



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 and the potential for partnerships

- 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 i.e. demonstrating 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. In BWI, industry engagement gave access to 4500 growers, 500 private cellars and 70 co-ops.
- Substantial research into the industry is required prior to engagement i.e. core business, market leaders, key markets, marketing strategy, approach towards sustainable production, missed opportunities, etc.
- Don't come in with a top down approach but transparently collaborate on a strategy from conceptualization to implementation.
- Be very aware of internal politics and carefully manoeuvre around it. Wine industry politics had a huge influence on the project through certain individuals or their organizations either supporting BWI or not, depending on the internal politics climate.
- Know how far you can push issues before making enemies of the industry. Keep them on your side and not against you - try maintain an "ally" image to all sectors of the industry
- 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.
- Be flexible and reasonable to negotiate trade-offs, don't come in with a "crusader" or activist approach.
- Work through existing structures (e.g. IPW). Don't re-invent the wheel or create more structure unnecessarily.

Project sustainability

- Secure a MINIMUM of 2 years of pilot phase funding – accept that 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 (we had gentleman's agreements & good intentions which didn't hold weight when it came to the crunch).
- It is essential to have a competent team with complimentary skills from conceptualization to implementation.
- Lessons learnt from successful partnerships must be shared and extended to other receptive industries in the same region.
- 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.
- We should have just worked with 1 organisation's books not SAWB & BotSoc.
- Giving money to SAWB instead of BotSoc was not an effective way of ensuring the project was mainstreamed into the industry.

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

Engagement strategy and catalysts

- Short-term economic incentives are needed to engage the private sector. These must be supported by long term sustainability benefits.
- When engaging industry, come to the table with an informed, solutions-based approach.
- Work through existing industry structures (e.g. Winetech, IPW) to promote the uptake and acceptance of a conservation initiative. It also saves money, time and is more likely to be supported by industry.
- 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.
- Determine the market leaders and understand the industry positioning on global basis, to enable playing competitors off one another
- 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.
- 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 (e.g. WineCellars SA, Vinpro, Rudnet).

Regulatory environment

- Look for gaps in credibility on regulatory mechanisms (e.g. lack of IPW suspensions)
- Mutually reinforce existing national legislation (i.e. make guidelines encourage compliance with laws)
- Synthesize respective environmental and agricultural laws into an understandable format – i.e. show that the guidelines are the tool to achieving 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.

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 we 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 – involve NGO's, academics, government, communities & business.
- Implement the conservation strategy prior to releasing the marketing strategy to maintain credibility for the initiative.
- 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.

Pilot phase institutional home (SA Wine Industry Council)

- **Strategic office space** – Project implementors should ideally be based in the head-office the main industry body (such as SAWIC) or 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. One also gets to meet many interesting industry role-players who come to the offices for other meetings that one one not normally get a chance to engage with, and 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 BWI branding).
- **Restructing process** – the uncertainty over about 6-8 months in 2006 put our 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, which hasn't happened and so funding raising attempts have had to happen at the last minute.

Communication & public relations

- **Project ambassadors** - Identify and appoint high profile people as 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.
- **Champions as BWI mouthpieces** - enlist high profile corporates as champions (e.g. Vergelegen) and, using their leverage, enter into joint ventures to 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.
- **BWI website** - having a well-maintained and regularly updated project website is of huge benefit and well worth the money spent 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 already have a good idea what BWI is all about & the member requirements. However, 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 (Sep 06). So far it seems to be a successful way of keeping our members & other stakeholders informed with what is happening in the project. We should have possibly initiated newsletters earlier in the project. Because they are time-consuming to produce, 3 newsletters a year is more than enough. The 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.
- **BWI displays at expos & wine shows** – these 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 feedback
- **BWI presentations** – there have been many opportunities to give BWI presentations to a range of different audiences such as industry groups, landowners, the media and the general public. Adapt the content and style of your presentation 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 really listen to the detail and be interested.
- **Communication with members & champions** – an email 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 approx. 70 producers. So for anything really urgent, send more than 1 email reminder, be persistent and resorting to phoning 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. We owe much to WOSA and have worked very well together.



