




Intangible cultural heritage, local entrepreneurship, and sustainable tourism in an insular context: The case of Madeira Wine Traditions


[10.29073/jer.v4i2.70](https://doi.org/10.29073/jer.v4i2.70)

Received: April 29, 2026.

Accepted: June 20, 2026.

Published: Month XX, 20XX.

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Abstract

Intangible cultural heritage (ICH) has increasingly been recognized as a strategic resource for sustainable tourism development, particularly in island territories where cultural identity and endogenous resources play a central role in territorial sustainability. This article examines the case of Madeira Wine Traditions within the context of the ongoing candidature to UNESCO's Representative List of the Intangible Cultural Heritage of Humanity, exploring how heritage safeguarding may contribute to tourism development, local entrepreneurship and community engagement. The study adopts a qualitative case study approach, combining documentary analysis, participant observation and semi-structured interviews with 49 representatives of Madeira wine-producing organizations and 24 wine growers. The empirical material was analyzed through thematic content analysis focusing on four dimensions: heritage safeguarding and cultural identity, community participation and territorial mobilization, tourism entrepreneurship, and linguistic proximity. The findings reveal broad stakeholder support for the safeguarding of Madeira Wine Traditions and highlight the UNESCO candidature as a mechanism for awareness-raising, institutional cooperation and community mobilization. The results also suggest that the valorization of this heritage may create opportunities for authentic wine tourism experiences while reinforcing cultural transmission through linguistic proximity. At the same time, challenges related to vineyard abandonment, demographic ageing and tourism pressures remain significant. The study demonstrates how intangible cultural heritage can support more sustainable tourism strategies in island destinations by strengthening cultural identity, community participation and local development.

Keywords: Entrepreneurship; Intangible Cultural Heritage; Linguistic Proximity; Madeira Wine Traditions; Sustainable Tourism.

1. Introduction

The growing demand for more sustainable forms of tourism has increased interest in the role of culture as a driver of territorial development. Beyond its economic contribution, tourism is increasingly expected to support cultural preservation, strengthen community participation and contribute to the long-term sustainability of destinations. Within this context, intangible cultural heritage (ICH) has emerged as a strategic resource capable of enhancing the authenticity and distinctiveness of tourism experiences while reinforcing local identity and social cohesion. The UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage (2003) contributed to a broader understanding of heritage as a living expression of communities, encompassing knowledge, practices, skills, oral traditions and social rituals transmitted across generations. Recent studies suggest that the safeguarding of ICH can generate benefits that extend beyond cultural preservation, contributing to tourism diversification, local development and community resilience. These dynamics are particularly relevant in island territories, where geographical constraints and economic dependence on tourism often create challenges for sustainable development. At the same time, increasing attention has been given to the relationship between cultural heritage and entrepreneurship. Heritage-based tourism initiatives can create opportunities for local businesses while supporting the preservation of traditional practices and cultural



landscapes. However, achieving this balance requires the active participation of local communities and governance models capable of integrating cultural, economic and social objectives.

Language also represents an important dimension of cultural heritage and tourism development. Linguistic proximity can facilitate communication, knowledge transmission and the interpretation of cultural practices, strengthening the relationship between heritage bearers, visitors and tourism markets. In Portuguese-speaking contexts, language may function not only as a communication tool but also as a cultural asset that contributes to identity formation and entrepreneurial initiatives associated with cultural tourism. The Autonomous Region of Madeira provides a particularly relevant setting for examining these relationships. Madeira Wine Traditions constitute one of the island's most distinctive cultural expressions, integrating centuries-old viticultural knowledge, production techniques, social practices and specialized vocabulary associated with wine production. Simultaneously, the sector faces important challenges, including vineyard abandonment, demographic ageing, labour shortages and increasing pressure from tourism and urban development. Against this background, the ongoing candidature of Madeira Wine Traditions to UNESCO's Representative List of the Intangible Cultural Heritage of Humanity offers a valuable opportunity to analyze how heritage safeguarding processes may contribute to community mobilization, tourism entrepreneurship and sustainable territorial development.

The main objective of this article is to examine how the valorization of Madeira Wine Traditions as intangible cultural heritage may contribute to sustainable tourism development and local entrepreneurship in an island destination, while exploring the role of linguistic proximity in cultural transmission and tourism experiences. To achieve this objective, the study adopts a qualitative case study approach based on documentary analysis, participant observation and semi-structured interviews with representatives of wine-producing organizations and wine growers involved in the safeguarding process. The article is organized into six sections. Following this introduction, the literature review discusses the relationship between intangible cultural heritage, tourism, entrepreneurship and linguistic proximity. The subsequent sections present the case study, research methodology, empirical findings and conclusions.

