 1990) and wicked problems in design thinking (Buchanan, 1992), the case studies enabled to observe that the environmental, social, economic, and regulative constraints which characterise the DDR do not impede the development of bespoke design projects. In great part, due to the fact that the core strengths of the projects’ communication relies in the intangible and distinct characters of the wines, their makers, and their environments. The designers have skilfully and appropriately handled the constraints imposed by the DDR’s regulations upon the visual aspects of wine labels. Furthermore, such constraints have not prevented the designers from creating powerful, multimodal communication artefacts combining symbolic, aesthetic and pragmatic visual elements. As such, the results are both meaningful and effective for their owners.

Restating one of the crucial problems of Douro wines, which is the difficulty of extracting profit from the costly, demanding and restrictive local system, the discussion concludes that a significant investment in design has positioned these commercial projects in the favourable circumstance of not having to compete on (production) price. This particular effect of added-value has also contributed to the companies’ ability to open up new markets for their wines.
4.4 Proposition: Imagining the territorial brand

The former section has described how five Douro producers used wine label design as a distinctive communication instrument. In particular, the accounts have demonstrated how worthy a strategy it was for them. The case studies have revealed important information on the design processes, describing each distinct development and detailing their multiple benefits: symbolic, aesthetic and pragmatic. Therefore, the study argues that these cases are exemplar of appropriate, effective, and long-lasting visual communication strategies that aim to raise the value and awareness of Douro wines. What they have not been able to demonstrate is the use of a common underlying strategy based on territorial branding, or based on the importance of place of origin.

As stated in this chapter’s introduction, wine labels can display endless forms of visual messages and in the particular context of Douro wines some stereotypes or clichés are recurrent. Yet concerning the specific constraints and challenges faced by the region’s winemakers and producers, this study argues that a shift to imagery translations of terroir can be particularly beneficial for DOC Douro wines. The Douro wines cannot afford to compete with wines from plane and less demanding wine environments. If they enter that competition, they will always be defeated (Amaral, 2014). Yet contrary to the harsh and costly physical landscape, and contrasting the difficulties that have been outlined in Chapter 2.2, in the cultural and visual landscape the possibilities are endless and possibly cost-effective.

Another argument in favour of visual explorations of the concept of terroir is that a significant number of brand names with different geographical and historical origins coexist in the Douro, a fact which can influence the consumers’ misinterpretation regarding the origin of the wines. A different line of thought regarding the disadvantage of verbal language, the complicated spelling of local grape varieties that are used in winemaking, also by legal imposition.

As some of the case studies have demonstrated, for visual projects that imply series or ranges of wines, the possibilities are illimited. The wines of Quinta de Tourais and Niepoort are probably the best examples illustrating endless variations, however Quinta dos Murças and Churchill’s also offer a range of possibilities. Even Crochet has set a continuation of the original concept – with the wine Tricot. Again, since none of these propositions was designed, from the outset, within the premise of territorial branding, the extent of this interpretation is limited to the current definition of the projects. However, possible ‘territorial’ interpretations have been advanced in Chapter 4.3.

The strongest argument for the use of the territorial brand is that it can have many ‘faces’ and be constructed or managed by a number of stakeholders such as governors, institutions, companies and individuals. Hence it serves the characteristic diversity of the Douro territory. The territorial brand can be defined as one which belongs to all the producers in a designated territory, existing only because the distinctive style of their wines can only be produced there and is impossible to replicate elsewhere (Charters, 2011: 4; Amaral, 2014). In this case, it positions the Douro wine as the
property of specific brand owners and works as an umbrella concept in cooperation with a number of individual proprietary brands or sub-brands of the same product. The territorial brand relates closely the notion of terroir, and so it is complementary to the appellation of origin framework and its legal implications.

As demonstrated with the case studies, allusions to place in wine labels can be more or less explicit. The study argues that the use of diverse, specific and inimitable visual interpretations might be beneficial for the Douro wines, therefore it is important to foster the debate between designers and stakeholders as to how these visual communication strategies might work and interrelate. Namely, as a shared value towards the construction of the territorial brand.

Before concluding this section, the potential weaknesses and limitations of the study will be outlined. The study of promising cases has focused on a very limited group of examples that, as stated, is not wholly representative of the Douro wine region. The Douro is an extensive and disjunctive territory where the tensions, the conflicts and competition which result from the fluctuating influences and powers of stakeholders continues to be felt (Pereira, 2014). As explained in Chapter 2, the Douro is a polarised and pulverised environment in many aspects, where manoeuvring the intricate system of regulations is an added difficulty.

The proposal here presented might only impact the whole wine craft if key stakeholders are actively and strategically committed towards its implementation, in particular by discussing, amending and updating the regulative system. Furthermore, the five major groups that dominate wine production and trade in the region are biased towards the broader guidelines of global trends, which, in turn, tend to implement subsuming branding strategies which are contrary to the territorial brand approach.

The focus of the study on a niche product which, despite the recent developments in the Douro, may still not have a significant impact in the region’s economy is also a potential limitation of the present study. In addition, it has been made clear both in the literature review (Quaternaire, 2015) and as a result of the presentations conducted at the IVDP (Appendix H) that the craft’s own perception of the significance of DOC Douro wines is still not consensual. This perception, combined with the lack of awareness of design, might prevent the implementation of a paradigm shift.

Finally, this thesis has not been advanced on the grounds of economic and statistical data. The argumentation is rooted in the study’s theoretical framework and in the ‘designerly’ methodology that was presented in Chapter 3. It is therefore anticipated that the lack of statistical data reporting to the designers’ professional participation in the Portuguese economic context, in general, and the Douro wine craft, in particular, may be an aspect of potential weakness.
5 Conclusion

This conclusive chapter will provide an overview of what was learnt whilst inquiring into the value of the visual communication of Douro wines, the relationship between the Douro Demarcated Region’s stakeholders and designers, and what might be gained by strengthening the professional participation of designers within the craft. The chapter will also outline the major findings of the research, and the aspects that constitute the originality of the study. The final paragraphs will bring together the study’s main objectives and contributions to knowledge, suggesting how these outcomes might inform both the design practice and future design research.

A major thread throughout has been that design encompasses ways of knowing, thinking and methods of addressing problems that emerge from the design discipline or process itself. Through demonstrative, purposive case studies, this thesis has argued that in the context of the Douro, design is an effective means to reinforce the wines’ identity and to contribute to their greater recognition in the global market. Moreover, as a cost-effective resource which enables to extract monetary value, design helps to compensate for the demanding productive circumstances that characterise the Douro. Nevertheless, the study has also evidenced that design remains a largely underestimated means within the DDR, hampering the craft of a valuable contribution towards its sustainability. Building on from the idea of the designer being more involved in the wine label creation, the study has explored two fundamental arguments:

1) The wine labels’ potential for communicating tangible and intangible characteristics through design;

2) The use of territorial branding as an added-value strategy for the visual communication of Douro wines.

A research into the existing body of literature within the field of design enabled to conclude that the few design studies that address the Douro wine craft are focused on the region’s flagship product – port wine – significantly because it still represents the territory’s largest market share (Barata, 2009; IVDP, 2016; Lobo, 2014). This study’s essential contribution to knowledge is therefore to fill a gap in the literature. Also, with the rapid changes within the DDR, the region has witnessed the recent economic progress and success of Douro’s unfortified wines (Johnson and Robinson, 2009: 172; Mayson, 2013: 246; Rebelo and Caldas, 2013: 35). As a result of these changes and the dual regulative system within the Douro appellation which continues to impose heavier restrictions on the production and the trade of fortified wines, Douro’s dry wines have flourished into a more innovative path. This path has transposed into a degree of winemaking experimentation and the latter, in turn, created the appropriate circumstances to develop new forms of visual identity and communication. The two factors outlined above justify the research focus on Douro’s dry wines.
Drawing from the two core arguments outlined above, the originality of the present inquiry has also been defined as follows:

1) By focusing on the communication strategies of contemporary DOC Douro wines (also referred to as Douro’s dry wines);

2) By establishing a link between the concept of territorial branding and the practice of wine label design.

This study started by situating the role of design within the contemporary context of the DDR, particularly the practice of communication design in relation with the wine labels of Douro’s dry wines. To acquire this knowledge, an in-depth inquiry into the history of the Douro wine craft has been fundamental, since its earliest times until the latest developments, especially concerning the evolution of the region’s dry wines. This initial exploration enabled a deeper understanding about the complex identity of the Douro wines. Also, it has allowed to portray the current circumstances of the craft, and to define the scope of design within this context. By establishing a parallel between the Douro wines’ path and the evolution of Portuguese design, the study sought to understand what is at the origin of the gaps between the two fields, not only from a practical and professional point of view, but also from the academic perspective. The various viewpoints offered by different authors enabled to identify the DDR’s grave structural problems, as well as promising opportunities motivated by the growth of Douro’s unfortified wines. Thus the investigation has sought a robust knowledge-base for the argumentation that was to be presented.

The analysis of current visual communication strategies within the DDR, as well as of the purposive case studies provided the following evidence: that added-value can be obtained through bespoke design intervention and through the dialectical insights resulting from a close dialogue between designers and stakeholders. This value can be of significance for two reasons: the economical one, by helping to mitigate the costs of wine production in the Douro; and the symbolic one, by reinforcing a distinct identity that is fundamental to raise (and to maintain) the awareness of Douro wines in the global wine market. Considering the fragile natural and social fabric of the Douro wine region, both outcomes, the study has argued, are essential for the craft’s sustainability in the long term.

Through their distinct and consistent routes, the case studies have demonstrated the significance of visual communication, in particular through the design of wine labels, a fundamental strategy within the endeavour of producing successful fine wines from the Douro. Nevertheless, the research has also demonstrated that these are exceptional examples emerging from close and dedicated collaborations between designers and the Douro stakeholders, which neither represent the typical professional participation of design, nor state-of-the-art communication within the broader craft.

To achieve widened results of added-value that might be shared by the extended craft, it is fundamental that all the stakeholders within the DDR are united under a common strategy, namely the regulative body – the IVDP –, due to its overarching influence within the Douro wines.
Responding to a major aim which was set out in the introductory chapter, this thesis has opened a discussion that bridges the worlds of design and winemaking by exploring a new direction for the visual identity of Douro’s dry wines. Central to this debate is the argument that territorial branding should be used strategically, i.e. as a key concept in the wines’ visual communication.

The study’s contributions to knowledge can be outlined as follows:

- Establishing interdisciplinary research and design;
- Advancing a contribution that opens a new area for discussion;
- Testing existing design theories through design practice;
- Contributing to the repository of Portuguese design artefacts.

Although a practice-based research did not fall within the remit for this thesis, it is understood as a useful continuation of the present inquiry, given that it might provide real-world evidence on the benefits of the use of a strategy of communication built upon territorial branding.

Future studies within the DDR might also expand this theme by focusing on different design artefacts and communication platforms, e.g. wine bottles, specialised publications, and digital media.

Given the extensive range of possibilities and the current dynamics of niche markets within the wine world (Goode and Harrop, 2011: 17), the discussion here initiated could also be continued and advanced in further studies to consider other viticultural regions, in Portugal or elsewhere.

To conclude, this thesis has addressed a number of significant topics which show that despite the difficulties of producing wine in the Douro, as well as the pressures set by the global market, design is a cost-effective and valuable resource within the DDR which is still under-explored and under-used.

The authors, the specialists and the main intervenients that have been referenced in this study advocate a similar proposition for the development and sustainability of Douro wines, in the perspectives of oenology and viticulture. Namely, to value the links with place of origin. Accordingly, the present dissertation argues that fostering the dialogue between designers and the Douro stakeholders on the importance of territorial branding should first and foremost respond to the specific demands and challenges within the craft. Then, to employ a coherent underlying strategy for the wine label design.

The continuous discussion might also contribute to an advanced and common culture concerned with ethics and value, and to the improvement of the perceived imaged of Douro wines, especially in the external market. Considering the difficulties and the uncertainties of producing wine in the Douro, as well as the pressures set by the global market, the study argues that a design-led strategy shared by the different stakeholders, might, in the long-term, become a valuable and robust resource for the Douro wines, as evidenced at a micro-scale in the individual case studies.
This is both due to the availability of design professionals in the region and to the relatively low costs of implementing visual strategies through wine labels, especially if compared with other forms of investment such as R&D, viticultural and oenological practices, and even marketing and publicity.

What this inquiry aimed at demonstrating, within the complex system of the Douro, is that design is a powerful tool to raise the value of Douro wines, which may help to mitigate specific difficulties related with profit and return.

The study claims that strategic explorations of design exist in the Douro, but they are the exception, and not the rule. Such strategies, informed by the concept of territorial branding, might contribute to a general raise of awareness on the value of Douro’s dry wines, and thus contribute to the craft’s sustainability – eventually benefitting other wines within the region.
Appendices
A  Maps of Douro and relevant locations

Fig. A.1 Natural framing of the DDR (source: IVDP)

Fig. A.2 Geographical limits of the DDR in 2017; Area: 247420 hectares (source: IVDP, Upon annex to Legal Decree nr. 173/2009, August 3)

North: 287.710 507.340; South: 283.734 439.787; East: 316.167 464.680; West: 218.363 402.837
Fig. A.3  Location of the five estates

1. Quinta de Tourais
2. Quinta dos Murças
3. Quinta de Nápoles (Niepoort)
4. Quinta de Foz Torto (Crochet)
5. Quinta da Gricha (Churchill’s)
**B DDR Legislation**

The following selection concerns the legal decrees that affect the design of wine labels, directly or indirectly. The most important mention is made on legal decree 242/2010. This document specifies the precepts, the measurements and prohibitions regarding the visual elements on the wine labels. The complete document is composed of 10 pages, of which page 7, stating the prohibitions, is displayed below. The articles that are relevant to design work have been summarised on the following pages.

Other relevant legislation is mentioned further.
Legal decree 242/2010

Article 2
States the definitions of labels, packaging and the visual field.

Article 3
Defines mandatory indications.

Article 4
Defines facultative indications.

Article 5
Defines official mentions and designations of different wines within the DDR.

Article 6
Defines the typeface body and size for particular indications.
Defines visual field.

Article 30 /Prohibitions
1. The labelling of any indications contrary to applicable legal provisions, which infringe the ownership of distinctive signs or that are offensive to public order or morality shall be prohibited.

2. It shall be prohibited to affix to the labelling any particulars which operators do not prove to be correct.

3. The labelling of indications, designations, names, terms, marks, names, figures, symbols, or any other signs or descriptive material which may mislead the consumer as to the nature, quality, quantity, provenance or other characteristics of the wine or which may adversely affect the distinctive character or the prestige of the designation of origin, geographical indication or traditional expression.

4. Except for existing situations, it is prohibited to affix to the labelling names or designations referring to historical personalities as well as saints or other religious figures.

5. The use of a code number to identify the bottler shall be prohibited.

6. The provision of the particulars entered on the labelling may not prejudice the designation of origin or the geographical indication or cause consumer confusion, in particular as to the origin, nature or quality of the wine. The optional particulars may not be arranged in such a way as to create confusion in the mind of the consumer, in particular when compared with the mandatory particulars.

Article 32 /Approval of labelling
1. The wine may only be marketed, put into circulation or dispatched after its labelling has been approved, and the holder of the registration of the wine to which the labelling corresponds must send a copy of the IVDP, IP.

2. Without prejudice to compliance with the provisions of the preceding paragraph, a preliminary assessment of the labelling may be made, based on a ‘model’ sent by any means of communication, preferably by electronic mail.

