



LESSONS LEARNT BY THE BIODIVERSITY & WINE INITIATIVE DURING THE 2004-2006 PILOT PHASE

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Project Design Process: (aspects of the project design that contributed to its success/failure)

Understanding the industry

- Conservation and the private sector must work together to conserve biodiversity and realise sustainability goals.
- Mutually beneficial relationships are essential – but too few successful examples exist of how the partnership can benefit both sectors.
- Industry engagement is the key to getting individual businesses and landowners involved as the industry usually drives the brand image, sets the standards and provides support to the individual businesses. Industry has the leverage and communication tools to change behaviour. Through the BWI, engaging the industry gave access to 4500 growers, 500 private cellars and 70 co-ops.
- Substantial research into the industry is required prior to engagement, covering aspects such as core business, market leaders, key markets, marketing strategy, approach towards sustainable production, missed opportunities etc.
- Collaborate transparently on a strategy with the main industry players from conceptualization to implementation and avoid coming in with a top down approach.
- Be very aware of internal industry politics and carefully maneuver around it. Wine industry politics had a huge influence on the project through certain individuals or their organizations either supporting BWI or not.
- Know how far you can push issues before making enemies of the industry. Be flexible and reasonable to negotiate trade-offs, don't come in with a "crusader" or activist approach. Keep them on your side and not against you - try maintain an "ally" image to all sectors of the industry so that they you're your role as one of assisting them achieve environmental excellence and not there to be whistle blowers.
- If the industry is not cohesive, work with the market leaders in the industry. It is often useful to play off the leaders against each other as sustainable production systems can be a useful tool to acquire market share.
- Spend time with the leader of each wine industry institution, even if you don't work with them closely on a day-to-day basis in order to obtain their endorsement for the project (e.g. WineCellars SA, Vinpro, Rudnet).

Engagement strategy and catalysts

- Short-term economic incentives are needed to engage the private sector. These must be supported by long-term sustainability benefits. For landowners to engage in such schemes, the conservation sector, private sector and government (agriculture, conservation and finance) need to work together to develop market mechanisms, tools and tax incentives for landowners. Engage at ministerial level for incentives.
- Work through existing industry structures to promote the uptake and acceptance of a conservation initiative. It also saves money, time and is more likely to be supported by industry (e.g. BWI chose to mainstream biodiversity into an existing environmental sustainability accreditation scheme called IPW, and didn't try to establish an entirely new biodiversity/environmental accreditation system). Don't re-invent the wheel or create more structures unnecessarily.



- Promote the work of the existing organizations/structures during presentations of your project to demonstrate a willingness to work alongside, and not against these structures.
- The conservation sector is short on the business, marketing and social skills required to design and implement such initiatives. Recruitment and mentoring programmes are required. A team with complimentary skills is required for effective engagement.

Project sustainability

- Secure a MINIMUM of 2 years of pilot phase funding – accept that the conservation sector must lead the initial phase.
- Acquire written consent that, if the initiative meets its objectives, the industry will cover the costs of the initiative once the pilot phase is complete. BWI had gentleman's agreements in place relying on good intentions, which didn't hold weight when it came to the crunch.
- At least 1 month should be set-aside by the project executant after the CEPF project delivery time frame has ended where he/she can be based out of the office without normal job responsibilities, just to be able to uninterruptedly write up lessons learnt, final project reports and document much of the institutional memory that was developed.

Project funding

- Avoid having different start and end dates from multiple funders. This is not always avoidable but makes financial reporting very challenging, as was experienced by BWI.
- The major donor funding from CEPF was given to SAWB instead of the Botanical Society in the hope that by taking financial responsibility for the project, this would assist with mainstreaming the project into the industry after the pilot phase terminated. This however happen this way and so financial responsibility has moved back to BotSoc for phase 2.

Project Execution: (aspects of the project execution that contributed to its success/failure)

Regulatory environment

- Synthesize respective environmental and agricultural laws into an understandable format and show producers that the guidelines are a useful tool for them to achieve compliance.
- Bring together the different regulatory departments around one table to improve efficiency of law enforcement and bring to their attention incompatibilities between the different laws.
- Look for gaps in credibility on regulatory mechanisms (e.g. lack of IPW suspensions) and offer solutions to these limitations.