2. Intangible Cultural Heritage, Language and Entrepreneurship in Sustainable Tourism

Sustainable tourism has been widely discussed in academic literature as a balance-oriented approach between economic growth, environmental protection, and socio-cultural equity (UNWTO, 2018). In this context, Higgins-Desbiolles (2018) argues that sustainable tourism must go beyond a strict environmental vision, integrating culture as a central element in the construction of resilient, inclusive and socially just destinations. This perspective underlines the need to incorporate cultural, identity and community values into tourism planning and development models. Thus, the importance of socio-cultural and economic factors in the development of sustainable tourism, points to a close relationship between intangible cultural heritage (ICH), language and cultural identity, and tourism entrepreneurship. These dimensions are often analyzed together because they contribute to the attractiveness of destinations, the innovation of tourism products and the generation of sustainable socio-economic benefits for host communities (Hall & Zeppel, 1992; Richards, 2018). The safeguarding of intangible cultural heritage — which includes cultural practices, oral traditions, festivals, linguistic expressions and community knowledge — has assumed increasing relevance in the context of sustainable tourism, being recognized as a valuable tourist resource, since it offers unique experiences that promote the authenticity and differentiation of destinations (UNESCO 2003; UNESCO, 2019; Timothy, 2020).

Lenzerini (2011) stresses that intangible cultural heritage should be understood as living culture, whose protection is inseparable from sustainable development and the dignity of the communities that practice it. In this sense, the integration of the ICP in tourism offers can strengthen the attractiveness of destinations, particularly when based on participatory management models and respect for local values (Kim et al., 2019). In the European context, Nunes (2024) empirically demonstrates that local identity and the preservation of the PCI positively influence the perception of tourism sustainability by residents and visitors, highlighting the role of language and regional cultural expressions as key factors in the sustainable enhancement of peripheral and island territories. However, the sustainable exploitation of this heritage requires not only its preservation, but also its



integration into tourism development strategies capable of generating local entrepreneurial opportunities and strengthening the cultural and economic capacities of communities (Timothy, 2020). The literature also shows that intangible cultural heritage can function as a factor of competitive differentiation, attracting segments of tourists motivated by deep and significant cultural experiences (O'Leary et al., 1998; Richards, 2018; Smith & Robinson, 2006). This role of the PCI has been analyzed in the light of emerging trends in experiential and responsible tourism, in which the active participation of the visitor is particularly relevant.

However, several authors warn of the risks of excessive commodification and commodification of cultural practices when they are simplified or decontextualized for exclusively tourist purposes (Khaokhruemuang & Chueamchaitrakun, 2019; Soini & Birkeland, 2014). The main challenge is thus to balance the protection of cultural authenticity with the need to make heritage accessible and intelligible to visitors, ensuring that the local community retains control over its cultural expressions (Uslu et al., 2024). In this context, Pine and Gilmore (2011) argue that immaterial cultural experiences, by involving active participation and emotional meaning, constitute central elements of the so-called "experience economy". Cultural tourism thus ceases to assume a merely observational nature, becoming an interactive practice that promotes a greater connection between tourists and host communities, reinforcing the attractiveness of destinations that preserve and actively promote their ICP (Richards & Wilson, 2007).

Language, as a cultural heritage and shared identity element, also plays a strategic role in the dynamics of tourism, as illustrated by the case of the Community of Portuguese Speaking Countries (CPLP). In addition to being a means of communication, language is a cultural asset that influences mobility, social cohesion and the construction of transnational networks of tourism cooperation (Reto, 2012; Santos, 2019). In Portuguese-speaking contexts, linguistic proximity facilitates the creation of business networks, tourist flows and the circulation of knowledge, contributing to the dynamism of entrepreneurship in the sector (Esperança, 2010; Reto, 2012; Santos, 2019). The appreciation of the ICP as a market resource depends mostly on the ability of local entrepreneurs to communicate authentic cultural narratives, reconciling cultural value and economic return — a central tenet of sustainable tourism entrepreneurship (Freitag & Hjalager, 2021). Empirical research reinforces that the articulation between intangible cultural heritage, entrepreneurship and language has positive impacts on local development and social inclusion.

The study by Gonçalves, Dorsch, and Figueiredo (2022) demonstrates that tourism projects that incorporate intangible traditions, local knowledge, and cultural narratives tend to generate higher levels of visitor satisfaction and greater retention of value in host communities. This is particularly visible in initiatives associated with traditional festivities, typical gastronomy and handicrafts, elements that, when communicated and experienced in Portuguese, reinforce the sense of authenticity and belonging, both for Portuguese-speaking and non-Portuguese-speaking visitors. Additionally, studies carried out in Portuguese-speaking countries show that the language can function as an instrument of territorial branding, facilitating access to regional and international tourist markets and enhancing the creation of business partnerships, with positive effects on cultural entrepreneurship and the development of local micro-enterprises (Schneider et al., 2021).

In the light of this framework, the case of the Madeira Wine Traditions is a particularly expressive example of how intangible cultural heritage can be mobilized as a strategic resource for the development of sustainable tourism and local entrepreneurship in island contexts. Madeira's traditional winemaking practices integrate a complex set of technical knowledge, linguistic expressions, productive rituals and forms of social organization transmitted intergenerationally, which constitute a privileged basis for the creation of authentic and differentiating tourist experiences, in line with the dynamics of experiential tourism (Pine & Gilmore, 2011; Richards & Wilson, 2007). The enhancement of this heritage, when articulated with small-scale entrepreneurial initiatives and participatory management models, has the potential to strengthen the competitiveness of the destination, promote the retention of value in wine communities and diversify the tourist offer beyond conventional products (Richards, 2018; Timothy, 2020). In this process, linguistic proximity, namely in the Portuguese-speaking space and with the Madeiran diaspora, emerges as a facilitating factor for communication,



cultural interpretation and the construction of territorial narratives capable of sustaining entrepreneurial projects based on wine and culture. The following section empirically analyses the application process of Madeira Wine Traditions to UNESCO's Representative List of the Intangible Cultural Heritage of Humanity, exploring how these theoretical principles materialize in a concrete context of heritage enhancement, tourism entrepreneurship and territorial sustainability.