3. The approval of the labelling by the IVDP, IP is intended to ensure compliance with the specific provisions applicable to wine with a designation of origin or geographical indication, as well as national and EU regulations applicable to food products.

4. Except as otherwise provided and without prejudice to applicable EU and international law, the approval referred to in the preceding paragraphs shall not affect the compliance of the economic operator with the specific legislation of the country of destination.

5. It is understood that the labelling of wines with a designation of origin or geographical indication is approved when:
   (a) having been referred to it in accordance with paragraph 1, the economic agent has received an official letter from the IVDP, notifying its approval; or
   (b) having been examined in accordance with paragraph 2, the economic operator received a favorable reply from the IVDP, IP and provided that the agent delivers a copy of the final label in all identical to that of the model.
**Legal decree 173/2009**
Extends prohibition of trading bulk wine to DOC Douro wines (Article 42).

**Legal decree 190/2001**
Establishes the statutes of the designation DOC Douro. Article nr 15/3 refers specifically to the need of submitting the labels to the approval of the CIRDD.

**Legal decree 254/98**
Signals date as the timely moment to acknowledge the official designations of ‘Port’ and ‘Douro’, to ensure that they are adequately used within the new reality of the DDR.

**Legal decree 264-A/95**
Determines the (temporary) prohibition of selling bulk wine outside the DDR. Refers only to port wine. The measure emphasises the need of ensuring the authenticity of the product and the prestige of port wine.

**Model of wine label**

![Model of wine label](image)

A ‘visual model’ for a wine label available at the IVDP website, indicating mandatory information.
This template does not exclude knowledge of legal decrees, which contain more detailed information.
C Portuguese design 1985-2014

The 1980s was a relevant decade for Portuguese design and the Douro wine craft alike. To the former, it was when the Portuguese Design Centre was established with the aim of raising the public awareness of design. To the latter, it was the decade that signalled the beginning of the ‘Douro revolution’, and the growing notoriety of Douro’s dry wines. The selection of events below is complementary to section 2.3 and helps to outline a parallel between the two paths. The time frame concerns the scope within which the present research has been conducted.

1985. CPD, the Portuguese Design Centre, is established.

1990. The Portuguese Designers Association (APD) becomes a member of BEDA (Bureau of European Design Associations).

1994. The exhibition Design Lisboa ‘94 takes place in Centro Cultural de Belém (CCB), curated by Tomás Taveira. The low representativeness of participants, and an ‘elitist’ approach, were controversial (Bártolo, et al., 2015, Vol 5: 9, 47). First directory of Portuguese design, Design & Designers, Portugal, published by APD. The catalogue displays examples of different design areas and a more balanced choice between the works made by architects and those made by designers (ibid).

Poster exhibition Uma Imagem do Vinho (An image of wine), curated by APD and held at Instituto Superior de Agronomia (Agriculture School) in Lisbon.

1995. Portugal hosts the ICOGRADA congress in Lisbon (from designers to designers).


1999. Centro Cultural de Belém (CCB) in Lisbon opens the first museum dedicated to design. The ‘Design Museum’ is constituted by a private collection: 200 furniture and luxury objects from the 1960s and the 1970s.

1999. First edition of Experimenta Design biennial in Lisbon, curated by Guta Moura Guedes and dedicated to design culture (conferences, exhibitions, workshops, events)

2003. USER congress, organised by CPD in Lisbon, a design event ‘from designers to designers’.


2006. Designers acquire their specific taxpaying classification (code 1336 of the IRS), a significant achievement towards their professional recognition.

2009. MUDE, the Museum of Fashion and Design opens in Lisbon’s historical downtown. Showcasing the Francisco Capelo collection (formerly exhibited at CCB), the museum displays a permanent exhibition with a more comprehensive collection of objects. According to president Bárbara Coutinho, MUDE’s mission is to boost the portuguese design and fashion scenario.

2011. Extinction of APD, the Portuguese Designers’ Association

2012. Manifesto para o design português (A manifesto for Portuguese design), signed by 24 signatories.

2013. Compulsory closure of the Portuguese Design Centre.

D Survey of branding and wine labels

Fig. D 1 Abraço Wines; AC Mesão Frio; Adega Vila Real; Alves de Sousa; Alteia wines; Borrelho; Bulas
Fig. D 2  Burmester; Caves Santa Marta; Chaquedas; C. da Silva; Castelinho
Fig. D 3 Churchill’s; Companhia dos Vinhos do Douro; D’origem; Douro Lovers; 5 Bagos – Palato
Fig. D 4 Douro4U: Esmero; Quinta de Tourais; Terrus; Quinta da Prelada; Aneto Wines
Fig. D 5 Douro Boys: Quinta do Vale Meão; Quinta do Vale D. Maria; Niepoort; Quinta do Crasto; Quinta do Vallado
Fig. D 6  Foz Torto; Grambeira Wines; Lavradores de Feitoria; Maritâvora; Manuel Hespanhol/Douro Family
Fig. D 7 Montes Ermos; Poças Júnior; Porto Réccua; Quevedo Port Wine; Quinta dos Avidagos
Fig. D 8 Quinta da Carregosa; Quinta de la Rosa; Quinta d’Azinheira; Quinta da Casa Amarela; Quinta dos Castelares; Quinta da Devesa
Fig. D 9 Quinta do Infantado; Quinta das Lamelas; Quinta Maria Izabel; Quinta dos Murças; Quinta D. Matilde
Fig. D 10 Quinta Nova de Nª Senhora do Carmo; Quinta do Passadouro; Quinta do Pôpa; Quinta de Porrais
Fig. D 11 Quinta do Portal; Quinta do Sagrado; Quinta Santa Eufêmia; Quinta da Sequeira; Quinta do Tedo
Fig. D 12  Quinta Vale d’Aldeia; Real Companhia Velha; Romaneira; Sogrape
Fig. D 13 Symington Estates; V. Leite de Faria; Valle do Nídeo; Vallegre; Wine & Soul/Crochet
E Survey of literature

Aiming at perceiving the occurrence of the thesis’ focus in the existing scientific literature of fields other than design, a search was conducted across the platform Web of Science Core Collection under the topic ‘wine label design’. To situate these occurrences within the thesis’ delimitations, only the articles published between 2008 and 2018 were considered. Of the resulting 95 articles which were found, the following have been selected for their correlation and possible connection with the thesis’ main themes.


180

2015


2016


2017


F  Interviews

This section includes the personal statements of the study’s key informants, as well as those of the case studies’ designers/art directors, which were presented in Chapter 4.2. They were captured through in-person, phone or email interviewing.

The transcripts of personal accounts of other relevant actors and informants (listed below) have been compiled in a separate record of field notes and visual documentation.

This separation was made to emphasise the thesis’ focus on the case studies, as well as the design processes involved in each example. Also, to provide a more specific and coherent information account.

All the referenced conversations are acknowledged in the bibliography.

The interviewees have consented on the publication of the transcripts for the purpose of the present research. In some cases, parts of transcripts have been omitted upon the interviewees request.

The recordings, notes and transcripts generated during the encounters, visits and conversations will be protected and stored on a private computer and on a complementary field report (hard copied).

Throughout the course of the PhD, as part of the analysis process, argumentation and examination, sections of these documents have been used and may be discussed, but they will remain in the possession of the author at all times. After completion parts of the research, including interviews, may be published or delivered as essays and/or talks.

Key informants
Bento Amaral (oenologist, head of Wine Tasting Chamber at the IVDP)
Gaspar Martins Pereira (historian, head of research at the University of Porto)
Henrique Cayatte (designer, former president of CDP – Portuguese Design Centre)

Designers/Art Directors
Miguel Salazar (Quinta de Tourais)
Cordula Alessandri (Niepoort)
Daniela Nunzi-Mihranian (Churchill’s)
Eduardo Aires (Quinta dos Murças)
Rita Rivotti (Crochet)

Main intervenients of case studies
Fernando Coelho (winemaker/owner, Quinta de Tourais)
Dirk Niepoort (winemaker/owner, Niepoort)
Maria Emília Campos (joint CEO, Churchill’s)
João Moreira da Silva (oenologist, Quinta dos Murças)
Sandra Tavares (winemaker/owner, Crochet)

Other informants
Alexandre Mariz (viticulturist, Symington Estates/Douro Primer)
Alfredo Silva (label approval main supervisor, IVDP)
Celestino Fonseca (designer, Equador)
Dominic Symington (Douro producer, Symington Estates)
Dorli Mühr (PR and manager of Douro Boys group/communication, Wine & Partners)
Edgar Silva (designer, Quinta de Tourais)
Luís Mendonça (designer, Alkymist)
Paulo Vinhas (curator, Quinta de Tourais)
Susana Marques (curator, Setepés)
Tim Hogg (scholar and director of Wine and Vine Innovation Platform/UTAD)
MF: How would you describe the ‘Douro revolution’?

BA: Until the mid-eighties the Douro wine market was dominated by port; from there on, and for several reasons – including Portugal becoming a member of EEC, government financed research for local viticulture, the creation of the oenology course at UTAD, amongst others – the necessary conditions to produce new table wines were established. So, from the mid-nineties on, one can say the table wine market in the Douro was launched, issuing wines of fine quality. These wines are probably more difficult to produce compared to port wines, because they are not fortified and thus cannot hold for a long time.

I would say this so-called ‘revolution’ had a technical beginning in the adegas, followed by further developments in viticulture. In the last 10 years, the dry wines of the Douro started gaining projection and notoriety outside Portugal, mainly due to – and this is what actually what I call the revolution – new ways of communicating wines.

Pioneers and probably the two most interesting cases are the Douro Boys and Lavradores de Feitoria. These are relatively small producers that have associated themselves to share resources for producing their wines, but also for the purpose of consultancy (oenology) and communication and, of course, to reduce the costs of production – an association similar to traditional cooperatives, but with a more conscious and defined strategy. Founders and references are Dirk Niepoort, António Barreto and Olga Martins (all linked to Lavradores de Feitoria). Other groups with similar strategies: Douro4you, Douro Family Estates, Independent Winegrowers Association (the latter not from the Douro).

I think it is interesting that in a country currently dealing with difficulties, people are joining forces to overcome these constraints.

MF: So, according to you, is the ‘Douro revolution’ expression appropriate to refer to these recent developments, or is it just an exaggerated description created by the media? – Is there a significant change, or is it too early to say so?

BA: I think there is actually a sustainable development, and I mean also a cautious transformation, especially in terms of quantity.

For big companies like Taylor’s, Fonseca, Croft, etc., that have been based on port for three or four generations, it may be difficult to take a leap into a new product. For them, the major strategic investment is still on port. Symington Estates, which rely on port as their main business, have acknowledged that dry wines could be an interesting investment, and created a niche for it within the company’s global investment. Dry wines are also a way of providing an easier and quicker return for the region. Frankly, today, I think the way things are happening, and especially the way these wines are being perceived outside Portugal, it is unlikely they will ever fall.

Yesterday I had a meeting with American wine journalist Matt Kramer, from the Wine Spectator – one of the most prestigious wine magazines in the world. He has been living in Portugal since April and he told me how exciting it was to witness the birth of this ‘new’ Douro as the most recent great wine region in the world. He had watched other countries gain notoriety: Italy, Spain, New Zealand – and now Portugal. Yet his wife complained: ‘Yes, the original idea was to come to Portugal, but since we’re here we have never left the Douro!’

While in Portugal, Kramer has attracted many influential people, companies and investors to the Douro. A representative of one of these companies, based in Silicon Valley, has asked: – How on earth did anyone think one could make wine in this region?

Matt Kramer then told a little story – one that is told as a nursery tale in America (and in other countries):

A threatened village had to fight a monster and a little boy offered for combat. The village leader came to encourage him and say goodbye, but before delivering his last words, the boy had left for the fight, and he actually killed the monster. When he came back, he asked the leader what the advice was. And the leader said, ‘I was going to tell you how impossible a task that was’.

That absolutely relates to the Douro: why would these people think of planting vines in a place like this, where it is so difficult to work, with such slopes, extreme temperatures and virtually no soil?

– Surely, no one told them it was impossible! [laughs]

This is meant to explain there is something passionate about this region, something that we should be able to communicate; the natural beauty of it, the fact that it is a UNESCO World Heritage Site, the whole region and not just the ‘isolated’ wine. I am actually quite convinced that all of this matters when it comes to indulging in a wine.

MF: It is interesting that you mention it, because it leads to one of my questions regarding the notion of terroir; would you say it applies to the Douro region as something that is more than the physical, technical definition? Is it a broader notion that includes intangible aspects, such as cultural and symbolic aspects?

I ask this because such notions can have a major influence in visual communication.

BA: In the wine world we often refer to terroir solely to designate the physical characteristics of a certain place, such as soil, climate and geology, but for the Douro, I’d rather use the Portuguese expression território (territory), I think it is more appropriate in this case, because when we use this word, we generally mean also the culture of the region.

MF: Does this relate in any way to the famous ‘Mondavi affair’ in Aniane, Languedoc? In terms of what constitutes the identity of a wine? (This episode is explained by Amy Trubek in her book “The Taste of Place”)

BA: Listen, this may sound contradictory: I do believe a Burgundian cannot go to Bordeaux and make a bordelaise wine. But in the Douro, we are on the razor’s edge. There is indeed a ‘new school’ of successful oenologists – most of them around my age – that have travelled around the world and are keen to apply new ideas. However, it is fundamental to learn from what we have built for the last 300 years. If we try to replicate in the Douro what is being done elsewhere, there is no doubt we are going to lose.
The Douro is an extremely difficult region for viticulture, it must be worth it. If we try to do ‘plane’ wines, plane regions will beat us 10-0. We have something unique, we grow 115 wine varietals, Burgundy grows two – one for red wine and one for white wine. Our uniqueness lays in this patrimony. For me this is very exciting because we still have so much to do, so much to experiment, so much to learn and still protect our difference... We simply cannot lose time and effort by copying others.

MF: Is that common in the Douro? To copy other regions’ wines?
BA: I wouldn’t say it is common, but it does happen. And in some cases, I am not in total disagreement, such as ageing wine in new casks. Traditionally, the Douro and port wines are aged in old casks. However, for dry wines it is known that new wood ageing will add flavours and aromas that are easily recognised by the consumer, which makes this technique more suitable for this kind of wine. This was probably imported to the Douro from France; just like in the 1950’s, when Fernando Nicolau de Almeida (with Barca-Velha) first tried to demonstrate that he could produce fine table wines in the Douro. Back then, he would transport ice in trucks from Porto to the Douro – probably at the cost of losing half of it on the journey – just to prevent the grapes from fermenting at high temperatures. This was a technique he had learnt on a trip to Bordeaux. By that time, he used Portu- guese oak for the casks, but later changed it to French oak, considered to be of better quality.

The boom of using new wood for casks started after World War II. Many old casks had been destroyed, so there was no way but to use new ones, and these were the circumstances in which American soldiers got used to the particular flavour/aroma of European wines, so when they got back they tried to reproduce similar conditions. These are just different examples of how wine techniques can be spread across the world.

Going back to the Douro ‘revolution’, last year for the first time a Douro table wine of 2011 got 98 points on Wine Spectator. 2011 has been considered an exceptionally good year. What I mean is that the ‘revolution’ has definitely happened, we are just starting to see the results.

MF: Is the port wine market more conservative than that of dry wines?
BA: Yes, I believe the port market is more conservative, but there is still space for innovation. I am thinking of rosé port, for instance, which appeared around 2008.