Biodiversity conservation tools

- **Easing compliance** – i.e. make requirements easy to accomplish by developing templates, information databases, guidelines to completion of forms etc.
- **Conservation management plans** in the past have traditionally been lengthy, theoretical, and not a real management tool for the land manager to guide daily management actions. Therefore BWI compiled a suggested structure/template for consultants and landowners to use in drawing up their own plan, which is concise and user friendly.

Project implementation

- **Partners** – Ensure you have a wide mixture of partner organizations such as NGO's, academics, government, communities & business. Maintain partner interest in the project and seek ways of securing tangible commitment and involvement in the initiative, so that they don't become "silent" partners. To some extent, this was the case within BWI and needs to be rectified in phase 2.



- Implement the conservation strategy prior to releasing the marketing strategy to maintain credibility for the initiative. Furthermore, ensure that whenever the marketing aspects of the initiative are told, that the project's credibility is maintained by explaining that any recognition a producer receives is based on their fulfillment of a number of stringent criteria which are approved by a review committee.

Pilot phase institutional home (SA Wine Industry Council)

- **Strategic office space** – Project implementers should ideally be based in the head-office of the main industry body (such as SAWIC) or a market leader that is well known by most wine producers. This is one of the most effective means for mainstreaming conservation awareness & the project into the fabric of the industry, and avoids the external “green body” image that is not always helpful within an industry. The project becomes visible to the many committees and groups that come in and out of the office (especially if you have posters & banners on the wall with project branding), and there is opportunity to meet many interesting industry role-players who come to the offices for other meetings.
- **Restructuring process** – the uncertainty that was created over about 6-8 months by the restructuring process of SAWIC in 2006 put BWI's future institutional plans on ice as we waited to hear the final outcome. This time delay was detrimental as we were expecting SAWIC to take on BWI's funding needs from 2007. However this has not happened and so fundraising attempts have had to take place in a desperate rush at the last minute.

Institutional home for Phase 2

The process for securing a new institutional home has been arduous and very frustrating, as we have been shifted from pillar to post as institutions tried to brush us off to another institution. The situation would change almost daily, particularly as the position of the SAWIC CEO on how we should proceed or where we should “belong” would regularly change. With no road maps to guide us, path finding was at times like groping around in the dark!

Communication & public relations

- **Project ambassadors** - Identify and approach high profile people to be ambassadors of your initiative (e.g. Valli Moosa). These people will promote your initiative very effectively within your target audience due to the kudos they have. Valli Moosa provided valuable public endorsement of BWI when he spoke at the launch of the first BWI champion.
- **Champions as BWI mouthpieces** - Enlist high profile corporates as champions (e.g. Vergelegen), and using their leverage, jointly communicate the message of the initiative to the industry and general public.
- **Media** - Use all media avenues for creating greater exposure for individual producers (e.g. newspaper & magazine articles, radio interviews). This form of recognition and motivational incentive is one of the most effective means of generating landowner interest.
- **Wine Industry publications** - Use the most widely read industry publication (e.g. *Wineland* magazine), not the consumer publication (e.g. *Wine* magazine) for creating awareness about the project within the industry. Regular BWI articles within the technical section of *Wineland* magazine proved to be one of the most effective ways of generating producer interest as the vast majority of wine farmers read this monthly magazine. A number of producers phoned BWI after reading an article about the initiative.