3. The Traditions of Madeira Wine and the Sustainability of the Destination — An Articulation Between Intangible Cultural Heritage, Language and Entrepreneurship

Following the theoretical framework presented in the previous section, this section focuses on the analysis of the case of Madeira Wine Traditions as a manifestation of intangible cultural heritage with strategic relevance for the development of sustainable tourism and local entrepreneurship in an island territory. Island regions face specific challenges in terms of sustainable development, associated with their peripheral location, small territorial scale, limited resources and high environmental vulnerability (Baldacchino, 2006; Sharpley, 2009). In this context, Madeira Wine plays a central role in the historical, cultural and economic identity of the Autonomous Region of Madeira, constituting both a symbol of international recognition and an endogenous resource with potential for the diversification of the tourist offer and for the economic enhancement of the territory (Silva, 2023).

Madeira Wine is produced exclusively in the Demarcated Region of Madeira, is distinguished by its organoleptic characteristics and specific winemaking and ageing techniques, developed over several centuries (Liddel, 2014; Pereira, 1989). Despite its international reputation, viticulture in Madeira has been in sharp decline. Currently, the vineyard area represents only a fraction of what existed in the mid-twentieth century, making this one of the smallest wine regions in Portugal (Pereira, 1989). This process raises significant concerns regarding the preservation of the agricultural landscape, intangible cultural heritage and territorial and tourist sustainability. The Madeira Region (RAM) represents 801.10 km of land surface and is in the North Atlantic Ocean (Regional Directorate of Statistics). According to the same source, the territory is an archipelago of eight islands, two of which — Madeira (736 km²) and Porto Santo (43 km²) — are inhabited. The rest include three islands called Desertas (14 km²) and three islands called Selvagens (4 km²).

Madeira has a heavy dependence on the tourism sector, supported by factors such as its strategic geographical location on the Atlantic, its mild climate throughout the year, stunning landscapes, and a rich cultural and gastronomic offer (Majdack et al., 2022). According to Madeira's "Tourism Satellite Account" (Regional Directorate of Statistics, 2019), tourism in Madeira contributes about 28.8% of the region's Gross Domestic Product (GDP), reflecting a greater importance than the national average in Portugal, which does not exceed 15.3%. Thus, the tourism sector represents one of the main pillars of the economy of the Autonomous Region of Madeira, acting as a driving force for economic development and job creation. There are studies that show that wine tourism is a relevant strategy to promote sustainability in island destinations, such as the Autonomous Region of Madeira, by diversifying the tourist offer, reducing seasonality and valuing endogenous resources (Getz & Brown, 2006). It also contributes to job creation, the settlement of the population in rural areas, the preservation of the landscape and the strengthening of cultural identity (Abreu et al., 2019; Crespi-Vallbona & Mascarilla-Miró, 2021).

In this sense, wine tourism emerges as a strategic solution to enhance the value of Madeira Wine, reinforce the attractiveness of the destination and create incentives to maintain the viticultural activity (Abreu et al., 2019; Breda et al., 2020). This perspective is aligned with regional tourism strategies and the Sustainable Development Goals, which recognize the role of intangible cultural heritage in promoting sustainable and inclusive development (Regional Government, 2021; Karampela et al., 2016). However, the current decline in viticulture, combined with tourist and demographic pressure, puts at risk the traditions of Madeira Wine and the sustainability of the destination (Pereira, 1989; Deller, 2010). Among the main current challenges are the aging of the agricultural population, the lack of attractiveness of viticulture for the younger generations, and the fragmentation of agricultural plots, which hinders mechanization and increases production costs (Pereira, 1989;

Abreu et al., 2019). Urban and tourist pressure, particularly intense on the south coast of the island, has contributed to the conversion of agricultural land into tourist and residential developments, a phenomenon already identified in the literature as one of the main risks to the sustainability of rural tourism (Deller, 2010; Connell & Page, 2006). This process compromises the continuity of the winemaking activity and the preservation of the cultural landscape that sustains the attractiveness of the Madeira destination.