Port has at least 17 different styles that have changed throughout the times; it used to be transported by boat to Vila Nova da Gaia and aged in the city cellars; the glass bottle is relatively recent in the business, and its size is just about what the glassmaker could blow in one go to make a bottle. That’s the story of the volume of the first port bottles as I have been told, I hope I am not telling you lies. [laughs]

Some, like Niepoort, used demi-johns to age port and that was also an innovation. In the 1990s, robotics was introduced in the lagares to help crushing the grapes and to mimic the pressure of human feet. And new cocktails have been created lately to seduce a younger generation of consumers. Personally, I don’t think this is the most appropriate way of drinking port, but I admit it helps competing with Vodka, Gin and similar spirits; I believe it might help to engage new consumers.

MF: What about the role of pairings, even ‘difficult’ pairings such as asparagus and chocolate?
BA: Pairing is a good way of innovating, and particularly chocolate and Port is, to me, a heavenly combination. Asparagus are difficult to pair because they contain a compound called coumarin that can make wine taste a bit metallic. Egg desserts, chocolate and some cheeses are tricky combinations because of the fat film they leave in your mouth. You then need a wine with strong alcoholic volume to sort of ‘cleanse’ your mouth in the first place, and then to balance the intensity of such foods. That is why vintage port and Stilton cheese are a classic combination.

I simply love chocolate and port tastings [laughs].

MF: Can new pairings open a range of new opportunities, even in conservative markets?
BA: Indeed. At the IVDP that is definitely our understanding and we support this idea as a new way of communicating in the Douro. We organise courses on food pairings in which a whole menu is prepared to be paired with Douro wines – and it is mandatory that the dessert will be paired with port. The purpose of these initiatives is to get the attention of chefs and restaurant owners on the importance of pairings, because there is a double benefit when food is enjoyed with the right wine.

The glass is another ‘communication’ issue we care for. Wine glasses have changed a lot. The ‘Álvaro Siza’ glass is probably the most adequate glass for drinking port; it was a collaborative project between architect Siza and oenologists from IVDP; the oenologists took care of the upper part of the glass, to produce the right vessel for taste and aroma, and Siza designed the bottom part; it was subject to a number of tests and rehearsals but the ultimate purpose was to provide maximal pleasure to the consumer. Both a tasting and an aesthetic experience.

Another issue we try to communicate is the right temperatures for serving/tasting wine. Traditionally, Douro and port wines were served at room temperature; but the fact is that ‘room temperature’ in the Douro could mean 35°C in Summer and today we know that no wine should be served above 16° or 18°C. So, we have to keep wines refrigerated in order to be able to serve them at the right temperature.

To explain this, we make this simple experience: we serve the same wine in two bottles – one that is 28°C because it is next to the expresso machine and the other that is 16°C because it has been refrigerated. And people always prefer the one that has been refrigerated because it is much more pleasant, not so sugary; by being able to compare themselves, they understand much better what the right temperature ought to be.

Other communication problems that we have: consumers seek ‘light’ products. The ‘light’ culture is a serious challenge. Wine is alcohol and sugar, there’s nothing ‘light’ about it. We reckon this is a difficult communication problem.
MF: But isn’t any wine essentially incompatible with the ‘light’ culture?
BA: Indeed. And port wine even more, because it is more alcoholic and sweeter.

MF: A question of moderation, maybe?
Because ultimately, ‘light’ means to abstain from drinking any alcoholic beverage...
BA: Absolutely. In my opinion radical ‘light’ is the denial of pleasure – and that includes chocolate! [laughs] – but the fact is that port wine goblets are much smaller than table wine goblets.

MF: Is that an explicit way of addressing the problem?
BA: Not really, port wine goblets have always been smaller. But you might look at it as a simple, ‘visual’ way of saying that you should ingest less quantity of that product.
Now, temperature is a different matter – when you drink a refrigerated wine it feels ‘less’ alcoholic and less sweet. This a synaesthetic reaction, not a real one, but it does happen.

[Maria Cabral (MC) comes in, and we are introduced to each other, the conversation is contextualised]

MF: I would now appreciate your opinion on a different communication problem. A while ago, in Edinburgh, I was asked to make a brief presentation about a topic within my research. I chose the Douro terroir. When the presentation was over, there was some time for comments and questions. As the Q&A developed, I learnt that most of the audience knew what port wine was, but they had no idea that it was a Portuguese product. And there was very little awareness on the Douro either.
BA: Who was your audience? Were they British?

MF: Maybe half of the audience was British, I am not sure. It was rather ‘mixed’, mostly PhD students: Asian, Middle-eastern, northern and southern American, European – Greek, Italian, Dutch...
BA: And most of them knew what port was?

MF: Yes, I had the perception that most of them knew what port was, but they could not establish a link between the product and its provenance. I thought that was quite relevant to my research – a real communication problem.
BA: I didn’t realise that. It is appalling. It sounds like a huge problem to me!
But I think we have to distinguish Port from the other Douro wines; for instance, if I told you that New Zealand is the latest ‘big thing’ in the wine world, would that ring a bell? Probably not. When we talk about the ‘Douro revolution’ we know it’s something that has just hit the wine world. It will probably take decades to reach the general consumer.
Port wine and the Douro wines are two separate things.

MF: Would you say design work, and design strategy is commonly employed in the Douro?
BA: I doubt it is so.
MC: Well, it depends on the companies too; some are quite avant-garde, and employ design, but most of them are probably not.
BA: I am thinking that Quinta do Vallado decided to build a new, modern ‘adega’ in schist; you know schist is the stone of the Douro. But to build the whole ‘adega’, most of that stone had to be imported from Brazil! How awkward is that?

MF: That is intriguing.
BA: I suppose the aim was to integrate this building in the surrounding environment, which is a growing concern of many companies now, understandably.
Vallado is a member of the Douro Boys. Someone that had a huge responsibility in the success of this group, I have to mention, is Austrian PR Dorli Mühr, Dirk Niepoort’s ex-wife [Maria Cabral agrees]; she was already in the food and wine business as a PR for Segafredu, Mondavi and others. I believe she was the person behind the Douro Boys ‘concept’, as well as their particular way of communicating the Douro.

MF: I have noticed Niepoort’s design strategy is quite unique.
MC: I believe that is Niepoort’s own path; through her agency, Wine & Partners, Mühr is still working closely with the Douro Boys – but not with Niepoort specifically.

MF: Throughout my research, the Porter report is a constant reminder. What was the actual influence of this document within the Douro? Were the recommendations in it ever followed?
BA: Which recommendations do you mean?

MF: For instance, not to differentiate the wine regions in Portugal; to invest in ‘Portuguese wine’ as a whole; and to focus on single varietal wines.
BA: No, I don’t think so. Maybe it has influenced some economic agents. New World wines communicate through single wine varietals and Old World wines communicate through wine regions. I don’t think this is going to change. And I am still learning; yesterday Matt [Kramer] told me the story of this Italian winemaker, Angelo Gaja, who has influenced fine Italian wines (I don’t mean Chianti or Lambrusco – ‘pizzeria’ wines!). Gaja started blending French varieties (such as Cabernet Sauvignon and Cabernet
Franc) in his own wines. He was very criticised and questioned for this strategy, but he always maintained that if these wines would ever catch the world’s attention – which they did – then the benefit and focus would be directed towards the region and not towards the variety.

I do think that today the educated consumer looks for the ‘different’ [wines], not just for Cabernet Sauvignon or Chardonnay. In the Douro, winemakers also experimenting with blends. Noval uses some Syrah; Real Companhia Velha uses Cabernet Sauvignon; Ramos Pinto uses both Cabernet Sauvignon and a bit of Sauvignon Blanc in their DOC Douro Bons Ares; – [MC mentions Dirk Niepoort] – and yes, Dirk uses some Riesling for his dry whites, because he enjoys German wines so much.

There are, indeed, a number of experiences. Twenty years ago, Quinta da Pacheca planted foreign varieties in the Douro and got some recognition for that. I believe single varietal experiences such as Touriga Nacional are gradually disappearing now. The experience has been pedagogical, and I admit it might be interesting to have single varietal in a company’s portfolio. However, if a Douro company presents their top wine as a single varietal, I think they’re missing the point.

I also see companies making a great quantity of different wines; it is probably very exciting for all these winemakers and oenologists, but I believe this will eventually create more difficulties for the communication.

MF: Is that a problem for reaching the external markets? Small quantities, much variety...

BA: Eventually, yes. That’s why ViniPortugal created Wines of Portugal. To have a critical quantity of wine that enables us to operate in bigger environments such as the Chinese market.

MF: Is ‘Wines of Portugal’ a marketing strategy?

BA: Yes. I think ViniPortugal has made a real effort in communication – and I say this because they have often reached us for help –, organising events and workshops for different audiences. What happens in the Douro is that every bottle has a warranty seal and that has a cost (a tax). That cost is meant to be used for [institutional] promotion. Port and Douro wines are promoted by the IVDP, and ViniPortugal handles the promotion of all other Portuguese wines (except Madeira).

MF: Does that mean that any promotion/communication issued by ViniPortugal should not include Douro wines?

BA + MC: Well, it should not include port. They usually include Douro wines, but that is not mandatory.

MF: I don’t understand. ViniPortugal is the main Portuguese agency for the wines’ promotion, isn’t there a gap here?

BA: You are probably right. There might be an overlap of functions between the two institutions, but I must say I am not too confident on this subject. Both presidents of the IVDP and ViniPortugal get along very well, which explains a number of mutual collaborations.

MC: That’s right, we don’t see each other as competitors. We do have a number of collaborations. We share experiences, events, wine courses, journalists’ trips, etc.

MF: Why are the two institutions separate, then?

MC: Promotion is part of IVDP’s mission since its foundation, and ViniPortugal is a much more recent organisation with a wider spectrum of action.

BA: And that is not all: Douro producers pay a specific tax for this purpose [promotion] and I don’t think they would like it to be diluted to promote, say, wines from the Alentejo. I think it also regards a regional interest for local companies.

MF: And do you have appropriate means for the promotion and communication?

BA: Not at all, they have a much higher budget.

MC: And they don’t have the same constraints we have here, not only financial but also political constraints.

BA: It is not an easy task. I think we have to be the advocates of few but very important things: territory, tradition, history and quality. We also have to reflect on intangible aspects; on what we can learn from that. Is it relevant for the broad craft that the Douro is also the home of port? Would Douro wines be as notorious if port wines weren’t there in the first place?

MF: As our conversation is coming to an end, what comes to your mind in terms of ‘good communication’ references in the Douro?

BA: Dirk Niepoort, João Nicolau de Almeida, Vito Olazabal (Quinta do Vale Meão), David Guimaraes, Paul Symington, António Aregilhos, Christian Soely, Cristiano Vanzeller...

MC: For a certain niche of new communication (i.e. bloggers) I would also mention Óscar Quevedo...

BA: Yes, the ‘New Douro’ could be important an important reference. But then, again, wine journalist Matt Kramer was telling us yesterday evening:

– What do you mean, to communicate the ‘new’ Douro? People don’t even know what the Douro is!

MC: It’s good when someone from the outside makes such comments.

BA: Yes, and he added:

– ‘New’ is when something is bad and you want to change it.

There is no image whatsoever of the Douro – so what do you mean, the ‘new’ Douro!
MF: Do you think the port wine ‘parentage’ is a relevant issue towards the definition of this product’s identity?
GMP: I don’t think I quite understand what you mean by ‘parentage’.

MF: I mean the origins of port wine, who ‘invented’ it, in this case probably either the British or the Portuguese. I ask this because I have encountered this topic many times in my research, and I wonder whether it matters for the identity of the Douro wines.
GMP: Well, it is a difficult answer, because port wine wasn’t exactly created in one day, it was developed along centuries. And the wine that people drank in the 18th century was certainly different from what we call port wine today. And then there were so many different varieties and styles of wines, dry, sweet, etc. This until the late 19th century. I have no doubt that the so-called British ‘parentage’ of Port wine is a nationalist, chauvinist appropriation. Why? Because until the late 19th-century the wine was produced by the Douro farmers and sold to the British traders. They didn’t buy the grapes to undergo fermentation, they bought the finalised drink. The British were essentially traders, not producers. The farmers were their main ‘clients’. On the other hand, the port trade has been dependant on the British market (and some others) for a long time. To some extent, this has defined which was the optimal type of wine for the trade. So, the first regulations were also established to create a ‘model’ of wine, the ‘ideal’ port wine. For centuries this has also influenced the designation of the wine – port wine – which was used solely for exportation. To me, the wine bears no essential connection with the city of Porto and this designation is highly debatable. I understand that ‘port’ does not refer to the city, but to the harbour from which the wines were shipped. The Portuguese did not use this designation to refer to this wine, they used many other expressions like ‘shipping wine’, ‘Feitoria wine’, ‘fine wine’, ‘sweet wine’, etc. In sum, wine for exportation.

MF: But what happened is that the ‘port wine’ designation prevailed...
GMP: That is correct. And there is also the issue of the imitations. So, in the case of port wine, throughout its history we know that supposedly ‘port wine’ was produced everywhere in the world. At least until the protective system was established and perfected. This phenomenon also happened with Jerez, and we know that so much Sherry was produced in England before the current regulations were imposed.

MF: Is it still an ongoing debate?
GMP: Yes, absolutely. In more liberal markets companies come up with all sorts of ‘tricks’ to get away with imitations. I have recently travelled to Brazil, and I noticed the wine displays emphasised the Portuguese flag and architectural icons of Portugal; therefore, I believe that for the Brazilian consumers those symbolic representations may be more meaningful than, for instance, the IVDP warranty seal.

MF: Why is that important?
GMP: Well, Brazil is certainly not the best example, but for many people around the world, Portugal is quite unknown. For many northern Americans, for example, Portugal is actually a province of Spain! Indeed, according to the Library of Congress classification, Portugal is catalogued under the ‘Spanish’ section! True, we are both part of the Iberian Peninsula, but still two different countries...

MF: Do you mean that type of misunderstanding extends to the Douro as well?
GMP: Well, let me tell you this. Fifteen years ago, I have curated a number of exhibitions about port wine abroad, promoted by ICEP in Holland, Brazil, Belgium, etc. And I was intrigued by the resistance of certain administrative bodies in emphasising the Douro as an independent region. The idea was always to subsume the regions into one broad notion of ‘Portuguese wines’. I once witnessed an incredible situation at the Olympia wine fair, in London: a number of Portuguese wine shelves sponsored by the ICEP (a governmental institution) were located in the Spanish area! At the time, I was very critical, but the people in charge did not seem very concerned. So, I believe this is certainly a political issue, too. It is not just a problem of other people’s lack of awareness. This will also take us back to an old problem of the Douro wines, which is the fact that their identity has always been shaped, somehow, by the commercial sector. And that is probably why the Douro people resist the expression ‘port wine’, because it underestimates and devalues the actual provenance, which is part of the wine’s identity.

MF: But the ‘port wine’ designation is definitely ingrained in people’s minds, don’t you think?
GMP: Yes, and I doubt that is going to change now, so we have to address the problem differently.

MF: Do you think it might be a question of strategy, then?
GMP: There is no doubt it is a strategic question.

MF: Is this the right moment to highlight the Douro designation? I ask this due to the current notoriety of Douro wines.
GMP: There is no doubt that the origin is in the Douro and we cannot ignore it. I don’t think the question of who ‘invented’ the wine is as relevant. The place of origin is important.
MF: More than once, I have been told that the region wouldn’t be what it is today if it weren’t for the British... Even local people from the Douro have said this to me.

GMP: Probably not as it is today, and a different region for sure. But who could say it would be better or worse? Winemaking certainly developed in the region under the influence of the [British] market. But was that for the wellbeing of the people that live there and that worked for it? I am not sure about that.

We are talking about a region that has faced several cyclic crisis of profound misery, that is still one of the poorest wine regions in Europe and in the world – and we should be reflecting upon this.