- **Lay-mans language** – The conservation sector is generally not good at marketing our natural assets to the general public and people within the industry (e.g. magnificence of the Cape Floral Kingdom – this often stays in scientific realms). Use lay-mans terms and clever slogans to get biodiversity terms into the public arena & popular media.
- **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 marketing & promotional material. Thus far, 2 members (Waterkloof & Oak Valley Wines) have incorporated BWI text and the website into their backlabel text and 2 (Waverley Hills Organic Wine and Delheim) have incorporated a biodiversity reference on their cork. 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 was not suitable for reduction to a small size. Many others asked for a BWI sticker they could display on a wine bottle as an identifier (supported by many consumers too). This is what prompted us to get a special BWI sticker produced. Of the 70 members currently on board, only about 3 have included anything about their BWI status on their own website.
- **Consumer marketing** – in the pilot phase, efforts to market BWI wines to consumer were rather limited (e.g. distributing flyers with the list of members & champions, setting up displays and doing public presentations), while we concentrated on building up sufficient member numbers. In the next phase, there is now opportunity to really target environmentally conscious consumers with creative marketing strategies. The sticker being developed for wine bottles will be the first step in actively advancing consumer awareness.
- **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 producers to enlist as members (producers featured in Winelands, Africa Geographic & Skyways were especially pleased).
- **50/50 TV coverage** – BWI went to great lengths to get the environmental TV programme called “50/50” to film a BWI story. This took a lot of organizing and tricky negotiating around which farms were selected for filming. Eventually a 5-minute insert was produced and the content and factual accuracy was excellent, but the response to this insert was dismal. This is possibly because few wine producers watch the programme or else many people saw it but didn’t choose to contact BWI afterwards. The insert did possibly lack a marketing drive aimed at persuading a consumer to support only “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. Most surprising!

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 and not be exclusive, 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 they must pay for a consultant's time. It seems that these producers do not want the BWI status badly enough to warrant that level of investment. It is actually better if BWI staff have visited all the farms and 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 the 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 biggest needs for this role, backed up by a accurate understanding of biodiversity issues & the conservation sector in the province. It is a huge advantage if you can speak and write in Afrikaans, seeing as the wine industry is still predominantly Afrikaans-speaking. One is generally more easily accepted if you speak Afrikaans. If English-speaking, make at least an effort to begin a presentation in Afrikaans and then switch over, and at least try speaking Afrikaans in casual conversation if not confident for public speaking. If addressing an Afrikaans audience in English, then it is advisable to translate text on the power-point slides into Afrikaans.
- **Technical Working Group** – this group was useful in the beginning, but no longer necessary once biodiv guidelines were developed.
- **Steering Committee** – 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 performs more of a “sounding board” function and source of new ideas & 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** – BWI has consisted of a small team of 2 people (1 co-ordinator & 1 extension officer) 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 (difficult but necessary!)

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.
- In many cases mentioning our close collaboration has given us better acceptance by producers, seeing as IPW is a well-known entity, established a few years ago.
- 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.

Disadvantages

- There are limitations to the credibility of IPW because it is largely still a self-evaluation system with spot audit, which could be associated with BWI. 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. We first then have 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 as it is not easy to be fully compliant with all legislation and a DWAF general authorization must be in place (which in itself can take months, even years to obtain). For this reason we only managed to get 3 champions on board in 2 years (although this does keep the champion status still enviable, which is good).
- The IPW governance system is embedded in bureaucracy and so many decisions have followed a rather tortuous path

Working with other project partners

- **LandCare** – been useful but don't count on their extension officers helping implement our biodiv guidelines. More opportunity for closer collaboration in the future.
- **CapeNature** – Generally relationship has remained good over the 2 yrs. It has been useful to visit farms together where there is a stewardship potential for the property, so as not to confuse landowner.
- **Green Trust, WWF & Nedbank** – they had quite a few funders requirements placed on us, but mostly understandable. Much discussion was had at the Green Trust Executants workshop in April 2006 about marketing the projects better through



Nedbank & educating their staff in what work the Green Trust sponsors, but not much has come of this. Many mutual advantages still exist.

New Institutional home

- Process 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” into an institutional home would regularly change. With no road maps to guide us, path-finding was at some times, like groping around in the dark!

Extension work

- **Approaching landowners** - Make the industry’s support for the initiative one of the first things mentioned – 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 (e.g. LandCare or Stewardship) and accompany them on some site visits to be introduced by them if they have good rapport 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’s 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 their departments negatively affects ours, and makes the need for extension work by an NGO grouping all the more needed.
- **Express enthusiasm** in their natural areas to help landowners value their habitats more.
- **Correct misperceptions upfront** – e.g. WOSA credo confusion

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 cost.
- **Learning through doing** - although we advise champion and co-ops to make use of consultants to do their applications, they should still be given an opportunity to do it themselves. This is actually better in the long-run for educating landowners in biodiversity management issues, and better ensuring that implementation of the recommendations in the document. Besides the high cost, consultants can sometimes just create impressive documents.
- **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. Press coverage after the 2 member awards held so far has been good.

Biodiversity tourism

So much potential exists and little has been tapped! Very few members have developed eco-tourism facilities. Only 1 member (Mooiplaas) has developed a ecotourism product (namely a hiking route through their conservation area) since being involved in BWI. More facilitation needed to encourage or unlock this.

Biodiversity wine routes – expected more to get going, only 1 to date (Green Mountain Eco-Route).