The application to UNESCO's Intangible Cultural Heritage thus asserts itself as a strategic instrument for safeguarding, institutional mobilization and strengthening collective awareness around the practices, knowledge and values that structure this heritage. In conjunction with this dimension, the preservation of the intangible cultural heritage associated with Madeira Wine may create conditions for wine growers to benefit more directly from tourism activity and concrete incentives for the continuity of their agricultural practice. The unique characteristics of a heroic viticulture, deeply rooted in the territory and in the know-how passed down between generations, make the family farms of the Region particularly attractive to visitors, giving them a high degree of authenticity. In this context, linguistic proximity plays a central role, by facilitating communication between producers, tourists and markets, promoting a relationship of trust, knowledge sharing and cultural appreciation that favors more immersive tourist experiences. This proximity, combined with local entrepreneurship, can stimulate the development of innovative initiatives that reconcile grape production with tourist activities, such as interpretive visits, small-scale wine tourism or personalized cultural experiences. This combination would not only increase the profitability of wine activity, but also make it more attractive to new generations, reinforcing the economic, social and cultural sustainability of Madeira's wine-growing communities.

4. The Application Process of Madeira Wine Traditions to UNESCO's Intangible Cultural Heritage as an Instrument of Safeguarding and Territorial Mobilization (Ongoing)

4.1. Research Design and Methodological Approach

This research adopts a qualitative case study design, an approach considered particularly suitable for the in-depth investigation of contemporary social phenomena within their real-life context. The case study methodology is especially relevant when the boundaries between the phenomenon under analysis and the context in which it occurs are not clear, requiring the integration of multiple sources of evidence and different forms of empirical observation. In the present study, the case selected is the ongoing candidature of Madeira Wine Traditions to UNESCO's Representative List of the Intangible Cultural Heritage of Humanity. The choice of this case is justified by its strategic relevance for understanding the relationships between intangible cultural heritage, sustainable tourism, local entrepreneurship, linguistic proximity, and territorial sustainability in an island context. Madeira Wine Traditions constitute a complex socio-cultural phenomenon involving agricultural practices, technical knowledge, oral traditions, linguistic expressions, social rituals, economic activities, and community identity processes developed over several centuries. Simultaneously, the candidature process itself represents a unique opportunity to observe how different stakeholders mobilize around a shared heritage resource and how safeguarding initiatives may generate opportunities for tourism development and entrepreneurship.

The study follows an interpretivist perspective, seeking to understand the meanings attributed by different actors to Madeira Wine Traditions and to the safeguarding process associated with the UNESCO candidature. Rather than testing predetermined hypotheses, the research aims to explore perceptions, experiences, expectations, and forms of participation among stakeholders involved in the wine sector and in the candidature process. Although additional interviews were conducted with institutional representatives and experts during the preparation of the candidature dossier, the present article focuses exclusively on the perceptions of wine growers and wine-producing organizations, as these stakeholder groups are directly involved in the preservation and transmission of Madeira Wine Traditions.

4.2. Data Collection Procedures

The empirical material analyzed in this study was collected during the preparation of the candidature dossier and combines multiple qualitative sources of evidence. This strategy was adopted to ensure a comprehensive

understanding of the phenomenon under investigation and to strengthen the credibility of the findings through methodological triangulation. The first source of information consisted of documentary analysis. A systematic review was conducted of historical studies, legislative documents, official reports, UNESCO guidelines, institutional publications, archival records, press articles, academic literature, and technical documentation related to Madeira Wine and to the safeguarding of intangible cultural heritage. Documentary evidence was particularly important for reconstructing the historical evolution of Madeira Wine Traditions and identifying their cultural, social, and economic significance within the regional context. A second source of evidence resulted from extensive fieldwork carried out during the preparation of the candidature. The fieldwork involved direct observation of meetings, awareness-raising initiatives, public presentations, institutional contacts, and community engagement activities promoted by the Working Group responsible for the candidature. This participant observation component allowed the researchers to document interactions between stakeholders, understand decision-making processes, and identify emerging concerns regarding heritage preservation, tourism development, and community participation.

The third and most significant source of empirical data consisted of semi-structured interviews, that were conducted and recorded in audio format, with stakeholders representing segments of the Madeira Wine sector. Among all, for purpose of the present study the results of the interviews with 24 wine growers and 49 representatives of wine-producing companies will be presented and discussed. The interviewees were selected through purposive sampling. This sampling strategy was considered appropriate because the objective was not statistical representativeness but rather the inclusion of participants possessing relevant knowledge and experience regarding the phenomenon under study. Selection criteria included involvement in wine production activities, participation in safeguarding initiatives, institutional responsibilities related to culture or tourism, and recognized expertise concerning Madeira Wine Traditions. The sample included actors from different geographical areas of the island and different levels of involvement in the candidature process. This diversity contributed to the collection of a broad range of perspectives and reduced the risk of overrepresentation of interests or viewpoints.

4.3. Interview Structure and Data Recording

Semi-structured interviews were selected because they allow a balance between consistency and flexibility. While maintaining a common analytical framework across interviews, this format also enables the exploration of issues that emerge spontaneously during conversations and allows participants to express their views in their own terms. The interview protocol included questions organized around several thematic dimensions. These dimensions comprised the cultural significance of Madeira Wine Traditions, perceived threats to their continuity, safeguarding needs, relationships between heritage and local identity, opportunities for tourism development, entrepreneurial potential associated with wine tourism, community participation, and the expected impacts of UNESCO recognition. In addition, specific questions were included concerning the contribution of Madeira Wine Traditions to the achievement of the United Nations Sustainable Development Goals and regarding the criteria established by UNESCO for inscription on the Representative List of the Intangible Cultural Heritage of Humanity. Although a common interview structure was maintained, questions were adapted according to the profile of each participant. Wine growers were invited to discuss production practices, intergenerational knowledge transmission, and current challenges affecting viticulture. Representatives of wine companies were questioned about commercial perspectives, tourism opportunities, and safeguarding strategies. All interviews were recorded with the consent of participants and subsequently transcribed for analytical purposes. Detailed notes were also taken during and immediately after interviews to register contextual observations, non-verbal information, and preliminary analytical reflections.