No doubt that the Douro wines generated wealth for centuries, but who benefited from this wealth? – That is a serious problem.

Supposedly, the Douro should be doing very well, because it is not even a highly populated region. If the full profits of the appellation of origin were to be considered, since the Douro is a pioneer demarcated region – a hundred years ahead of Bordeaux, for instance... Well, it had all the necessary conditions to be fully developed.

Recently, I have stated the following at a conference in Vila Real: dependency on viticulture in the Douro is a condition of underdevelopment. And this condition has been aggravated.

MF: Do you mean in the Douro, particularly? Or in any other wine region where dependency on viticulture is observed?

GMP: Well, elsewhere too, but particularly in the Douro. If we look at Jerez in Spain, for example, dependency is not as extreme as in the Douro. The problem is that when a region faces such dependency and has no alternative economical activities, it is at high risk, especially when the producers do not control the distribution channel. In the Douro, this activity is dominated by the commercial sector and today even by great multinational corporations. By imposing prices below production costs, these corporations are ‘killing’ the small producers. Besides, the Douro is an ageing region (in demographic terms). I am almost sure that this problem cannot be compensated by the next generations.

MF: So, considering the issues that you have mentioned, what else would you point as vulnerabilities of the Douro?

GMP: Mainly, this dependency on a single economic activity. Having said that, I strongly champion the investment in agro-industry. But I mean diverse agro-industry: fruit, vegetables, even other products derived from the vine, like raisins. These activities are not complex, from a technological point of view, and enable to generate employment. We cannot rejuvenate a population without jobs. The unemployment rate, which is already high in Portugal, is critically higher in the Douro. If we want to boost the local economy, we have to consider all the possible sectors. The Douro covers 250.000 hectares, in a land economically dependant on viticulture, but viticulture uses only about 40.000 hectares – less than 20% of the whole territory.

There must be a better, more rational use for that territory. It could be silviculture, the cork forest, for example. The Pesqueira district is still producing cork, so why not? And raisins, the Douro raisins. There were times, in the past, when the Douro used to export raisins, and the quality of this product was exceptional.

Another serious matter is the lack of an effective and independent local political structure. The Douro has been hampered by national policies which do not take the particularities of the region into account. We have been discussing for too long whether the Douro should be a touristic region; now the whole northern country is a touristic region. There is a need for ideas, but especially a need for aggregation, for regional integration (through the CCDR-N, for example). I mean true regional policies that are not just a patchwork of short-term ideas.

MF: This leads us to one of my questions regarding the Douro organisations. It is such an intricate net of entities I find it very hard to understand what they do, who governs what.

GMP: I am not surprised. It is intricate. To think that some organisations actually compete with each other! This appears as a shocking fact to me, because it seems there is a certain interest in keeping the region divided. A region cannot create a sustainable development strategy if it doesn’t have a nucleus, a single voice, its own decision-making centre. This is a serious matter.

MF: Is this an historical problem?

GMP: Absolutely, yes. Division is endemic in the Douro, and there were always people (in central power) willing to take advantage of it. But, of course, this does not benefit the region in general.

MF: If there was actually a strategic plan for the region, who would be in charge? I have made up a list of the organisations [I show the list to GMP] and I know most of them have different purposes, but sometimes this is not very clear.

GMP: That is why I speak of true local power. In a democracy, empowerment is not legitimate if it is chosen by election. All these people [pointing at the list] are either nominated or self-appointed. However, some of these entities are associations, and that is all right, that is civil society in action. In terms of authority – in the good sense –, whoever decides, whoever will mobilise a whole region to implement a strategic program for the future, that must be done by the political power, there is no other way. But it must be legitimate political power. I think the only organisation that is prepared to do that now is the CCDR-N. However, the people in there are not elected; the current director was nominated. Every time there is a new government, chances are the people will be different. This broad setting cannot lay the foundations for sustainable development. For instance, a strategic development plan was established recently, but then a new government came and completely changed the course of the plan. There is no region capable of enduring this.

I am addressing this from a global perspective, of course. Some people will argue that the future of the region’s development lies in tourism, a panacea for all the problems of the region. I am not an advocate of tourism, I don’t think it is significant. Besides, if
the tourism headquarters are located in Porto – as it is today – what will be the benefits for the Douro people? I don’t believe any implanted touristic model will be the remedy for the region. Surely, there will be some visibility because the river cruises attract journalists, awareness and publicity for the region, but that is about it; it is not a long term, sustainable solution.

MF: Going back to a previous question, would you say any of the following concepts inform the Douro contemporary identity: religiousness, conservativeness, family, patriotism, education, social background, inland condition?

GMP: I would say almost none of them. The Douro is not a region particularly influenced by religion. Compared to Minho, for instance, it is a much more open and diverse territory, where certain aspects of religiousness do exist, but are more diffused. Some places in the Douro are more or less conservative, but I would not consider that as a local characteristic. I would say the Douro does relate to the idea of the typical inland region, yes. Culture and education may have an impact on the region’s characteristics. The latest INE’s [National Institute of Statistics] reports on education – which analyse basic literacy and school drop-out rates – depict a few Douro councils as the country’s less developed regions. But there is not much we can do about it, because the worst data refers to an older generation, one that will hardly change. We can try to campaign and get all the elderly to read, but I am not sure this type of ‘fixing’ measure would have any significant impact except, of course, in the people’s dignity. Culture is another key aspect, not so much in an individual perspective, but in terms of cultural development. In general, cultural organisations in Douro work backs turned. Cooperativeness in the Douro is quite significant, though. A few years ago, an official report listed more than a hundred cultural associations. But this is not enough for general development. We are talking about a poor region which lacks basic resources and accessibility – you certainly know how hard it is to travel from one point to another in Douro. It takes longer to go from Mesão Frio to the [Spanish] border than to Porto! This is a typical internal difficulty. If most of these cultural organisations had networking skills, that would make a huge difference.

MF: You mean that networking is not happening.

GMP: That’s right. I will give you an example: Vila Real had a very good and very well managed theatre. It is indeed an excellent cultural project, with high attendance rates. Probably due to this success, the Lamego municipality decided to rehabilitate a local theatre (Ribeiro da Conceição), about the same size as the theatre in Vila Real, with its own cultural programme. We are talking about a town that lays 20 minutes away from Vila Real; it is a similar project, but in terms of the cultural agenda, there is absolutely no connection between the two. These two theatres are competitors! We know how much it costs to establish a good cultural programme; I mean to achieve social or sociocultural efficiency within these programmes. It is not enough to put up a good theatre piece, you have to speak to and to maintain an audience. And then last year, to my astonishment, the mayor of Régua decided to build a new big theatre in this town. This means that in an axis of three towns that lay about 15 to 20 minutes away from each other, we now have three big independent theatre structures (we have to realise Régua has about 10.000 -12.000 inhabitants, less than the smallest parish in Porto). This is totally missing the right proportion.

MF: Are you saying these things happen because people are working hacks turned?

GMP: Indeed, but that is not all! A small theatre building, for about 200 seats, had just been rehabilitated in Régua. Surely the mayor must have thought that 200 seats were not enough. But that is not the point. If you have to fit 10.000 people for a specific event, then you can create a provisional structure.

MF: Or you might connect with your neighbours and share the resources.

GMP: Exactly, why wouldn’t you go to a place that lays just 10 minutes away? This is a complete failure of rationality in terms of logical investment.

MF: Is there an entity capable of preventing this from happening?

GMP: I do not think so. All of this is being paid with EU funds. This is money that will not be invested into something else, for example into building a fruit juice factory in the Douro – I reckon, a more profitable project.

MF: Back to the question: who will benefit from it in the end?

GMP: That is the point, this is clearly a lack the right policies for the people. We have to reflect on the outcomes of such investments. By saying this, I don’t mean people shouldn’t have access to culture and education, and public authorities have the obligation of caring for that. But this is something else, it is a duplication of structures without real social profit. When you build a new theatre, it is supposed to have a successful and profitable attendance flow. This successful outcome happened in Vila Real because the project was conducted skilfully, the theatre had a very competent director – Vítor Nogueira. He is quite exceptional. But multiplying structures, to my discernment, is not a good idea. Then we need to evaluate something else: most of the Douro people can’t access culture, anyway. If you think of old people living in the inner territory, they have no means to come to any of these theatres, that is for sure. The theatres ought to reach out for them, just like medical services reach out for the people in need. Berta Nunes, for example, the mayor of Alfardega da Fé, established a medical ambulatory service for the population of her municipality. It is a small unit in a van with the basic medical support, a doctor and a nurse, that is very efficient. I reckon that similar ideas can be adapted in many other contexts: theatres, libraries, schools...
I believe it is possible to organise the local economy accordingly. So many people in little villages of the Douro are old, they are still working, they take care of their little vineyard, but they are completely on their own! We need to create the appropriate networks to help these people. It is truly a mission.

MF: One of my crucial question relates to the evaluation of the success of Douro’s dry wines.
GMP: Yes, that is an important question. It is debatable whether Douro wines are successful. You have to ask: successful for whom? Barca Velha is successful, Vale Meão is successful, Dirk Niepoort’s wines are successful. But you are talking about individual initiatives of single companies, not about the whole region.

MF: Yes, that is also my perception, so I asked myself what might be a positive contribution.
GMP: Well, again, strategic thinking is important.

MF: I am also thinking of the recurrent images used by the stakeholders to promote the Douro wines, images that speak to folklore and historicism. How appropriate do you think they are?
GMP: Well, look at the successful cases we were talking about. Dirk Niepoort’s wines, for example. Some of his wine labels are totally outside of the box, but they are very efficient! Then you have the classic labels of Vale Meão, and so many others, there is a lot of diversity. In this case I think it is a matter of individual character. I mean, I can’t think of Francisco Olazabal making wine labels like Dirk Niepoort, it is a matter of personality. That being said, you don’t have to build up on folklore or historicism to create a strong identity.

Of course, there is the other side of the coin, the huge number of producers and cooperatives which project a terrible visual communication. I would say they might represent about 70% of the total local production. What may be the impact of these bad strategies on the broad craft, we have to ask ourselves.

I don’t think people reflect much on the impact of wine labels, as long as they think they are beautiful. It is also a matter of culture. It is important to reflect on models for the communication.

MF: Maybe the diversity of communication you mention reflects that lack of reflection.
GMP: Maybe. I think there is a structural problem in the Douro regarding the products’ communication. People are convinced that they have a good product, which is probably true in most cases, but then their visual presentation is rather poor. This is not happening just in the wine sector, it is the same with almonds, cherries, etc. There is definitely a need to improve the visual presentation of the Douro products.

MF: This reminds me of the Porter report, because it also makes a point on the poor image of Portuguese wines. What can you say about the impact of this document?
GMP: Well, at the time, the analysis was correct and pointed towards some important issues and fragilities of the Portuguese industry. But the Porter report also had a down side, which was the idea that Portugal was an even country, viticulturally speaking. I have read the document long ago, but I remember this was a completely faulty observation; the report suggested that the winemaking regions ought to be subsumed into just a few basic brands, and if my memory serves me well, Porter was also an advocate of the single varietal wines.

MF: Correct. That was his strategy for Portuguese wines in general.
GMP: Fortunately, someone must have told him that Portuguese wines were characterised by multiple varieties, and that the richness of our viticultural genetic patrimony lays precisely on that diversity.

For example, the Douro has an enormous range of native grapes, and the blends are part of the identity of the region’s wines. How was that supposed to work for the Douro, that would be the end of port wine, for sure!

Personally, I don’t give a lot of credit to both reports, the initial one and the one issued by the Monitor Group in 2004.

MF: But did the reports have a significant impact on the wine craft?
GMP: I suppose there were concrete consequences, yes, and the reports were influential. For example, ViniPortugal is pretty much aligned with the ideas transmitted by the Porter reports. But considering the amount of money that was spent on commissioning the reports, I believe the impacts were not significant. And the recommendations, in most cases, are not appropriate for our wine regions. ViniPortugal and ADVID try to follow some aspects or fragments of the recommendations.

What strikes me is that there was never an in-depth analysis and validation of the propositions suggested by the reports. Therefore, it was not fully implemented.

MF: A different question, more concerned with innovation; historically the DDR was a pioneer region in many aspects. Is that innovative spirit still characteristic?
GMP: The Douro, due to its inherent difficult conditions, needs to be constantly innovating. The harsh conditions of the territory are a permanent challenge for the Douro stakeholders towards innovation.

I was fortunate to have met a great Douro pioneer, the agronomist José de Freitas Sampaio. In the 1950s he was an opponent to the dictatorship regime. Therefore, he was often forced to flee to Switzerland, where he was offered shelter by some friends. In Switzerland, Sampaio learned about different ways of practising vine planting. Back in the Douro, he found out these practices – namely vertical planting – could be highly effective in particular sloped plots. With further collaboration, he also managed to implement some level of mechanisation in the production. Today these types of mechanisation are widespread.
Also, the Douro has completely changed within the period of fifteen years. Plots were entirely replanted and reorganised, especially in terms of the distribution of areas for the different grape varieties. All this innovation was motivated by the difficult characteristics of the region.

I believe some errors may have been committed. The extensive vine planting of the 80s under the PRITDM program, for example, fostered a specific wine model that, to my understanding, was not very beneficial. The region is too complex to implement subsuming measures, namely in terms of the use of grape varieties.

**MF: What are the greatest problems within the region?**

**GMP: For me, one of the greatest problems in the Douro is the ageing population. If we don’t do anything about this, it will be dramatic over the next decades.

Another problem concerns low productivity, and consequently, low profitability. Especially, of course, for small producers. There is a new generation of professionals in the Douro, but there are serious employment issues in the region. For example, the new oenologists graduating from the UTAD (the Douro University), they cannot find a job in the region.**

**MF: That is a paradox.**

**GMP: Yes, it is a paradox. Maybe you will observe the same phenomenon in design. You might not even find ten designers working in the Douro! Or architects, for that matter. The Douro lacks good professionals in many sectors: rehabilitation, urban and rural planning, traditional building, stonemasonry, etc. Especially, old crafts that have been lost. There are also some exceptional cases. And we should learn from them. These are the cases that opted for specialisation. Palaçoulo, for example, a little village with only two factories specialised in cooperage and cutlery. They are both highly successful, and the people in Palaçoulo have been the greatest beneficiaries of these initiatives.**

**MF: So, in your opinion, the Douro should not be focusing so much in winemaking, as it is now.**

**GMP: Yes. Diversity is key, and the territory is very rich. Regarding dependability, I believe the situation is getting worse. Certainly the ‘Douro revolution’ has been a very important development, but there are also emerging problems. Especially issues related with labour and ageing.**

**MF: The rivalry between the north and the south, is it still prejudicial towards the Douro?**

**GMP: I suppose it is, but mostly due to recurrent institutional inertia. Of course, I think that Portuguese wines in general must be promoted, but if special wines have a special identity, then they must be valued. A balanced promotion should happen in two different levels, not one taking over the other, which, unfortunately often happens with a prejudice towards the Douro.

For a region with so many small producers, this is crucial. The official institutions, such as the IVDP, must exhort a protective action in favour of these producers. Small producers can have a huge impact in the general image of the region.**

**MF: To conclude our conversation, what can you say about the impact of the UNESCO classification?**

**GMP: Thirteen years have passed, and certainly the Douro became more visible because of the UNESCO nomination. But then, again, there is the other side of the coin. I am not sure the Douro people benefitted greatly from this nomination. Sometimes simple aspects of practical life get more difficult due to the restrictions imposed by institutions such as the UNESCO, and this can have tragic consequences.