- **BWI website** - Having a well maintained and regularly updated project website is of huge benefit. It is well worth spending the money on getting a professional to update it promptly. Interested producers can then be referred to the website and by the time an extension officer visits them, they can already have a good idea what BWI is about & the member requirements. However, once again do not assume that all landowners are computer literate or even have internet facilities.
- **BWI newsletter** – first newsletter was developed fairly late into the project (September 06). So far it seems to be a successful way of keeping our members & other stakeholders informed with the latest developments in the project. In retrospect newsletters should have been produced earlier in the project. Because newsletters are time-consuming to produce, 3 newsletters a year is sufficient. The BWI newsletter should go out even wider than its current circulation and more communication avenues need to be explored. The newsletter should possibly be converted from a PDF file into an e-newsletter that opens within an email as not everyone goes to the trouble of opening a PDF attachment.
- **BWI displays at expos & wine shows** – these types of displays have been exceptionally time-consuming to prepare and erect. It was done twice in 2006 for the CAPE Business & Biodiversity Conference and the GEF assembly in Cape Town. For the amount of time, effort and expense spent in preparing new display material and manning the stand, the amount of new interest in the project does not warrant the investment.
- **BWI presentations** – There have been many opportunities to give BWI presentations to a range of audiences such as industry groups, landowners, media and the general public. It is advised that the content and style of the presentation should be adapted according to the biodiversity knowledge level of the audience. Use a fun quiz at the end of a talk based on BWI facts to give away wine prizes – this makes the audience prick up their ears to listen very attentively and is a good icebreaker in the beginning when explaining the rules of the “quiz”.
- **Communication with members & champions** – An email distribution list has been set up to be able to email members regularly with news, info requests etc. Generally a poor response is obtained to the emails. Sometimes nobody replies or just a handful out of the >70 producers. So for anything really urgent, send more than 1 email reminder, be persistent and resorting to phoning producers individually if necessary.

Marketing

- **Wines of South Africa (WOSA) support** – Without WOSA making the brave decision to use biodiversity as the new unique selling point for Brand SA it is unlikely that the word “biodiversity” would have become a buzzword in the industry as quickly as it did. The BWI owes much to WOSA and we have worked very well together. It is vital to get an industry marketing body on board as they are in a far better position to market biodiversity than the conservation sector as they are better resourced and equipped and will have a further reaching impact.
- **Lay-mans language** – The conservation sector is generally not good at marketing our natural assets to the general public and people within the industry. For example, the magnificence of the Cape Floral Kingdom is often only properly appreciated by those in scientific or conservation areanas. Use lay-mans terms and clever slogans to get biodiversity vocabulary into the public arena & popular media. CAPE have done a good job with popularizing fynbos with their series of bumper stickers such as “Fynbos fynmense” and “Fab fynbos”.



- **Using BWI member/champion status effectively** – Once producers have received BWI status, not many have gone on to use their status and the unique biodiversity on the farm in their own marketing & promotional material. Thus far, 2 members (Waterkloof & Oak Valley Wines) have incorporated BWI text and the BWI website into the text on their back label and 2 members (Waverley Hills Organic Wine and Delheim) have incorporated something on their cork. Of the 70 members currently on board, only about 3 have included anything about their BWI status on their own website. A number of complaints were received by producers who wanted to incorporate the BWI cork logo onto their label, but found the design and colour of the cork not suitable for reduction to a small print size. Many others asked for a BWI sticker they could display on a wine bottle as an identifier, which was supported by many consumer requests as well. This is what prompted the development of a special BWI sticker.
- **Consumer marketing** – in the pilot phase, efforts to market BWI wines to consumers was fairly limited due to the need to concentrate on building up sufficient numbers of members and champions. In the next phase, there is now opportunity to really target environmentally conscious consumers with creative marketing strategies that play on ethical purchasing. The sticker being developed for wine bottles will be the first step in actively advancing consumer awareness and building a brand for “nature friendly” wine. “BWI” as an acronym is not known well enough to be dominant on the stickers, which is why the “nature friendly” wording will be most prominent.
- **Exposure as an incentive** – for many producers, the efforts that BWI have gone to, to generate exposure for members & champions through magazine & newspaper articles, press releases, wine displays and special tasting opportunities has been a satisfactory incentive to enlist as members. Producers featured in articles published in *Winelands*, *Africa Geographic* & *Skyways* were especially pleased.
- **TV coverage** – BWI went to great lengths to get the national environmental TV programme called “50/50” to film a BWI story. This took a lot of organizing and tricky negotiating around which farms were to be used for filming. Eventually a 5-minute insert was produced and the content and factual accuracy was excellent. However, to our surprise the response to this insert was dismal. This is possibly because few wine producers watch the programme or else many people did see it but didn’t choose to contact BWI afterwards. The insert did possibly lack a marketing drive aimed at persuading a consumer to support “nature-friendly” BWI wines. Even after emailing a downloadable version of the insert to all our members, not one single member replied with praise or criticism.