4.4. Data Analysis and Coding Procedures

The empirical material was analyzed using thematic content analysis, following the procedures proposed by Braun and Clarke (2006). This analytical approach was selected because it provides a systematic framework for identifying, organizing, and interpreting patterns of meaning within qualitative data. The analysis was conducted



through several stages. Initially, all interview transcripts, documentary materials, and field notes were reviewed repeatedly to ensure familiarity with the data. During this phase, preliminary observations and analytical memos were produced. Subsequently, an initial coding process was undertaken. Coding combined deductive and inductive procedures. Deductive codes were derived from the theoretical framework developed in the literature review, particularly concepts related to intangible cultural heritage, sustainable tourism, entrepreneurship, linguistic proximity, territorial sustainability, and community participation. Inductive coding allowed the identification of themes that emerged directly from participants' narratives and were not anticipated by the theoretical framework.

The coded material was then organized into broader thematic categories. Through iterative comparison and refinement, recurring patterns were identified and grouped into higher-order analytical themes. The resulting thematic structure highlighted four major dimensions:

- Heritage safeguarding and cultural identity;
- Community participation and territorial mobilization;
- Tourism entrepreneurship and economic opportunities;
- Linguistic proximity and cultural transmission.

These themes emerged consistently across different categories of stakeholders and constitute the analytical framework underpinning the discussion presented in this article.

The coding process was conducted recursively, involving multiple rounds of review and refinement. Documentary evidence and observational data were continuously compared with interview findings to verify consistency and identify convergences and divergences between different sources.

4.5. Reliability, Validity and Trustworthiness

Several procedures were adopted to strengthen the reliability and trustworthiness of the research. First, methodological triangulation was achieved through the combination of documentary analysis, participant observation, and semi-structured interviews. The convergence of evidence from different sources enhanced the robustness of interpretations and reduced the risk of relying excessively on a single source of information. Second, data source triangulation was ensured through the inclusion of participants representing different sectors, institutional positions, and levels of involvement in Madeira Wine Traditions. This diversity contributed to a more comprehensive understanding of the phenomenon and allowed the identification of recurring patterns across stakeholder groups. Third, analytical triangulation was promoted through the continuous comparison between empirical findings and the theoretical concepts discussed in the literature review. This process facilitated the interpretation of results within broader debates concerning intangible cultural heritage, sustainable tourism, and entrepreneurship. Fourth, prolonged engagement in the field contributed significantly to contextual understanding. The preparation of the candidature involved sustained interaction with stakeholders over an extended period, allowing the researchers to gain familiarity with the social, cultural, and institutional dynamics surrounding Madeira Wine Traditions. Finally, all participants were informed of the objectives of the research and the candidature process before their participation. The study respected principles of voluntary participation, informed consent, transparency, and ethical management of qualitative data. Interviewees were informed that the information collected could be used both in the candidature dossier and in scientific publications related to the safeguarding of Madeira Wine Traditions.

4.6. Empirical Context of the UNESCO Candidature Process

Within the scope of the requirements required for possible inscription on the Representative List of the Intangible Cultural Heritage of Humanity, the Working Group responsible for the ongoing application, coordinated by an expert (A.J.M.S.), began the process with the preparation of a formal request for the inscription of the winemaking traditions of the Autonomous Region of Madeira in the National Inventory of Intangible Cultural Heritage (PCI).



5. Results and Discussion

5.1. Overview of the Empirical Findings

This section presents the empirical findings derived from the qualitative case study, focusing on the perceptions of stakeholders involved in the UNESCO application process for Madeira Wine Traditions. The data, collected through semi-structured interviews with 49 management positions across all eight Madeira wine-producing organizations, illuminate how the theoretical principles of intangible cultural heritage (ICH), local entrepreneurship, and sustainable tourism materialize in this specific insular context. The analysis is structured around key themes identified from the interviews, providing a comprehensive understanding of the initiative's perceived impacts and challenges. Additionally, the analysis of 24 semi-structured interviews with wine growers across various localities in Madeira Island, including Câmara de Lobos, Calheta, Santana, São Vicente, and Funchal will be also presented. These testimonials, collected during the 2024 harvest, provide a grassroots perspective on the UNESCO application process and the socio-economic reality of the wine sector.

5.2. Perceptions of Madeira Wine-Producing Organizations

The analysis of interviews of Madeira wine-producing organizations revealed a strong consensus regarding the strategic importance of UNESCO recognition for Madeira Wine Traditions. The perceptions gathered align with the overarching goal of leveraging ICH for sustainable development, as discussed in the theoretical framework. The following table summarizes the main themes, principal evidence, the number of interviewees who referenced each theme, and illustrative literal quotes.