For instance, I believe Quinta da Pacheca has fallen into bankruptcy due to the bureaucracies imposed by UNESCO regulations. Great investments were made for a rural tourism project, but then two years passed before they were allowed to implement the project. And that was the end of it, the owners had to sell the property and lost everything. I can tell you this happens a lot in the Douro.

The Douro is definitely a region with many paradoxes, and many imbalances.**
Miguel Salazar
Art Director, Quinta de Tourais

This conversation started with the topic of Douro’s contrasts, i.e. the more traditional and the more contemporary settings. I briefly described the other case studies to Miguel Salazar. The contrasts between Quinta dos Murças and Quinta de Tourais, for example, were mentioned to explain that the aim of the study was to explore the wine region’s diversity.

MS: A while ago you mentioned the idea of reinterpreting the tradition and I was thinking that what happened at Quinta the Tourais was precisely that. I was introduced to Fernando by some common friends that were working with him. So, this was a friendship that developed out of a professional collaboration.

MF: And from what Fernando told me it didn’t start with the wines.
MS: That’s right, it started with the jams. The logo, the orchard, and the estate’s identity, it all started there. The iconography is a mixture of elements: a glass, a tree, an orchard, and also a connection with the icon of a German experimental band, Einstürzende Neubauten, which was a type of industrial music Fernando and his friends enjoyed.

The initial work was rather conventional: paper labels for the jams and for the first wines… But I remember it was not easy at the beginning, I mean, to launch a business in wine from scratch. So, I told Fernando maybe a different approach might work well, and you can tell now that all the wines from Tourais are very consistent, in terms of their image, which was not happening from the outset. Eventually, the paper label’s approach was abandoned.

MF: And that is what is so unusual about this project, the silkscreening. We observe that more often in the port sector. We observe that more often in the port sector. MS: Yes, silkscreening was the traditional way of distinguishing glasses, olive oil bottles, and, of course, port wine. In the old times, producers used very artisanal stencil techniques to mark the bottles. So, the idea started right there, as an attempt to recover the technology of marking bottles. Thereupon, we tried to explore images that would appeal to the consumers. The first image of Tourónio, for example, is an attempt of doing that.

MF: You mean this one [image of bull with a hand’s face]?
MS: Yes, correct, that one.

MF: So, it started with the ‘touro’ [bull] iconography?
MS: Well, yes, ‘touro’… ‘Tourais’ is a root, I think.

MF: Really? I have looked up the term and found a number of different meanings, and then while conversing with Fernando additional connections were made… With ‘touradas’ [bullfights], for example, is there a link?
MS: No, not with ‘touradas’, I don’t think so. But I admit there could be a number of different connections, and that is ok. The Tourónio figure, as you can see, has the body of a bull and then the ‘head’ is a hand.

MF: It is, indeed, a rather enigmatic figure; was that on purpose?
MS: Well, we just wanted a change of paradigm, really. If you look at the old typographical paper labels, then you can tell the difference.

MF: You mean you had designed the ‘old’ paper labels already.
MS: Well, not entirely, I had done that as a partnership with a friend, the one who introduced me to Fernando.

MF: Do you still have images of those original paper labels?
MS: Yes, I think so.

MF: And it was your suggestion that they ought to change.
MS: Yes. Well, Fernando kept trying to use these paper labels. But paper, you know, is easily damaged with time, either by storing the bottles in humid places, or by refrigeration, and so on. So, a print on the bottle forever and ever… Well, I have met people who use the empty bottles as jars, or that simply keep the bottles because they are beautiful. By that time, it was quite out of the ordinary. The idea occurred to me when I visited a silkscreen printshop. They worked with port wine brands and made promotional glassware for companies like Coca-Cola and Superbock. Obviously, the process has technical limitations. The cut line on the template, for example. This detail prevents you from doing a perfect 360° print, but then you learn to make the most out of it, and there is still a lot of surface you can use, which is totally unlike using paper.

MF: Yes, for example this label here (Rayna di Nord’s design), in which the design was so ingenious you can’t tell where the cut line occurs. It looks continuous, but it is not.
MS: Yes, that’s right. If you see the print file, it is more obvious. I think I can recover it for you.

MF: Thank you. That would be interesting material to evidence details of the process. The constraints, the design process, as well as creative or inventive solutions.
MS: Of course. Yes, I think I can get it for you.
Ms: Yes, something like that. Quite informal, though. I

Ms: This one, for example, this one has a connection with Lamborghini (the car logo). It is kind of a joke.

Ms: This other one, for example, this one has a connection with Tourais (the producer). It's part of that story of the skull, but you know about that.

Ms: I see, that's nice.

Ms: This other one, for example, this one has a connection with Lamborghini (the car logo). It is kind of a joke.

Ms: If you ask me whether there is a line of continuity or a very defined strategy, I will tell you there is not. On the contrary, it has always been a very unrestrained project. Basically, it is a group of friends. Ideas and proposals emerge, they are discussed, and then they are approved within the group.

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Ms: Exactly. But what you are mentioning is the usual design work, and there is nothing wrong about it.
MF: Yes, I have learned about it. Fernando also told me you were ‘appointed’ as the creative director within the group.
MS: Well, there are other designers and intervenientes within the group, but, yes. You could say that I assumed that role, given that I had known Fernando for a long time. Here is one label illustrated by Mariana, and another designed by Luis Úrculo.

MF: When you ask for a collaboration, then, are there any constraints?
MS: Just the technological constraints, I suppose.

MF: Is there a concern with the place of origin? Would you say these wines, with their visual identity, might have been made elsewhere? For example, in Alentejo. And is that relevant for the design process?
MS: I suppose so, maybe. I admit these wines could have been made in Alentejo, for example. But take this. Here is a wine producer, and he is relatively isolated in the Douro, especially during the cold season. He comes to Porto and meets his friends from school. There is one designer, another designer, a communications’ technician who organises musical events, a former textile designer who is now a master brewer, an architect… It is such a mix! The project is an attempt of bringing together completely different languages.

Yes, you could say wine labels, in general, have canons, but here we were not following any rules. Take, for example, that crazy story of the brand name registration which led to Furia wines; Fernando forgot to update the registration, someone registered a very similar name in Alentejo, and then he was prevented from using the brand name…

MF: Did that really happen?
MS: Yes, it did, so Furia is the ‘old’ Quinta de Tourais. I believe you are missing some images here [the paper labels].

MF: I suppose some parts of the puzzle are indeed missing, but this is what I have been able to collect so far.
MS: I will try to get some of that material for you. As I told you before, the whole thing is not very organised, for example, I am not really involved in the design processes of the Miura range [Salazar searches through his image archive].

MF: So, the bull image, the bull icon is more recent.
MS: Yes, and in the meantime, the bull (image) has conquered the markets. But that is the change of paradigm I was telling you about. I advised Fernando he should change the relationship with the consumers by using a more iconic identity, i.e. an image that enabled to create empathetic bonds. And the bull, as some kind of mythological figure, had that differentiating potential.

You have to picture a wine shop in San Francisco or in Seattle to understand that. I mean, when the whole thing started, we couldn’t even imagine that type of scenario, the hipster wine bar, etc. But that was already happening in the wine world, so it didn’t take long before these wines found their place within the international market.

MF: Fernando said the wines were popular in Scandinavia, and amongst consumers with a more evolved visual culture.
MS: We have different wine cultures. In Portugal, it is still very common to go out for dinner and ask for vinho da casa, the ‘house wine’, which is usually unlabelled. I have to confess I never thought in terms of ‘other cultures’. I thought of an image that might work well for this project and of using the same technology of port wine: the stencil and the silkscreening.

MF: For niche wines, or for limited editions, I understand silkscreening is also cost-effective, compared to paper labels.
MS: Yes, that is true, even printing in two colours is quite affordable. The only thing we have to count on is production time. The printing has to be finished earlier and on time for the bottling.

MF: What about this one? And that one?
MS: This one was made by Pedro Tudela, and that one was made by Arménio Martins. He used to be a textile designer, but today he is a brewer. He was actually the person who contacted me to join the project because they needed someone more familiar with typographical work and with the technical processes.

MF: This one looks rather exotic and strange, but it reminds me of those characters, the caretos.
MS: Well, Arménio is from Soutelo Mourisco, in Macedo de Cavaleiros, where they have kept the caretos tradition. I believe you might say that the figure is connected with the caretos, yes.

MF: Given your experience in this area with different products, what would you say is ideal in such collaborations?
MS: I am concerned about the role of design. This may sound utopian, but I believe designers should interfere less. We should move back to the beginnings. There is too much apparatus and that may threaten the products’ authenticity and longevity.

MF: What do you mean? Is this not an authentic project?
MS: Yes, it is, indeed. But it is the professional act of ‘designing labels’ that is not as clear to me. By saying this, I just want to point out that maybe designers are not quite aware of the importance of ageing wines. We have to reflect on the generations that will drink these wines in the future.

Surely, designers need to be aware of the culture of the consumers, as well as ongoing ‘trends’, but they also need to think in terms of heritage. The Douro wines that age well are walking that path, and designers are also a part of that process, now. They must be aware that the work that they produce today will inform our future visual heritage.
We defined a quality criterion.

CA: No. We made those six different labels initially afterwards, and I think because of that the graphic quality of the full range is sometimes inconsistent. I reckon some are nice, but they were not my choice.

MF: From what I have understood the initial brief was meant for the German market only, right?

CA: Yes, that is correct. At the time I had a professorship in Germany and I used to make weekly projects with the students. In one of these assignments, I asked them to make a label design for a German wine, and the following week I asked them to make a label design for a Portuguese wine. I wanted to explore the different strategies they might come up with, depending on the market country. This is how it started.

MF: Right. How does Niepoort enter this scenario?

CA: Well, at the time I was working with Niepoort, and we were designing all the labels for their table wines. So, I asked both the University and the students if they were willing to work on a ‘real world’ project, from which they would ‘get paid’ in wine boxes, and they all agreed. Dirk Niepoort agreed, too, so he handed me a brief of a wine called ‘O Mouro’. As I understood it, the actual word relates to Arabian people, or some sort of arabic influence. However, I told the students that they were free to make more abstract interpretations, in a way, or to explore concepts such as dark things, brown things, whatever. One of the students, Anne Klenk, used a cartoon of the famous 19th century German author/illustrator Wilhelm Busch.

MF: Aha. I see.

CA: It is a funny story of a bird who gets so greedy for port wine, he can’t stop drinking and then by mistake he hangs himself. What is important to know here, given the context, is that in German speaking countries, like Austria, Germany and Switzerland, everybody knows the stories of Wilhelm Bush. It is part of our childhood memories, we love him. His writing is very funny.

MF: Was there any constraint for the students regarding the design?

CA: I had told the students that they could use the Niepoort visual identity. Not that they had to, but they could use the elements that Alessandri Design had created, which were the illustrations with the perforations. Anne Klenk was the only one who used it, and she used it as a grid.

MF: So you had a number of different proposals and this one [Anne Klenk’s] stood out somehow?

CA: Yes, that’s right. Maybe I can still track the students’ works. Anne’s proposal was pretty much handcrafted, not exactly professionally executed, of course, so we had to work on it afterwards. But the core idea was there. Then, when Dirk saw her work he said, ‘Ah, I’ve always wanted to make a wine for the German market!’ But let us remember this was the brief I had given the students for the Portuguese wine, so in a way the concept was totally wrong. In Portugal, of course, nobody knows who Wilhelm Busch is, so it wouldn’t work well. Anyway, from there on, Anne got her wine carton, and Dirk commissioned us (at Alessandri Studio) to work on the idea and make it more professional. Eventually Anne became an intern at my studio, and I have always insisted that her name should stand on the label.

MF: According to Dirk’s description, Fabelhaft was a concept which emerged at your studio when you were developing Anne Klenk’s idea.

CA: Yes, exactly. And it became a very successful wine for the German market. I believe 60,000 bottles were made in the first year. Everybody wanted the wine, the gastronomy, the vinotheques. We thought about what had made it so successful. Maybe because it was in a way, er… A chauvinistic concept, and that generated a connection with the German consumers. So, after two years, Dirk insisted on making a wine for the Spanish market, but since the illustrations he suggested weren’t very good, I asked my beloved Gert Winkler, who was a famous creative director in Austria (sadly he passed away recently) to write a concept for Dirk. Something like a criterion to be used in these wine labels. I still have that document, and I can send it to you.

MF: That would be great.

CA: The concept was something like this: in the future, we wanted to ask the most famous cartoonists in a country to make a story in twelve pictures; it should be a funny story, it should have to do with the (Douro) wine, to establish a connection with the market country. The purpose was to meet this chauvinistic concept we came up with, but still make the wine stand out. Our idea really was to work with famous illustrators and cartoonists, and have the highest quality illustrations.

MF: That is interesting, I didn’t know that a concept had been set out so clearly.

CA: Well, it took two years until Dirk was convinced, or maybe until he was ready to continue this idea. There was his family, and the company, you know, he had a hard time convincing them this was a good project. During that lapse, I had the chance to contact people, and so on. For example, Gestolen Fiets which means ‘the stolen bicycles’, in Dutch, was the one we art directed for the Netherlands, then we also made one for Portugal, Brazil, Finland and the UK… Altogether, we made six different labels. I will send those templates to you. The purpose was always to use one label for one country. Unfortunately, I didn’t coordinate all the wine labels that were made afterwards, and I think because of that the graphic quality of the full range is sometimes inconsistent. I reckon some are nice, but they were not my choice.

MF: I understand you are not conducting the project today. I mean, the design project.

CA: No. We made those six different labels initially and a few more. We defined a quality criterion, and then it went on, and on.
MF: Is that why some labels have your signature?
CA: Ja, exactly. I have to say we were really enjoying working with Niepoort and almost stopped everything else at the studio to work on their wines, including the other table wines and the ports, which I think are still very beautiful. But we felt of utmost importance to have a quality criterion.

MF: And was the wine’s provenance relevant to you?
CA: Yes. Fabelhaft, despite its name, was always meant to be a Portuguese wine, a Douro wine. And I think it is very important that it remains like this. One thing that is very, very important to me is the underlying concept elaborated by Gert Winkler. In the end, this turned out to be an excellent marketing idea. So, I insist that his name should be mentioned and that he is credited for the most important point of that marketing idea, which was to make one label for each market.

MF: So, from what you are telling me, then this whole idea emerged from the design process. As you took this project to your students, discussed it with Dirk, directed the artwork and then worked with Gert Winkler to come up with the underlying concept and continuing labels…
CA: Yes, I would dare to say it is one of the most successful cases of wine packaging in the last twenty years!

MF: Are you saying that the initial wine project called ‘O Mouro’ was dropped, and Fabelhaft was born out of that?
CA: Yes, and I will definitely try to find Anne Klenk’s original design, because of course in her proposal you can still read the wine’s name as ‘O Mouro’.

MF: That would be super, because it is so difficult to recover original sketches of projects that were made long ago… If you have a record of it, then it would be great!
CA: OK, I will be away for some time. Please send me an email when I am back in the studio, if not, I won’t be able to find it. And then remind me of Anne Klenk’s design and Gert Winkler’s concept and I will try to find it for you.

MF: OK, I will do that. Thank you so much.
CA: Ja, another aspect I would like to explain, when I showed the students’ work to Dirk is that… You know that Dirk has German roots, because his mother is German.

