



SWR Global Reference Framework

Creating the ultimate, global guide to navigating sustainability in wine

Over the past year, the Sustainable Wine Roundtable (SWR) has developed its ground-breaking Global Reference Framework (GRF) for Sustainability in Wine. Building on best practice from the wine sector and elsewhere, the GRF is the first definitive statement of what 'sustainable wine' means.

Over the next year, the SWR will use the GRF as a tool to benchmark existing wine sustainability standards against each other, and against our new understanding of what sustainability entails. This benchmarking process will provide transparency and visibility about sustainability in the wine sector.

This will provide SWR members with a vital tool to respond to the increasing regulatory requirements on supply chain due diligence, and in the need to report on carbon emissions.

As well as the legal assurance, the process will provide clear additional benefits to all areas of the supply chain:

- **For retailers:** This benchmark will, for the first time, allow retailers to make direct comparisons between the claims made by different sustainability standards that exist in wine. This will allow them to communicate better on sustainability with their customers, and with their buying teams.
- **For growers:** Those growing grapes and making wine which certify to one or more standards will be better able to understand how the certification they have chosen is regarded by others in the supply chain.
- **For standards owners:** These organisations will be able to better understand how they compare with others, where they lead in what they require, and what gaps may exist which need to be addressed.

The work to create this global benchmark will be undertaken in three phases. At the end of each phase, the outcome will be published and publicised. A fourth phase of work perform an annual review of the GRF:

	Timeframe	Budget required (£)
Developing the scoring matrix	October – December 2023	20,000
Benchmarking an initial 20 standards	January – June 2024	40,000
Benchmarking of remaining standards	July – December 2024	40,000
Annual review of the GRF	September 2024	10,000

The role of the Global Reference Framework

The GRF is not intended to be a standard itself, against which companies’ activities can be audited. A wide range of wine sustainability standards are already in existence, the specifics of each of which reflect the diversity of agronomic environments, and the communities in which they sit.

However, the sheer number of wine sustainability standards causes confusion since there is no straightforward way of seeing how they compare with one another. In what ways are they the same? And in what ways do they differ?

The GRF provides, for the first time, the means to compare these standards with one another, and with global best practice in wine sustainability. This work will be undertaken in three phases:

Phase 1: Developing a scoring matrix

In order to be able to compare existing standards against the GRF, we will need to develop a fair and transparent scoring mechanism. The aim of this will be to assess the degree to which each standard includes those issues identified by the GRF as key elements of sustainability in wine. The scoring matrix will need to evaluate how far companies certified to a standard are required to perform against those issue identified by the GRF as key to sustainability:

- **Governance:** Quality and degree of governance, planning and oversight of sustainability within a wine business’s management processes
- **Sustainability issues:** The GRF identifies a range of environmental, ‘human’ and other topics which are key to sustainability, and therefore need to be included in what a standard requires of its certified businesses.
- **Audit:** Is the audit process robust enough to provide proper assurance of practice?

However, as well as assessing the content of each standard, the scoring matrix will also need to accommodate the fact that existing standards differ, not just in the issues that they cover, but also in the approach they take.

- Some set a very high bar for admittance, arguing that only high levels of performance are acceptable. This necessarily limits the amount of wine businesses certified.
- Others set a relatively lower bar for sustainability performance, with the view that it is important to include as many wine businesses as possible.

Over time, all standards need to encompass both inclusivity and excellence, and it is the SWR's aim, over time, to achieve this. However, at present, both paths have equal merit, and the scoring matrix needs to reflect this. Given that many of the issues in sustainability require a collaborative approach, it is likely that the scoring matrix will include a metric related to the degree to which a standard encourages cooperation between the companies it certifies.

Given these variables, it is highly likely that standards benchmarked will achieve their total score very differently. However, it is also important to avoid 'greenwashing'. Therefore the matrix needs to ensure that each standard requires at least a minimum level of performance consistent with a genuine commitment to sustainability. Standards whose total score falls below a certain level will not be considered acceptable as reflecting genuine sustainability practice. Establishing what that score should be will also form part of this work.

To ensure transparency, and to reflect the views of different parts of the wine sector, SWR will convene a small advisory group from amongst its members. SWR will develop a draft scoring matrix, which will then be presented to this group, and their comments and views incorporated into a final draft which will then be used for the benchmarking process.

Phase 2: Benchmarking an initial 20 standards

Having developed and agreed a scoring matrix we will then use this to benchmark an initial 20 wine sustainability standards. It is extremely important therefore that this process is undertaken in a collaborative and sensitive fashion. In applying the scoring framework to each standard it is vital, therefore, that this is done in conversation and collaboration with that standard's management team. In the case of each standards therefore the benchmarking process will consist of the following steps:

Initial internal benchmarking

Using the scorecard, SWR will develop an initial assessment of the standard being studied. This will include an analysis of the different aspects of the standard: where it is strong, and where there are weaknesses in comparison to the Reference Framework

Discussion and negotiation with standards organisations

This initial analysis will then be discussed in detail with the management team of the standard being studied. Where weaknesses exist, the aim will be to identify remedial actions that the standard organisation can take to bring it in line with the Reference Framework.

Agreeing the benchmarking

Based on the above, we will agree a 'Reference Framework Benchmark Score' with the standard holder, along with the steps which will be taken over time to fill in gaps that have been identified. This agreed score and remedial plan will be used in the annual benchmarking report.

Reporting

SWR will publish a benchmark report containing findings, scores and changes agreed with each of the standards covered.

Phase 3: Benchmarking of remaining standards

Following publication of the benchmarking of the first 20 standards, SWR will then continue to review all remaining wine sustainability standards. The methodology will be the same as that set out for phase 2.

Phase 4: Reviewing the GRF

The Reference Framework is designed to be the statement of the current 'best available' knowledge on what sustainability in wine requires. Necessarily this will need to be regularly reviewed and updated. Indeed, SWR's own work over the coming months will help push forward our knowledge on wine sustainability.

The Reference Framework published in 2023 will therefore be reviewed again in Spring 2024, to incorporate into it new knowledge and insights.

Why support this work?

- **LEGAL COMPLIANCE**
 - In September, financial service firm [DWS was fined \\$25 million](#) in the USA for making false sustainability claims. The work planned for the GRF will provide greater clarity about sustainability claims being made in the wine sector. This will be key in helping companies to respond to the tightening regulatory framework in places like the EU, and to show they are not 'greenwashing'.
- **CLARITY**
 - The benchmarking will allow cross-comparison of sustainability standards from around the world which will provide clarity:
 - For retailers, in developing listing specifications and in communicating with customers and buyers.
 - For producers, in being able to demonstrate to their clients that their claims on sustainability are robust.
 - For the industry as a whole by being able to better understand, quantify and demonstrate its sustainability credentials.
- **COST EFFECTIVENESS**
 - It is much more cost-effective for this work to be done by SWR. Each funding partner pays only a fraction of the cost rather than having to bear the entire cost themselves
- **AUTHORITATIVE EVIDENCE**
 - In any case, as demonstrated by our work on wine bottle weight, there is great value that can only be done credibly by an independent collaborative organisation like SWR. The proposed work, undertaken by SWR, is the only means by which benchmarking can be done.
- **SHARING BEST PRACTICE**
 - The project will provide the opportunity for sharing best practice. Standards organisations can learn from their peers.