Table 1: Perceptions of Madeira wine-producing organizations.

| Theme | Main Evidence | No. of interviewees who mentioned the theme | Quotes |
|---------------------------------|--|---|---|
| Heritage Safeguarding | Preservation of viticultural knowledge and practices | 49 (100%) | <i>"I think that this application can bring transmission to people of what is still possible to do in Madeira wine. Or even recover history. We have a long history. (...) and if we look at it, the practices, that is, the difficulties in working the vineyards today, are not that different from what they were 200 and 300 years ago. This is true. And this is something that I think people usually call heroic viticulture"</i> (Ricardo de Freitas - administrator/ general manager and winemaker of Vinhos Barbeito company). <i>"I think that the application is undoubtedly one of the most important tools for making people truly aware of the value of wine and creating a cultural and emotional bond with it"</i> (Francisco de Albuquerque – production manager and winemaker of Madeira Wine Company). <i>"It's not just alcoholic beverage, it's all history that will still come with the wine (...) there are several centuries of history that, if we don't value, in the future we will only value the past"</i> (Melissa de Castro – commercial and tourism manager of H. M. Borges company). |
| Community Mobilization | Participation of associations and institutions | 25 (50%) | <i>"There must be a working team, both between the various wine producers and with the Regional Government, so that we can work together in a concerted effort for the good of farmers and also Madeira wine"</i> (Susana Pedro – financial manager of Funchal Agrarian Cooperative – brand Madeira Vintners). <i>"And I think this is a lesson for all of us, for us, for those who live here to really know and realize this and not forget something that was unique"</i> (Gabriela Afonso – commercial manager of Funchal Agrarian Cooperative – brand Madeira Vintners). |
| Tourism Entrepreneurship | New wine tourism experiences | 37 (75%) | <i>"This application not only honors the past, but it's a strategic path to build the future of wine and tourism in the region"</i> (Mariana Pinto – commercial and marketing manager of Vinhos Barbeito company). <i>"Madeira wine is regaining the status it had in the past... But it is possible to create this new attention, and, for that, it is necessary to have vineyards, because vineyards really beautify our landscape. Coexistence is</i> |



| | | | |
|-----------------------------|--|----------|---|
| | | | <i>possible" (Juan Teixeira – administrator/ general manager, production and tourism manager of Justino's company).</i> |
| Linguistic Proximity | Communication with visitors and diaspora | 43 (88%) | <i>"In my reality, they [foreigners] know Madeira wine better than we Madeirans, we are Portuguese. It's a fact" (Graça Gouveia – commercial manager of Henriques & Henriques company). "I think it will only benefit... extend our entire history for the next generations in the four corners of the world" (Ana Soares – Lodges Museum and guides manager of Madeira wine Company). "It is also important because of our interpreters, of the whole process involved, and it is good to give knowledge of the whole process that is done" (André Miranda - production manager and winemaker of Henriques & Henriques company).</i> |

Source: Own Elaboration.

5.2.1. Heritage Safeguarding

The theme of Heritage Safeguarding emerged as a paramount concern, with all 49 interviewees (100%) emphasizing the importance of preserving traditional viticultural knowledge and practices. This finding strongly resonates with Lenzerini's (2011) perspective on ICH as a living culture, inseparable from sustainable development. The concept of "heroic viticulture," as articulated by Ricardo de Freitas, highlights the arduous yet culturally significant methods of wine production in Madeira, underscoring a deep-seated desire to transmit this historical legacy to future generations. Francisco de Albuquerque's quote further reinforces the role of the UNESCO application as a tool to foster awareness and an emotional bond with the wine's value, aligning with the idea of ICH as a differentiating resource that contributes to authenticity (UNESCO, 2003; Timothy, 2020). Melissa de Castro's statement about valuing centuries of history to avoid losing the past encapsulates the urgency felt by stakeholders to protect this heritage from potential erosion.

5.2.2. Community Mobilization

Community Mobilization was identified as a crucial aspect, with 50% of interviewees (approximately 25 individuals) highlighting the participation of associations and institutions, and 75% emphasizing local pride. Susana Pedro's call for a "working team" between wine producers and the Regional Government for the "good of farmers and also Madeira wine" illustrates the perceived need for collaborative governance and stakeholder engagement, echoing the participatory management models discussed by Kim et al. (2019). Gabriela Afonso's reflection on the initiative being a "lesson for all of us, for us, for those who live here to really know and realize this and not forget something that was unique" points to the internal mobilization and reinforcement of local identity that the UNESCO application process can engender. This aligns with the article's premise that ICH enhancement, when articulated with participatory models, strengthens the cultural and economic capacities of communities.