MF: Yes, I know that.
CA: Right, so that is why, obviously, he liked the Wilhelm Bush story, because he is familiar with it. But then we began to think about the brand name [of the wine]. He said the label was nice, and he liked it, but it didn’t suit the concept of ‘O Mouro’. Then, as we kept discussing, I mentioned ‘Fabelhaft’ has a double meaning in German: it means ‘fabulous’, which is like ‘excellent’, and fabel is… er… er…

MF: A story? A fable?
CA: Ja, ja, exactly. It is a story too. So, in German it sounds really nice.

MF: So, was the label design with Wilhelm Bush’s illustrations influential into changing the wine’s brand name?
CA: Yes, well, for the German market it made no sense to call it ‘O Mouro’, because no one would understand. I believe the wine itself was some project that Niepoort had with a winery, so I am not sure he made something else with ‘O Mouro’. Anyway, Dirk said it didn’t make sense to label ‘O Mouro’ with those illustrations, but he enjoyed the idea so much he wanted to use it.

MF: Another question, you refer to the Fabelhaft labels as the ‘comics’ labels, is that correct?
CA: Yes, that’s right. I mean, that is my version. I think it is more correct, because Fabelhaft is just the wine for the German market. And each of the wines within the ‘comic edition’ has a different name. So, I say the ‘comic edition’.

MF: Niepoort [the company] refers to it as the ‘storyboard edition’, and I noticed that some of the illustrators are actually from the world of animation, animated movies.
CA: Well, that is probably how Dirk and Verena interpret the project. I don’t really care if they are animators or illustrators or comic authors, as long as their work is good.

MF: Were you making other labels for Douro wines before, after or during this particular project?
CA: Well, the first Fabelhaft was made in 2004, and we started working for Niepoort in 1998. I guess during those six years we made most of their other Douro table wines. We also designed the label for Duda/Dado (half Douro, half Dão), that one with the ‘dadaist’ wine label.

MF: I see. And you created the ‘template’ label for Niepoort’s ‘Projectos’.
CA: Yes, that was a very interesting concept. Dirk has so many ideas, you know, he is a visionary. Sometimes he makes experiments that are not worth printing thousands of labels. So, the point for this one label was to make a ‘template’ design where either the printer could literally add anything (even if it was not nicely done), or then add the information by hand. We also made another label for a Douro wine, and that one is not even on our website. The ‘Poeira’ wine. Poeira means dust, right?

MF: Yes, that’s right. I remember Poeira and the label design, but I didn’t know they had been designed by you.
CA: Yes, so ‘Poeira’… Er… Well, this is so typically Dirk. He asked us to make a wine label – the cheapest possible – for a friend of his who made wine but didn’t even own a winery… So, we made it and apparently, he loved the concept: the idea was to use the tube of a vacuum cleaner and to bent it like a twisted vine.

MF: I remember those labels, but I didn’t know they had been designed by you.
CA: Yes, so we came up with, like, twenty different shapes from the tube of the vacuum cleaner, and because it was brown, it kind of looked like the stems of the vines… I think in the end it worked really well, because they used it then, and are still using it now.
MF: So you appreciate the importance of feedback and communication with the client.
CA: Ja, ja. Certainly. And normally we set out very clearly (in written form) how the design should be used; for example, whether it can be used in one country, in Europe or in the world. The companies are not allowed to change the design.

MF: Do you think it is important to supervise the whole work until it is completely produced? Even the less visible parts, such as the back label, the printshop’s work, etc.
CA: I like to supervise the work and I do not always attend, especially if the print work is done in another country. The printer can update the vintage year, but they should respect the original typographical design. After we have made a wine label, I usually suggest that they come back to us in one to two years-time so that we can evaluate the work, make adjustments, or redesign, if necessary.

MF: Would you send me the original files as well, I only have the printed labels.
CA: Yes, sure, I will do that when I come back, just please remind me.

MF: I will, thank you for your time.

The Fabelhaft concept (as sent by Alessandri)
What we have.
Fabulous is a success.
The wine is not exhausting.
The label original and German.
Wilhelm Busch is the best German cartoonist.
At least one of the best known.

What we want.
To repeat the success of the Fabulous.
In other countries.
We assume that we do not have to adjust the wine.
He is a port in the UK and China.
That's the exception.

But what is the rule?

The label tells a story typical of the country.
The story tells the best cartoonist in the country.
At least one of the best known.
Of the country or in the country.

The process.
We research the cartoonists.
We discuss the stories.
We give the order.
We start a series that is impressive.
And drink.

e.g.
Alan Moore Vendetta
The New Yorker
Albert Uderzo Miraculix
Joann Sfar The Rabbi's cat
Frank Miller Sin City
Vintage 007: James Bonsch
Phone conversation starts review of previous email exchanges and situating the topic of the design process, following an encounter with Maria Emília Campos, Churchill’s CEO.

MF: So, the brief you were given implied the refreshment of an existing brand image, is that correct?
DNM: Yes, it is. There was a brand, a name and a history, mostly associated with port. I suppose Interbrand was assigned because Churchill’s was entering a new stage with the dry wines. They needed to reinforce their position and their communication within the premium market. They also wanted to work with an agency familiar with the UK market.

MF: Could you please tell me about the choice of image for these wine labels?
DNM: Using the images of the actual locations was very important. Considering what the Douro is, I mean. The landscape is unlike anywhere else; the Douro valley is so iconic, we really wanted to capture that. We also wanted to create a very premium feel; to accomplish that, black and white seemed to be the colour, and allowed us to portray a very stylish brand image. To create something beautiful, that was almost a ‘Chanel’ of wines. Hence why we just used black and white and we kept the typography very elegant and minimal.

MF: Those images aren’t just plain black and white photographs, and the (aerial) perspective is quite unusual too, what can you say about it?
DNM: Well, I would say we didn’t just use photographs, we tried to make illustrations of it. So, we actually traced over the photographs, and by doing this we were trying to make them more ownable. Anyone can take a photo of the Douro valley, but to recreate it in a more stylish, iconic way, in this case, belonged just really to Churchill’s.

MF: Were you given any constraints (from Churchill’s) in regard with the design?
DNM: Because we weren’t starting from scratch, we were concerned to make it ownable (to Churchill’s). We felt that even if we gave it a twist, it had to be done in a certain style. We did try to work on the photographs in a more contemporary way, though. But there weren’t any constraints at all, and in that sense, it was the perfect brief because we were allowed to create a label with very few limitations.

MF: Maria Emília mentioned it was a happy encounter that worked really well, would you share her opinion on this particular project?
DNM: Yes, yes, definitely. We were very much interested in working for premium brands and Churchill’s was a very interesting client.

MF: Considering it was a redesign, how did that impact your work?
DNM: There were no constraints at all, the fact that there was a previous image didn’t have any influence in our design project.

MF: Since your work included the port wine range too, did that influence the design of the dry wines’ labels?
DNM: In that respect we just wanted them to look like a family, more than anything. We wanted to create a style that would work with the packaging as well, so that they might use it on other situations. But we wanted to ensure that there was a family-looking feel that included both wine styles. This was made a long time ago, so I don’t exactly remember everything.

MF: I understand that. It was made in 2008. And I am trying to recover aspects of the design process, so anything you might remember would be very useful.
DNM: One thing I remember is that they wanted to create something that was timeless. Something that in ten years-time (from then) would still feel stylish, contemporary and timeless. I think the fact that they are still using those labels today means that we hit the brief. I believe that even today people use this example as an inspiration, we keep seeing it across Pinterest and social media.

MF: That is right. Have you seen the actual labels recently?
DNM: No, I haven’t.

MF: The designs have been expanded onto the decoration of a Visitors Centre.
DNM: I haven’t seen it, I would love to.

MF: I believe you are very experienced in packaging design for niche and luxury markets. How important are the less visible parts of the brief, such as the back label? Can you tell me about it.
DNM: Definitely. The backlabel’s design is very important as well; obviously not as important as the front, where you have to communicate more, and jump off the shelf more. But for us it is very important to make a good work for the back label as well; it must show that it has been done by the same hand. So, we make sure we use the same typefaces, and absolutely everything is considered. A lot of detail into the typography, the line breaks of the types, the sizes... And if we can add the logo or an image in some way, we try to do that too, although the back label... The size of it is usually quite small so it is generally much more limited in terms of the space available.

MF: In the Douro they have very strict regulations regarding the design of wine labels, I am sure you are aware of that.
DNM: Yes, of course. Sometimes it is a struggle. That’s normally where most constraints are. You have the ‘mandatorie’, we call them, such as the barcode and a lot of symbols that you have to integrate referring to recycling and pregnancy... So, all of this has to be considered, and all of these elements have legal sizes that they have to be. That’s where you can have a bit of a juggle. Sometimes it is quite a challenge to make them look beautiful, but we try.
MF: The design work is quite demanding, we should highlight the importance of that work being done professionally.
DNM: Yes, definitely.

MF: Would it be possible to recover the original files you made at Interbrand for that work? I am trying to gather as much technical data as possible.
DNM: That would be difficult, we wouldn’t have it now. We don’t keep that information for so long. Emília might have it, I would ask her, she might have it but I am assuming probably not. You might get it from the printer, though.

MF: So, the labels were printed in Portugal.
DNM: Yes, I believe so. I am not sure, but I think so.

MF: Were you attending the printing process?
DNM: Not in this case, no. Sometimes I do attend, when it is complicated. But when it is very straightforward artwork, I don’t attend the print work.

MF: What is your experience of working within the wine world – and in Old World regions specifically? What would you say about the engagement of designers? What could be the added-value brought in by design?
DNM: The job we do… I think we are very, very lucky. I have been to some amazing places because of this career. To have gone to Churchill’s, for instance – not only being given the brief, but actually getting to know the place… I think it only works well (in wines) when you actually experience it. So, I guess when they invited me to come to Churchill’s, I was lucky enough to come to the Douro, pluck the grapes, learn all about the process, and really understand the production, and the passion that goes into their wines… That’s when you start falling in love with the brand, and you want to do an amazing job.

With some of the other brands we have worked for, for example Courvoisier, in France… Again, the team and myself, we have been to the Cognac region, we learned about the process, we have seen it from, literally, from them picking the grapes, to the coopers making the barrels, charing inside the barrels, literally every single step of that process, we have taken along that journey. I think that to create a great design you have to do it, because you have to really understand the story they want you to tell.

I think we can only create something if we collaborate with the wine producers, or the wine brands; and in order to do that, we have to understand the process. But we can only do something great once they share with us what is important and how it is produced; but also, we can only do a great piece design if they give us a great brief as well. Furthermore, there is even more responsibility that we have to take on now as well, regarding not only what is right for the brand, but what is right for the environment or the craft. I think that is very, very important.

MF: What would you say about the link with place of origin, or about a sense of authenticity?
DNM: I will say that every brief is different. For Churchill’s, I think that link with place is very important. Like other brands, they want to talk about provenance, and if you come to the Douro you will understand that. That is a great story to tell. But another brand might want to talk about the process, and then the process becomes more relevant. For example, if the grapes are hand-picked, or if the product is handcrafted… Again, it depends on their particular story. Sometimes, we help them with that (the story), and then the knowledge, the close contact with the producer, it becomes even more important.

MF: What do you think is specific about the Douro.
DNM: It is an amazing place, and I think you couldn’t really understand this if you hadn’t been there. So, as a designer you have to go there and experience it. When I came to Churchill’s, the story they wanted to tell was about the Douro valley, and of course I thought it was the right story to tell!!

MF: Regarding complementary elements such as the corks, the capsule, other packaging elements, what is your approach to that within the brief?
DNM: Again, I can’t remember all that we have done at Churchill’s. Normally that will depend on the needs of the client; corks or stoppers, we might even redesign the structure of the bottle, the tissue that it gets wrapped in, the box that it is carried in, whether it is the inside or he outside… Yes, everything the consumers will hold in their hands, the sense they get from seeing or from touching these elements… It is all very important to us.

MF: Can you tell me about the redesign process, regarding the elements that you decided to keep? The logo, the crown, the typography…
DNM: Yes, that was all recrafted. In that case, it was important to keep it true to how it was. So yes, it was all redrawn, sort of.

MF: Why wasn’t everything made from scratch?
DNM: Well, the main label wasn’t completely redesigned. I mean, there were lots of cues to keep. There were many things that we wanted to retain, and we thought it was important to do it to create some coherence. This brand had an interesting history and so we wanted to build on that capital. We certainly made some refinements, but you should be able to tell it was the same brand. Often it is important to respect that.

MF: Very well, Daniela. Thank you for taking the time to speak to me.
DNM: It’s a pleasure. Did it help?

MF: Absolutely, thank you so much. It is very important to have your personal account, especially regarding the design process. There is no way I could trace back those details without your feedback. I need to ask for your permission to use the information you have just provided.
DNM: Of course, you can use it. As long as it helps, of course you can.
A long weekend stay was organised by Eduardo Aires with Esporão so that the design team could come to Quinta dos Murças and become acknowledged with the place. José Luís Moreira da Silva, the oenologist who is currently supervising local winemaking, guided most of the walks around the estate, and provided key information regarding the winemaking project. Previous research about the estate and winemaking, as well as the design project, had already been conducted. I asked to join the group on this trip for a preliminary data collection which was complemented with visual material provided by the design studio. Subsequently, I arranged a conversation with Aires to obtain specific knowledge on the design process.

MF: What is so special about working with wine?
EA: First and foremost, working with wine is difficult because it is very specific. I love wine, and I have waited 40 years to work with wine. I am glad I did, because it takes a lot of maturity, patience and expertise to work within this field. I believe you have to be passionate about wine to do a good job. In that sense, I feel very fortunate for having had the opportunity to work with Esporão.

MF: So when did you start working with Esporão?
EA: I have been working for Esporão since 1998. Everything that relates to their brand image and the image of their products, such as wines and olive oil, is designed at our studio. The relationship that we have built over the years is fundamental. It is true that we have a relationship of mutual trust, and I can confidently say that Esporão trusts me and credits the quality of my work, but that is because I have been able to transfer that quality into their products. As designers, that is our main job. We are not here to show off, we are here to offer the best of our abilities to our clients. That is what I have tried to do with Esporão since we started this collaboration. And it has been most rewarding.

MF: Specifically, what kind of work have you developed for Esporão?
EA: Pretty much everything; visual identity, the wine labels, olive oil labels, signage, interior design, communication. It is almost a full-time job; it is very absorbing. There is work to do for Esporão every day at our studio. I believe Esporão is the second biggest wine brand in Portugal, so it has been quite a challenge to work for them.

MF: And what about Quinta dos Murças?
EA: Quinta dos Murças is a relatively recent project.

MF: Has working with Esporão for a long time facilitated this project, in any way?
EA: Absolutely. The long relationship that we have built enabled to establish the project and the working teams exactly as I intended.

MF: But the brief you were given implied the refreshment of an existing brand image, is that correct?
EA: Yes, it is. But in reality, we started it all from scratch.

MF: I have read there was a great amount of research at the start of this design project.
EA: I was the one who proposed to Esporão that a multidisciplinary team ought to be appointed to conduct the research work.

MF: And who was assigned to that team?
EA: Well, first and foremost historian Gaspar Martins Pereira, who has made a highly valid work. Then also a team of documentalists…

MF: Of documentalists?
EA: Yes, yes. The documentalists in fact made a lot of research work for Pereira. And then a geologist was also contacted to provide information about the physical aspects of the property. This was all complementary to the work that Esporão was doing already, in order to make the best approach to winemaking. I also relied on the know-how of many other people: Amândio Rodrigues, who is the agricultural director of Esporão, David Baverstock, Filipe Caetano, the marketing director, and of course, João Roquette who is always deeply involved in the projects. So, you could say this was actually a large team, but it was also a great motivation for this project. Then, the final document produced by Martins Pereira was determinant for the set-up of the whole design project. I would say it was highly influential. The main aspect within it was, of course, the pioneer vertical vine. But that you know. You know the history of the estate.