Priority Areas & consultants

- **Pilot area strategy** – Initially 4 well-defined pilot areas were chosen but we were not able to stick to these as it was most important in the first year to build up a core of members & generate momentum. During the early stage we could not afford to be exclusive and so we responded to producer interest in any wine region.
- **Consultants** – Expecting to not be able to cope with increasing consumer interest in 2006, we trained a group of consultants in Feb 2006 so that they could do farm visits, prepare the documentation and process member or champion applications. Since Feb, only 1 member application has been received from a consultant. This is possibly because producers are put off when a BWI staff person can’t visit them for free and a consultant’s time must be paid instead. It seems that these producers do not want the BWI status badly enough to warrant that level of investment. In retrospect the amount of new interest was just adequate to be handled by the BWI staff. It is also actually better if BWI staff visit all the farms and are aware of what is on the property, or else we cannot promote or market them as well as other farms that we have spent time on.



Project Co-ordination

- **Skills required** - Being project co-ordinator for any initiative such as this, requires one to be a jack-of-all-trades. Good written & verbal communication skills is one of the most needed skills for this role, backed up by a accurate understanding of biodiversity issues & the conservation sector in that province. Within the wine industry, it is a huge advantage if you can speak and write in Afrikaans, seeing as the wine industry is still predominantly Afrikaans speaking. If English-speaking, make at least an effort to begin a presentation in Afrikaans before switching over to English, or at least try speaking Afrikaans in casual conversation if not confident for public speaking. If addressing an Afrikaans audience in English, it is advisable to translate text on the power-point slides into Afrikaans.
- **Technical Working Group** – this group was useful in the beginning for getting different industry stakeholders around the table and while the biodiversity guidelines were being developed and refined. However the working group was no longer needed once the guidelines were developed and the project strategy finalised.
- **Steering Committee** – This was useful for keeping key industry leaders & other stakeholders informed and feeling a sense of “ownership” towards decisions made in the project. In reality, the committee meets too infrequently (approx. every 4 months) to be a real form of day-to-day governance, so it performs more of a “sounding board” function and source of new ideas or perspectives for the project staff.
- **Project hand-over** – Handing over to a new project co-ordinator is a time-consuming process, and as much time should be created as is possible to get the new person up to speed, to avoid delays in project delivery once they are appointed. It is normal however, to allow a new person about 3 months to properly find their feet and build up sufficient confidence in the project before placing large expectations on them.
- **Team work** – The BWI has consisted of a small team of 3 people (1 co-ordinator & 1 extension officer and 1 project supervisor within the Botanical Society) since its inception. It has been useful to brainstorm many things together even though the division of responsibilities is clear.
- **Be strategic** – There have been numerous requests and approaches from other projects & organizations to involve BWI (especially asking for wine donations for special functions). Be strategic about where BWI involvement will be beneficial for the project, before saying yes to all requests.

Working with the Integrated Production of Wine (IPW) Scheme

Advantages

- Including our biodiversity guidelines & evaluation form into the IPW guidelines has enabled their content to reach 90% of the 5,000 producers that are registered with IPW and introduce concepts such as threatened ecosystems and stewardship to wine producers.
- In many cases mentioning the close collaboration between IPW and BWI has given us better acceptance by producers, seeing as IPW is a well-known entity, established in 1998.
- BWI has more chance of becoming a permanent part of the wine industry if it becomes part of IPW, due to their well-established foundations within the Wine & Spirit Board and their “user pay” funding mechanism.

Disadvantages



- There are limitations to the credibility of IPW because it is still largely a self-evaluation system with spot audits. This lack of credibility could then be projected onto BWI. Furthermore, there are some producers who are very negative about IPW, which makes it difficult to bring those producers on board seeing as BWI membership requires IPW certification as a very minimum. The BWI extension officer then first has to sell IPW to them and get them through that registration process which can be lengthy.
- Setting IPW Conformance Certificates as one of the requirements for obtaining champion status has also caused lengthy delays because it is not easy to be fully compliant with all legislation and a DWAF general authorization must also be in place (which in itself can take months, even years to obtain). For this reason we only managed to get 4 champions on board in 2 years (although this does keep the champion status still elite and valuable which is good).
- The IPW governance system is embedded in bureaucracy and so many of the decisions made within IPW or in association with IPW have followed a rather tortuous path. There is a risk that the flexibility and high productive nature of BWI, which has been NGO in nature, will be slowed down and institutionalized by IPW if the decision-making processes are not simplified.