5.2.3. Tourism Entrepreneurship

Regarding Tourism Entrepreneurship, 75% of interviewees (approximately 37 individuals) saw the UNESCO application to foster new wine tourism experiences and improve tourism quality. Mariana Pinto's assertion that the application is a "strategic path to build the future of wine and tourism in the region" directly supports the article's argument that ICH can be mobilized as a strategic resource for sustainable tourism development and local entrepreneurship. The existing context of "visits to wine cellars, wine tastings, and festivals dedicated to viticulture" already being valuable tourist experiences, as mentioned in Section 2 of the original article, provides

a foundation upon which new entrepreneurial initiatives can be built. Juan Teixeira's perspective on Madeira wine "regaining the status it had in the past" through new attention and the necessity of vineyards to "beautify our landscape" suggests a vision for integrated tourism development that values both the product and its cultural landscape, contributing to the diversification of the tourist offer beyond conventional products (Richards, 2018; Timothy, 2020).

5.2.4. Linguistic Proximity

Linguistic Proximity emerged as a significant facilitating factor, with 88% of interviewees (approximately 43 individuals) recognizing its role in communication with visitors and the diaspora. Graça Gouveia's candid observation that "foreigners know Madeira wine better than we Madeirans, we Portuguese" underscores the global reach and recognition of Madeira wine, and implicitly, the importance of effective communication with international audiences. Ana Soares's vision of extending "our entire history for the next generations in the four corners of the world" highlights the potential of linguistic connections to reach the Madeiran diaspora and broader Portuguese-speaking communities, fostering a sense of shared heritage and promoting the wine globally. André Miranda's emphasis on the role of "interpreters" and the importance of conveying "knowledge of the whole process that is done" further illustrates how linguistic proximity facilitates cultural interpretation and the construction of authentic territorial narratives, which are crucial for sustaining entrepreneurial projects based on wine and culture, as discussed by Esperança (2010) and Santos (2019).

An important distinction emerged between linguistic proximity and cultural identity. While cultural identity refers to the collective sense of belonging associated with Madeira Wine Traditions, including shared memories, values, practices and historical experiences, linguistic proximity operates as a mechanism that facilitates the transmission, interpretation and communication of that identity. The interviews suggest that language contributes to preserving specialized viticultural knowledge, conveying cultural meanings to visitors and strengthening connections with the Madeiran diaspora and Portuguese-speaking markets. In this sense, linguistic proximity should not be understood as a component of cultural identity itself, but rather as a facilitating factor that supports the safeguarding, dissemination and valorization of intangible cultural heritage.

5.3. Wine Growers Perceptions and UNESCO Recognition

This section presents the findings from the content analysis of interviews conducted with 24 viticulturists in Madeira, focusing on the four primary themes: Heritage Safeguarding, Community Mobilization, Tourism Entrepreneurship, and Linguistic Proximity. The analysis aims to identify patterns, challenges, and perspectives among the viticulturists, providing a foundation for discussing the sustainability and future of viticulture in the region. Table 2 summarizes the main themes identified in the interviews, the primary evidence, the percentage of interviewees who mentioned each theme, and representative quotes.



Table 2: Perceptions of the wine growers.

| Theme | Main Evidence | No. of interviewees who mentioned the theme (%) | Quotes |
|--------------------------|---------------------------------|---|---|
| Heritage safeguarding | Mentioned by 12 viticulturists. | 50.0% | "We are preparing a candidacy to inscribe Madeira Wine on the List of Intangible Cultural Heritage of Humanity." Several interviewees support the candidacy of Madeira Wine for Intangible Cultural Heritage of Humanity and mention the importance of preserving traditional savoir-faire. |
| Community mobilisation | Mentioned by 13 viticulturists. | 54.2% | "They help each other out!" Mutual aid among family members, friends, and neighbours is crucial to mitigating labour shortages... |
| Tourism entrepreneurship | Mentioned by 10 viticulturists. | 41.7% | Pressure from tourism and the construction industry leads to the abandonment of vineyards and their replacement with more profitable crops such as bananas. "The banana tree, once confined to the seaside, now debuts at altitudes where it was never seen before..." |
| Linguistic Proximity | Mentioned by 13 viticulturists. | 54.2% | "espolda... pruning, tying." Specific terms like 'mangra' (powdery mildew) or 'espolda' (pruning) demonstrate the richness of the technical lexicon and generational nuances... |

Source: Own Elaboration.

5.3.1. Heritage Safeguarding

Approximately half of the interviewed viticulturists (50.0%) expressed support for the candidacy of Madeira Wine for Intangible Cultural Heritage of Humanity. This data highlights the awareness and value that producers place on preserving traditions and the savoir-faire associated with viticulture in the region. The quotes reveal that the candidacy is seen as an opportunity to raise awareness about the hard work and culture behind Madeira Wine, which is often unknown to the final consumer. The valuation of intangible heritage can thus serve as an incentive for younger generations, although its effectiveness in reversing the abandonment of the activity is questioned by some interviewees.

5.3.2. Community Mobilization

Community mobilization is a fundamental pillar for the sustainability of viticulture in Madeira, with 54.2% of interviewees mentioning the importance of mutual aid. Labour shortages are a significant challenge, and solidarity among family members, friends, and neighbors is crucial for performing tasks such as the harvest. This practice of "helping each other out" demonstrates the resilience and social cohesion of viticultural communities, where collective work compensates for the lack of human and financial resources. However, reliance on this informal mobilization raises questions about its long-term sustainability, especially in the face of an ageing population and declining interest from younger generations.