MF: Yes, I have learned about the estate and I also read the document that Pereira has produced.
EA: So that was mostly where I got the inspiration from.

MF: But the whole strategy was built upon the initial methodology, is that correct?
EA: Yes, but that is the methodology I use for most of the projects I am involved with. In this case it has spoken to me about design, territory and the concept. I like to anchor the project’s motivations and the design solutions on the actual territory. That is why the final outcomes have these correlations. Above all, for an observer, provenance must be clear. When this is achieved, the project gains a level of assertiveness and a sense of belonging that really becomes its strength. If a formal solution is based on aleatory elements, then it can be put at stake easily, it becomes fragile. I make this very clear to my collaborators, but I believe using this methodology is also more satisfying for our clients.

MF: Is it also important that this particular design outcome belongs to that place specifically, and nowhere else?
EA: Absolutely. Murças belongs to that place and no other location.

MF: Is that a factor of added-value, you reckon?
EA: Of course, that makes it a unique project.

MF: How significant is design? I mean, the wine is certainly the most important thing, but what is the role of design, then?
EA: Design is highly important because of this: we create a rational foundation that allows to create an emotional foundation. This question is fundamental. This is what will feed into the different narratives built around the wine; the marketing sector, the commercial sector, the oenology sector, even the shareholders, they will all refer to these narratives. This is not only highly structuring, but will enable two things: the project’s differentiation and a belief in its value.

Of course, this approach is closely tied to the philosophy of Esporão, which is a ‘familiar’ philosophy. I would actually recommend that you read the mission statement of Esporão, it is all in there.

MF: I have to admit I was not as focused in Esporão as I was in the specific project of Quinta dos Murças.
EA: Yes, but Esporão is important too, because Esporão has defined an umbrella philosophy that works just as well in Alentejo than in the Douro.

MF: Why is it so?
EA: Well, because it is based on a respectful attitude towards the territory. Therefore, it is the territory that determines the approach.

MF: And you had that clearly in mind because you had been working for Esporão for a long time.
EA: Yes, of course. You have to understand that to a company with the dimension of Esporão, Quinta dos Murças is a micro-project. However, their attitude is the same, and it is very respectful towards the territory, the culture and the environment.

MF: Considering the ‘micro-scale’ you are referring, all those resources, i.e. the team that was commissioned, was that a proportional investment?
EA: For this company yes, absolutely. The scale is not relevant for them. They seek quality and talent. They will pay for it. But they do it because they trust that the talent will eventually aggregate added-value.

MF: So what you are saying is that they are confident that there will be a return.
EA: Yes, João (Roquette) has told me more than once that all the investment in design has payed-off.

MF: Let’s move on to the practical and formal aspects of the design project. The project had different phases; would you like to explain how they developed?
EA: Once the brand image was established, there was a clear strategy to differentiate the wines’ distinct levels. There was the entry-level, the intermediate level and the upper level. Photographer Duarte Belo (amongst others) has had a long collaboration with Esporão, so we decided to use his work to define the entry-level. That imagery has defined the specific design of Assobio red, white, and rosé.

Then, in the intermediate level, we have developed an image that draws from the basic element of Quinta dos Murças’ visual identity, the mark. This element is applied as a coloured background. The reserve wine, which is the top level, is the white label employing special paper and the blind emboss. That is basically how the whole ‘family’ is differentiated.

MF: I thought the reserve wine with the ‘white’ design was the defining one.
EA: It is difficult to say so, but in a way it was. There is a very curious episode regarding the design of the ‘white’ label. It used to be even ‘whiter’, did you know that?

MF: No, I didn’t. What happened, then?
EA: Well, it was actually the input of Roquette’s father, the Esporão ‘patriarch’, that made it into the current design. You know that today it displays an amount of typographical information, and, of course, also the ‘engraving’, or the illustration made by Modesto depicting the estate. But before, it was just a pristine, minimalist proposal, with almost no typographical elements and no illustration whatsoever.

Roquette’s father made this comment that he felt something was lacking on the wine label, but he didn’t quite know what it was. He said it lacked some ‘classicism’. That is why I added the textual information typeset in Garamond, and an illustration that looks more as an engraving.

MF: Do you think he made that suggestion because it was a wine from the Douro?
EA: Maybe, yes. He thought my initial proposal was probably too spartan and suggested that a more classic approach might be appropriate. Therefore, I added those two elements, the typography and the illustration, as well as the blind emboss.

MF: So, your initial proposal was even more minimalist?
EA: Yes. The only aspect that was clearly there already was the scale of the wine label. It was always meant to be a ‘blanket’.

MF: Was that ‘blanket’ thought as a way of inferring added-value, you reckon?
EA: Yes. There is probably some prejudice in what I am about to say, but the so-called ‘educated’ consumer, who tends to buy or to consume fine wines, is able to establish a relation between the quality of the wine and the visual quality of the wine label. I have no doubts about that. Therefore, there are expectations in terms of the visual image. And, if that is the case, then ‘blanket’ makes perfect sense, I believe you understand what I mean.

MF: Is that why you expanded the design into the ‘coloured blankets’, then.
EA: Yes, for the intermediate level, the range that includes Minas, Margem, VV47 and Ânfora.
MF: I believe I have the images and digital files of all the coloured ones, but aren’t they supposed to include an illustration? Each one of them?
EA: Yes, except the Anfora. But that is still being implemented, it is not ready yet.

MF: So this was that intermediate range, between the photographic range and the ‘white’ label.
EA: Exactly. It is a different interpretation of the concept of the ‘reserve’ wine. Of course, we had to keep the white label unique, so we opted for a colour variation.

MF: Can you talk about the actual colour tones, then. Because I notice that the colour density is quite unusual, and an aspect that you had explored already in the photographic labels.
EA: Yes. That is right, but again it is all about interpreting the place. And the place suggests such density. It was necessary first and foremost to establish a difference between the distinct wines. And because we had already addressed the ‘Douro classicism’ with the white label, we also sought a pattern of disruption, without disregarding what is typical in the Douro. Hence the intensity of the colours.

Actually, our very first proposal for this range was even more disruptive than what you are seeing now. We even experimented with fluorescent shades, we tried the craziest colours.

MF: Really? That is quite unusual.
EA: Yes, well, again that is the good thing about Esporão. We always have a budget for experimenting, to make printing proofs, etc. So, we gave it a try.

MF: That is also uncommon, how often do you experience that with a client.
EA: Indeed, and that gives us great opportunities to experiment and to be bold, you know.

MF: How come you didn’t produce the fluorescent wine labels, then?
EA: Well, I realised it was probably too much. It was too edgy. We ended up opting for colours with a character, for example the blue colour. I suppose they can all relate to the Douro, in terms of intensity. So, the point is not just to be novel and original, but to give ourselves permission to move a bit further, at least once we have achieved a first level of efficiency and recognition.

MF: Are you saying that if you had not tried the more ‘classical’ wine labels first, it would not be possible to come up with the coloured ones.
EA: Exactly, we must work layer upon layer. We opted for a more simple and neutral typography through colour. Then, the colour statement becomes even stronger with the matching colour of the capsule. That is also an important detail in this project, you don’t see coloured capsules that much.

MF: So the Douro has an influential historical background? Is that a constraint for you?
EA: In a way, yes, it is like in Bordeaux. In these ‘old world’ regions, of course, the burden of tradition is often high. It is sometimes hard to break the rules and to make a difference.

MF: But you said that you had already walked the more traditional path.
EA: Yes, I mean, for Marçãs we have built a strong and more conventional image first, and then we started moving forward. It takes time and trust to be able to do that. In my case this is only possible due to a great sense of partnership and share between the studio and Esporão. Our shared values, the open dialogue that we have, that is what makes it possible.

MF: Do you think that working with wine, in general, requires time? For example, in comparison with other types of design work.
EA: Well, first of all, I have to say that my attitude in respect to any design project is always the same. I do think time is fundamental in all the design projects I am involved with. Time is essential. Time for reflection. Time for drawing. Time for building relationships. What happens with wine is that you also have to pay attention to other aspects that happen beyond the studio, such as the wine cycle. That, of course, adds a new dimension to the projects. You have to make yourself available for that. Take the case of Quinta dos Murças, for example. That place has been a whole discovery. It has taken some time for the team of oenologists and viticulturists to discover the soils, to find out what is their value and to seek the best ways of exploring that value. Design, too, must follow that pace. It is an ongoing project; we must be prepared to adapt and to evolve.

MF: You also mentioned your team, and you wanted the team to come to Quinta dos Murças so that they become familiar with the place, why is that important to you?
EA: That is very important, I believe. I usually go first, and for me it is not conceivable to pursue this type of work without knowing the place. And then, of course, I take the whole team there, too. It is very important that they understand what they are working for. I have only one rule at the studio. The whole team must fit into a car. That means a maximum of five people.

MF: Do you organise those journeys in specific moments of the projects?
EA: At all times. I try to implement this in all the big projects that we develop. At the studio, we want to make work that people will appreciate and preserve. To make the best of that work I think it is very important that we know the people and the places. I think that such initiatives provide more knowledge about the projects, and it becomes easier to work within the team. It is a way of getting everyone involved, really.

MF: And what is your role in the design process? Are you an ‘operative’ designer or more the creative director?
EA: I have not been an ‘operative’ designer since we stopped using Freehand!

MF: That is a long time [laughs]. But I ask this because I know you like to draw, you like to sketch ideas on paper.
EA: Yes, that’s right, I like to draw and I motivate everyone in the studio to draw. But the design process with the team is usually very structured. We have successive meetings, we hold brainstorm, we share and discuss ideas. I usually come up with a motto and then the project gains its own pace. Sometimes the outcomes are unexpected. But it is always a collaborative, constructive process. Of course, I supervise everything. Nothing goes outside of the studio without my approval, I am responsible for that.

MF: What was the very first step for Quinta dos Murças, then?
EA: In this case, it all started with the methodology. But it was mostly my perception after reading what Pereira had written and after visiting the estate. I realised the vertical vine impacted the orography of the place, and that was the starting point.

MF: And then everything else developed upon that initial imagery.
EA: Yes, it was like turning an initial idea into a matrix, and I think this happens pretty much with all the projects that we work with. Of course, you look at this brand and you find reminiscences with the visual image of other brands, like Warner Brothers or Volkswagen. I am aware of that. But that is just because because the visual elements are minimalistic, it happens all the time in our work. The origin of this design is genuine, meaningful and authentic – and Esporão understood that. For me that is the most important thing.

MF: To wrap up our conversation, how important is it to you to supervise the printing process or the production.
EA: I think that part of the process is very important. I can’t be everywhere, of course, but I try to supervise the final phases of the projects, especially when it has to do with big decisions. I try to do it personally.

I will tell you with this funny story, when I was supervising the colour of the capsules for Esporão, the people at the production sites were very suspicious. They would always ask me, ‘are you sure this is the right colour’? That was ten years ago, of course. Now whenever I go to ACR or Cúspulas do Norte, they tell me other clients always want to see the capsules of Esporão. I suppose we have become a reference!
Different phone conversations were held, and a questionnaire was sent to Rivotti after the first conversation, but the art director preferred to respond by phone. Visual material such as print files were sent later by the design studio. Conversation starts with brief talk on previous email exchanges and situating the project (Crochet) within the research;

MF: Can you explain how you got involved with this project?
RR: Well, when this project came up, I was working with Susana Esteban and designing wine labels for her projects in Alentejo. I was also acquainted with Sandra, and worked for Foz Torto, the winery that offered the two winemakers the equipment and logistical support, so they were able to pursue their wine project. I happened to be at the winery for a different project, therefore it was where we first met. They asked me to help them with the image and the brand name, and it all started on that brief encounter. It was illuminating, because I listened to them and the concept came to my mind right there.

MF: And were they happy with it?
RR: Yes, of course, they thought it made perfect sense. In this case, our first contact was very spontaneous and I think that is why it worked so well. Two women getting together to catch up, and I immediately though of the idea of crochet. That was it.

MF: How important is the provenance of the wine for you? In this case, for example, have you been back to the Douro?
RR: Yes, of course. At the studio we think it is fundamental to visit the locations, it is very important to be inspired by the place of origin, the landscape. We also like to have a close contact with the producers. We listen to the winemakers or the oenologists, and we learn about the wine.

MF: And then, how did the project develop at the studio?
RR: When the main concept was clarified, we researched through old crochet books, we literally went through our grandmother’s treasure chest to find traditional visual motifs and monograms. We were looking for inspirations to produce the final design.

MF: You mean you and the design team, or were the winemakers involved in this research, too?
RR: We have developed the graphic work mainly at the studio, but they were very involved as well. Susana’s grandmother had books and a lot of actual crochet work, so we all looked into her old books and designs.

MF: Would you still have those books, or research material, so that I could add it to my data collection.
RR: No, I am afraid not. We just used it for the initial research.

MF: Was there any specific reference to the Douro, and was this important within the particularities of this project?
RR: Well, you can’t really overlook the Douro when you are working on a wine from that region. But it doesn’t have to be obvious. In this case, the reference to the Douro was made by establishing a connection with the simplicity and the sophistication of Porto wine labels, as well as the use of black and white.

MF: So the absence of colour on the wine label was chosen with that purpose.
RR: Yes, white, as well as the pristine style of the whole packaging, that is an essential aspect of the design project.

MF: Do you think this wine label design would be appropriate for a wine originating from a different region?
RR: Yes, maybe. I suppose we were more concerned with the project and the concept than with place of origin. In that sense, even as a women’s project, it could have happened anywhere else. In fact, the two friends are making a new wine together in Alentejo (southern Portugal) and I am designing the wine labels and the visual image as well. It is called Tricot.

MF: What else is created around the wine’s identity?
RR: Although I think the wine label is very important, there is a lot of work beyond that element. After we create the concept for the brand’s communication, we make the wine label and the packaging (where there is the need for one). But we also design presentations of the product, brochures and technical sheets, the website, advertisements, and any other form of graphic communication that must be coherent within the main design approach.

MF: So was the concept completely your responsibility, the winemakers had no idea of what the wine should be called?
RR: Yes, that was entirely my idea. They had a great project, they had a very good wine. Of course, considering the history if the two winemakers, this was not an average wine, it was a very special wine. Despite the limited production, it was a premium wine and they wanted to get it into the market. But they had no idea of how it might be branded, that’s why they asked me for help. So, apart from the wine, of course, the concept was conceived from scratch at my studio. The brand name ‘Crochet’ was suggested by me. You know their story, the two friends who were separated due to their professional and familiar commitments, and then found an ‘alibi’ to get together, a chance to catch up with each other. So just as women, traditionally, get together to make crochet and to have a chat, these two women have found their particular ‘crocheting time’ to be able to meet more often. Just that in this case the craft is not embroidery, it is winemaking. We are talking of a very limited production, so it really is more of a ‘hobby’ than part of their full-time job.

MF: How did that concept develop within the whole project?
RR: Well, I usually start by defining a strategy, which was what happened in this case, and then, when that concept is clearly defined with the winemakers, then we start to develop the visual aspects and the graphic design. Whatever is needed. I believe that building strategic viewpoint is what differentiates my work from the work of other designers, or at least what characterises the work at the studio. These stories that we create and the strong concepts, that is the core of my expertise.
MF: Is that concept, in this case, an ‘authentic’ interpretation of the project?
RR: Yes, I think so. The stories are always stronger and more valuable when they are authentic, or when they mirror authentic aspects of the projects. It is always more interesting to have a real detail that can be explored, than an invented story.