Working with other project partners

- **LandCare (Provincial Dept of Agriculture)** – This partnership has been very useful but it is optimistic to expect the LandCare extension officers to help farmers implement our biodiversity guidelines. When this was discussed they felt they are not experts in the biodiversity field and would therefore prefer to refer interested landowners to us than passing on BWI information secondhand. There exists more opportunity for closer collaboration in the future.
- **CapeNature** – Generally the relationship with CapeNature has remained good over the last 2 yrs. It has been useful for CapeNature and BWI extension officer to visit farms together where there is a stewardship potential for the property, so as not to confuse landowner. BWI continues to refer to CapeNature' scientific services for queries on certain issues. In many cases CapeNature officials have referred wine farmers to BWI staff.
- **Green Trust, WWF & Nedbank** – These funders have had quite a few funders requirements of BWI in terms of showcasing our work within Nedbank and WWF, but this has been very understandable. Much discussion was had at the Green Trust Executants workshop in April 2006 about marketing the Green Trust funded projects better through Nedbank & educating Nedbank staff in what work the Green Trust sponsors. However, not much has come of these suggestions. Many mutual advantages still exist and the BWI looks forward to a continued close funding relationship with the Green Trust.

Extension work

- **Approaching landowners** - Make the industry's support for the initiative one of the first things mentioned to a landowner – this facilitates greater individual acceptance for your conservation message, so that they don't view you suspiciously as a "greenie" who could cause trouble for them.
- **Collaborate with extension officers of other programmes** - When starting with extension work in a new area, make contact with the other extension officers first (e.g. LandCare or Stewardship) and accompany them on some site visits to be introduced by them to landowner if they have good report with the landowner.
- **Explaining project governance & funding** - One of the most frequently asked questions is: "Who funds your project?" and "Who do you work for?" which is not always easy to answer when it is a partnership initiative with multiple funders. So prepare a simplified, easy-to-understand answer.



- **Nothing can replace one on one visits!** – Only responsible landowners usually attend workshops and public meetings, so farm visits are the only way of reaching the others.
- **Governmental department capacity** – Lack of capacity in government departments negatively affects projects such as BWI, and makes the need for extension work by an NGO grouping all the more needed.
- **Express enthusiasm** in the natural area belonging to a landowner, which will encourage them to value their habitats more.
- **Correct misperceptions upfront** – If there are commonly held misperceptions, deal with these early in the conversation. e.g. BWI is not here to take away your landowner rights or stop wine production.

Member & champion recruitment

- **Membership fee** – The cost of becoming a member must be kept as low as possible. It seems most members are willing to pay a reasonable fee and have been surprised that they haven't had to pay anything up till now. Scope therefore exists to regain some of the projects running costs through membership fees.
- **Learning through doing** - although we advise champion and co-ops to make use of consultants to prepare their applications, they should still be given an opportunity to put it together themselves. This is actually better in the long run for educating landowners in biodiversity management issues, and is more likely to ensure that the recommendations in the document are implemented. Besides the high cost that consultants normally charge, consultants can sometimes just create impressive documents that do not change much on the ground.
- **Certificates & awards functions** - Presenting a member or champion with a certificate at an awards function has proved a successful way of rewarding a landowner and providing them recognition and a tangible benefit to being involved. The biodiversity highlights and achievements of each member are read out as each certificate is awarded. It was noticeable how landowner pride in their membership status increased as did a general enthusiasm for biodiversity on their farm, after receiving their certificates and being singled out at the event. Press coverage after the 2 member awards held so far has been encouraging.

Biodiversity tourism

So much potential exists for developing ecotourism products and facilities on the farms of the BWI members and champions due to the unique biodiversity and beautiful scenery on many of the farms, yet very little has been tapped. Only 1 member, namely Mooiplaas, has developed an ecotourism product since being involved in BWI, which consisted of a hiking route through their conservation area. More facilitation is needed to encourage and unlock ecotourism development within the wine industry.

Biodiversity wine routes – One biodiversity wine route has been established to date, namely the Green Mountain Eco Route (www.greenmountain.co.za). BWI expected other areas to follow suite and more routes to be developed, but this has not been the case. Perhaps interested people are looking to Green Mountain to see if it will be a success.