5.3.3. Tourism Entrepreneurship

The theme of tourism entrepreneurship and its influence on viticulture was mentioned by 41.7% of the viticulturists. The interviews reveal a tension between tourism growth and the maintenance of viticultural activity. Real estate pressure and the expansion of more profitable crops, such as the banana tree, lead to the abandonment of vineyards, particularly on more accessible land. While tourism is an economic driver for the region, its uncontrolled expansion could threaten the cultural landscape and the very existence of traditional viticulture. The need to find a balance between tourism development and the preservation of agricultural activity is a pressing challenge.

5.3.4. Linguistic Proximity

Linguistic proximity, manifested through the technical lexicon and expressions used by the viticulturists, was a relevant theme for 54.2% of the interviewees. The use of specific terms such as "mangra" (powdery mildew) or "espolda" (pruning) reflects the cultural richness and historical depth of Madeiran viticulture. Generational differences in terminology are also notable, with older practitioners employing traditional terms and younger ones adopting more technical language. This linguistic richness is an indicator of cultural identity and knowledge transmitted from generation to generation, but it also points to the need to document and preserve this lexicon before it is lost with the decline of the activity and the ageing of its practitioners. In summary, the analysis of the interviews reveals a resilient viticultural community, deeply connected to its traditions and mutual aid, but facing significant challenges related to labour shortages, pressure from tourism development, and the need for generational renewal. The candidacy for Intangible Cultural Heritage of Humanity is seen as an opportunity to value and protect this heritage, but its effectiveness will depend on support policies that ensure the economic and social viability of viticulture in Madeira. The findings indicate that cultural identity and linguistic proximity perform complementary but analytically distinct functions within the safeguarding of Madeira Wine Traditions. Whereas cultural identity provides the symbolic foundation that gives meaning to the heritage, linguistic proximity facilitates its transmission across generations, communities and tourism markets, thereby enhancing its potential contribution to sustainable tourism and heritage-based entrepreneurship.

6. Conclusion

This article examined how intangible cultural heritage (ICH) can function as a strategic resource for sustainable tourism development and local entrepreneurship in island territories, using the ongoing UNESCO candidature of Madeira Wine Traditions as a qualitative case study. Building upon the literature on heritage tourism, cultural entrepreneurship, linguistic proximity, and destination sustainability, the study sought to understand how heritage safeguarding processes may simultaneously reinforce cultural identity, stimulate community participation, and create opportunities for economic diversification. The empirical findings confirm that Madeira Wine Traditions constitute far more than a productive activity or a commercial asset; they represent a living cultural system integrating agricultural knowledge, technical practices, oral traditions, and social rituals transmitted across generations. The data collected from both wine-producing organizations and wine growers reveal a strong consensus on the strategic importance of UNESCO recognition. While organizations focus on the global positioning and the "heroic" nature of viticulture, wine growers highlight the critical role of community mobilization and mutual aid (mentioned by 54.2% of growers) as essential pillars for overcoming labour shortages and ensuring the sustainability of the sector.

Furthermore, the study underscores the role of linguistic proximity as a facilitating factor for cultural interpretation and territorial narratives. The specific lexicon shared by viticulturists, such as "mangra" or "espolda", serves as a marker of identity and a tool for authentic communication with visitors and the diaspora. However, the analysis also exposes significant challenges, particularly the tension between tourism expansion and the maintenance of traditional vineyards. The pressure from more profitable crops like bananas and the real estate sector (noted by 41.7% of growers) poses a real threat to the cultural landscape. From a policy perspective, the results reinforce the need for integrated strategies that connect heritage safeguarding with tourism planning and entrepreneurship support. Public policies must recognize ICH not only as a cultural asset but as a driver of

innovation and community resilience. Strengthening the economic viability of small-scale viticulture through wine tourism and heritage valorization is essential to ensure that the "Madeira Wine Traditions" remain a living heritage rather than a museum piece.

Despite the depth of the qualitative analysis, this study is subject to certain limitations. As a case study focused specifically on the island of Madeira during an active UNESCO application process, the findings reflect a unique socio-political and geographical context that may not be directly generalizable to other wine-producing regions or non-insular territories. Furthermore, the qualitative nature of the interviews provides rich subjective insights but lacks the longitudinal data necessary to measure the long-term socio-economic impacts of heritage recognition after its eventual implementation. In conclusion, the valorization of intangible cultural heritage, when combined with community participation and entrepreneurial initiatives, contributes significantly to the sustainability of tourism destinations. The case of Madeira Wine Traditions illustrates how heritage safeguarding can evolve beyond preservation objectives to become a dynamic instrument for cultural continuity and sustainable development in island regions.

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Ethical Statement

Conflict of Interest: Nothing to declare.

Contributions:

- Conceptualization: Rossana dos Santos
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- Validation: Rossana dos Santos; António Silva; Naidea Nunes
- Formal analysis: Rossana dos Santos
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- Project administration: António Silva
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Funding: This work was funded by CITUR Madeira.

Peer Review: Double-blind.



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