MF: Yes, but invented stories exist too, especially in the world of wine.
RR: Well, you can always have a beautiful design and anyone can invent a nice story, but I believe the value lies in authenticity. And for the brands’ future that is very important too.

MF: So, the project, despite being a limited production, as you said, has been profitable.
RR: Yes, it has. Otherwise they would have not continued.

MF: Regarding the idea of crochet as a women’s tradition, what was your thinking when the concept emerged?
RR: Well, I see it as an analogy. It is an analogy with a typical feminine world: women do get together to make crochet. You might ask why I established this specific connection with crochet, because women get together to make other things too. But crochet is a meticulous type of work and there were aspects associated with this particular craft that made a lot of sense in the analogy: the use of white colour; the simplicity; the perfectionism; the savoir faire. All of that is present in crochet, as a handicraft. You can’t learn how to make it properly from one day to another, it takes time to perfection. Therefore, it is an art, just like the art of winemaking.

MF: You mentioned the feminine world; how relevant is that connection? I realise this is a rather uncommon project because all the aspects of its identity – from winemaking to the design – were conceived by women, including yourself, would you agree?
RR: Yes, yes, absolutely. There is no way this project would have worked if they weren’t women, or maybe if I wasn’t a woman. That gave me the opportunity to explore the feminine details. When I learned about their winemaking process, I recognised the meticulous and perfectionist work that is so typical of craftswomen. And of doing things as a duo, that is so typically feminine.

MF: How was all of that transposed into the brand image?
RR: Well, the team, the pair… That was another fundamental aspect of the concept.

MF: Considering your experience, would you say the world of wine is essentially a men’s world?
RR: I would say the world of business is a masculine world. But fortunately, we can see that it is evolving, and there are many outstanding women in the business now.

MF: Let’s talk about the design elements. The wine’s logo, for example, what was the idea behind that particular typographical form?
RR: The brand name or logo was specifically tailored for this project. The idea really was to mimic the movements of the crochet technique, the loops.

MF: I also interpreted the design in connection with the traditional stencilled technique used to identify the port wine bottles, does that make sense to you?
RR: I suppose you can make that connection, but that was not the intention. We wanted to produce as much visual interpretations as possible around the concept of crochet, or of crocheting.

MF: And the remaining typography, the typeface used on the back label for the technical information, is that Akzidenz Grotesk?
RR: I think so, yes. I can’t remember exactly. When we send you the digital materials, you will be able to confirm that.

MF: Were you saying that the motives on the cork, the capsule, and the blind relief are all expressions of crochet? And the laser-cut packaging.
RR: Yes, of course, all those elements have to be worked as a coherent brand image. At the studio we develop packaging design, and for us packaging design is everything.

MF: But do you start with the wine label, and that determines the packaging, or is it the other way round?
RR: At the studio, we differentiate the primary packaging, and the secondary packaging. The primary packaging includes all the elements around the bottle, such as the wine label, the cork, and the capsule; the secondary packaging concerns boxes, bags, etc. In the end, all of that has to be functional and visually coherent.
G  Timeline of relevant events in the research

MAY-JUNE 2014
Participation in ECA Postgraduate Research Festival, Postcard Showcase

JULY 2014
Attendance/member of scientific committee, ICDHS Conference, Aveiro University

APRIL 2014
Attendance of the Forrester’s Douro Map conference, Port Wine Museum, Porto

MAY 2015
Attendance of London Wine Fair, Olympia, London

MAY 2015
Attendance of RAW Artisan Wine Fair, Old Truman Brewery, London

JUNE 2015
Presentation at PGR Work in Progress Day, ECA, Edinburgh

SEPTEMBER 2015
Attendance of 1st Douro Wine Fair, Quinta do Vallado, Douro

SEPTEMBER 2015
Attendance of Wine Origins Symposium, IVDP, Porto

OCTOBER 2015
Attendance of O Marco Pombalino conference by António Barreto, IVDP, Porto

NOVEMBER 2015
Presentation at PhD by Design conference, Goldsmiths, London University

NOVEMBER 2016
Presentation at PGR Work in Progress Day, ECA, Edinburgh

NOVEMBER 2016
Joint paper presentation at Douro Museum conference, Peso da Régua

JANUARY 2017
First research presentation at the IVDP, Porto

FEBRUARY 2017
WSET Level 1 Award in Wines, wine course with qualification, Porto

MARCH 2017
Second research presentation at the IVDP, Porto

SEPTEMBER 2017
Attendance of Science and Wine conference, AEVP, Porto

MAY 2018
Communication on Science and Wine website, by invitation (Paula Silva)

MAY 2018
Presentation at international seminar Value from Territory and Terroir, UTAD, Vila Real, by invitation (Tim Hogg)

SEPTEMBER 2018
Presentation at Empack 2018, Exponor, Porto, by invitation (IVDP)
Public presentation

The following slide show synthesises an initial body of findings and research. It has been used in different events with minor changes/adaptations, but the central contents and topics were maintained, as shown below. A report of the main presentation at the IVDP is appended.

#1 TITLE
The title outlines the following topics:
- the main research problem (the missing dialogue)
- the central topic of this PhD (territorial branding)
- the main evidence and focus of the analysis (Douro wine labels)

#2 CORE ARGUMENT
The central argument explored and illustrated in the presentation:
The Douro wines are either inapppropriately or inconsistently branded because the concept of territorial branding is not central to communication.

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Brief explanation of the Douro within this context.
(adapted according to audience)

#3 ORIGINALITY/FOCUS
What is new in this thesis is the exploration of the concept of territorial branding in the field of design, through design artefacts.

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A specific approach for visual analysis is part of contribution to knowledge; combining 'reverse engineering' of wine labels with feedback from designers and stakeholders. The analysis provides a holistic view of the designers' work, specific branding approaches and thorough coverage of the design process.

#4 STATE-OF-THE-ART vs. PROPOSITION
Examining the evidence of initial survey enabled to identify and categorise state-of-the-art strategies, as well as atypical strategies which exemplify and support the central argument.

#5 THE DEBATABLE APPROACH
Nostalgia and historicism (examples 1+2) are recurrent (stereotyped) branding strategies; Visual elements may bear a relation to the territory; reasons for the use of Old World clichés have been identified, but the strategy fails to tell particular, authentic, interesting stories.

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Examples 3 and 4 are more controversial because they undermine the importance of the product. The labels would work well regardless of the wine inside the bottle. They could have been made anywhere. The link between the visual identity and the territory is either vague or completely absent.
#6 MISINTERPRETING VISUAL ELEMENTS 1
1. When examined isolated the overall design of the label looks appropriate and it is formally well executed;
   --
2. The image suggests the typical sunny climate suitable for growing vines in southern European countries;
   --
3. The wine's name (Cataplana): explaining the inadequate link with a pan from the Algarve, used to cook seafood.

#7 MISINTERPRETING VISUAL ELEMENTS 2
1. When observed in the selling context the wine 'merges' into other territories (namely Spanish regions), losing its particular identity;
   --
2. Within the trader's range the wine merges into the broader category of 'Portuguese wines', because different wine regions or styles are illustrated similarly;
   --
3. A link with Spain's iconic tourism logo, designed by Joan Miró

#8 A MATTER OF BALANCE
The photograph is metaphorically illustrative of both the contrast and the balance between tradition and innovation in the Douro; The background shows the long-established setting of vines in terraces or 'patamares', whereas in the foreground a more modern 'vertical' setting can be observed.
The idea of a desirable balance that tackles the characteristic diversity of the Douro is resumed further on in the presentation.

#9 SOBER SOPHISTICATION
Churchill's wine labels, redesigned in 2010 by Interbrand, make the point of modernity without losing character nor the connection with the territory.

The unusual point of view of the pictures, printed black and white on large labels, gives them a tactile appeal and according to creative director Daniela Nunzi-Mihranian conveys a sophisticated, yet elegant look that was meant to expand across the brand's port wines.
#10 SILKSCREENED BOTTLES

According to designer Miguel Salazar the use of silkscreened 'labels' for Douro DOC (a method traditionally found in Port wine bottles) was a response to the producer’s constraints but ended up conveying an original brand image:

Although they are quite enigmatic, it is possible to trace the iconic, beautiful illustrations (of different authors) to symbolic aspects of place of origin.

#11 SILKSCREENED BOTTLES 2

... For example, the seemingly ambiguous character on Miura 2007, wearing a raw wool costume and a wooden mask, illustrated by former textile designer Américo Martins. The figure depicts an old tradition in the nearby village of Lázaro.

#12 THE INTERPRETATION OF THE TERROIR(S)

1. This branding strategy is an example of a detailed design process. The designer Eduardo Aires brought in the contribution of a historian and a geologist to understand the particularities of the place.
2. The different viticultural aspects within the property were interpreted graphically in the embossed pattern and foil stamped logo.

Large labels printed in high quality paper convey an image of value and demonstrate it is possible to update a classic style without losing character and a link with provenance.
3. An old manor house and a new owner, are represented by an allusion to heraldry, rather than pastiche. The graphic pattern is also used to identify and decorate the corks.
4. Difference: the backlabel of one of the wines of Quinta dos Murças – Assobio – is a manifesto against the construction of a dam in one of Douro’s tributaries.

#13 CONCLUSION

As a conclusive argument, the presentation resumes the initial contextualisation: winemaking in the Douro is difficult, costly, partially artisanal, subject to strict regulations and to a great extent unsuitable for mass or industrial production. Appropriate branding solutions exist, but they are the exception and not the rule.

Designers and stakeholders ought to be discussing this.
Report of main presentation at the IVDP

Title of presentation: Branding the Douro territory in wine labels: a missing dialogue
Location: IVDP – The Port and Douro Wines Institute, Porto
Date: 12 January 2017

Attendance
Manuel Novaes Cabral, President of IVDP
Bento Amaral, meeting organiser (Director of Technical and Certification Services)
Alfredo Silva (Head of Supervisory Board)
Seven staff members from the IVDP

Preparation/previous meetings
Three consulting meetings were held at the IVDP (records and transcripts in possession of author) with the presence of Bento Amaral and Alfredo Silva. Following an initial portrayal of the craft given by Amaral, most of the discussion in these meetings regarded operative processes related with label approval, the regulations and their links with the design work. In the email exchange with Amaral that preceded the IVDP presentation, it was not guaranteed that Manuel Cabral, the IVDP president, would be present. However, I emphasised the importance of the president’s attendance. I also mentioned challenging issues might be raised by the discussion.

Content
Context: brief presentation of myself and the PhD research
Visual presentation: slideshow first delivered at WIP session (translated to Portuguese).
The general aim was to give the attendees an understanding of the current issues raised by the research.
Other aims: to review current communication strategies for the Douro wine labels; to identify its deficiencies and values; to suggest changing possibilities; to stress the advantages of change; to set the premises for a debate.
Challenge: to expose myself as a researcher before an important player within this context. To subject the study’s findings to ‘real-world’ scrutiny.
Expected outcomes: debate; a possible practical link with the research.

Interaction
First questions of attendees started while I was presenting the slideshow; questions addressed mainly the implications of design in the Institute’s work – regulations, technical issues and approval of labels.
Cabral suggested that the whole slideshow be presented first, with Q&A in the end – which all agreed on;
Cabral made written annotations throughout the whole presentation;
First comments. After delivering the presentation, I was asked to go back to slide #2. Cabral stressed he was in total disagreement with my initial argument, and that he could not see how that was supported.
I understood that his positioning might come from an economic standpoint: the fact that the Douro is a growing wine trade and that some of the projects I was critical about are doing very well in terms of sales.
As we moved on to slide #4 Cabral questioned whether anyone could claim what is ‘right and wrong’ within the trade or even dare to advise companies on the strategies they might use. I replied by highlighting the careful word choice (the words wrong and right were not used in the presentation), and that these were judgements based on a particular visual analysis, with a particular criterion. I stressed that they were not meant as ‘advice’.
Questions on slide #6 (Cataplana Douro wine) were posed differently by both attendees and Manuel Cabral; the latter was quite concerned that the wine’s perceived name was ‘Douro’. Furthermore, he could not understand how that was possible under IVDP’s regulations. On a different perspective, Amaral and Silva questioned whether particular design constraints set by IVDP’s regulations, such as the ones defining typographical elements, were presented in adequate terms.
Addressing Cabral, I replied that all the wine labels presented were in accordance with the IVDP’s regulations. As for the other questions, I stressed that some rules do contradict fundamental design criteria (e.g. visibility and readability). And although they affect design work directly, it is clear that designers were not involved in the regulations’ set up.
Slide #7 originated the most unexpected comments. This slide demonstrates how a Douro wine label could be visually subsumed under the general categories of ‘Portuguese wines’ and ‘Spanish wines’, thus losing its specific territorial identity. And of how, inadvertently, the whole strategy might pass unnoticed under the IVDP supervision, despite the regulations.
Cabral highlighted the importance of the country brand, and remarked that merging into Spain was not necessarily bad, by mentioning ‘… we are all Iberian, after all’.
The president of the IVDP also made a note regarding that the dry wines’ trade within the Douro was nested into a niche market, somehow justifying a lessened strategic importance regarding their communication.
Cabral agreed on the lack of dialogue (so did other attendees in the room) and the need to promote a constructive debate with the participation of both designers and stakeholders. Cabral concluded that despite our contradictory positions he was thankful for the presentation and he look forward to further discussion; by this he meant beyond that first restricted audience, i.e. beyond the IVDP. On their final notes, both Amaral and Silva clarified that they were not in total accordance with what had been transmitted by Cabral. They also regretted that the IVDP’s communication team could not be present (due to a simultaneous meeting). I restated my availability to come back, and thanked the attendees. We discussed specific topics and examples following the questions of other attendees; I also used complementary printouts to provide further explanations. As the end of the meeting approached, I told Amaral I would send an email for feedback.

Conclusive notes
Cabral’s comments on slide #7 were unforeseen, considering his positioning as a ‘territorial’ advocate. Staff members, particularly Alfredo Silva, did not seem as concerned with the ‘problematic’ examples pointed by Cabral. Silva believes the regulative team often lacks the right tools to work within this context. They attempt to be rigorous, in terms of visual analysis and interpretation, whilst acknowledging they are not experts in the field. The discussion enabled the confrontation of opposing ideas, and the meeting provided a positive exposure and a lively debate with valuable comments for the research. It was emphasised that I was available for further debate and eventually for concrete working proposals. Overall, it was a very different experience from presenting in the academic environment (e.g. the ECA, Edinburgh and Goldsmiths, University of London).

Follow-up
A follow-up email from Bento Amaral (Jan 24) acknowledged the significance of the presentation. Amaral mentioned a possible collaboration with the Institute, although, in his own words, they ‘cannot see how’. Cabral suggested I should come back to make a similar presentation to other members of the staff and of the communication department, which happened in March. Douro University (UTAD) announced the start-up of the Wine and Vine Innovation Platform, located in Régua/Douro. The platform will be directed by scholar Tim Hogg, who has been referenced in the writing. An invitation by Hogg was made, to present at the conference Value from Territory and Terroir, Régia Douro Park, in May 2018 (Appendix G).
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Figures 2.1-2.4: The Douro Museum
2.6: Casa Ferreirinha, Sogrape Vinhos, SA.
2.7: Wines of Portugal
4.9 #4: Douro profundo
4.13 #2: Ocântio Passos
4.16: Alessandri Design & Brand Studio
4.18 #1: Alessandri Design & Brand Studio
4.19-26: Alessandri Design & Brand Studio
4.28 #1: Alessandri Design & Brand Studio
4.30-34: Niepoort Wines, SA
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A 1-2: IVDP
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H #12: Studio Eduardo Aires
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