

# Sustainability Scheme

## RULE BOOK



# 2023

### SWGB SPONSORS

SWGB SPONSORS



WINEGB  
WINES OF GREAT BRITAIN



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# Introduction

Founded in January 2019, Sustainable Wines of Great Britain [SWGB] is a service to WineGB members that seeks to inform them on sustainable issues and encourage them to become environmentally sustainable in their production of wine in the UK.

This Rule Book is designed to be an 'operation manual' for SWGB, so that all the Scheme stakeholders can clearly understand how SWGB functions. It should only be substantially altered after the revisions have been discussed at an SWGB Annual General Meeting and endorsed by the Scheme Members.

## Mission, vision & objectives of SWGB

### Our vision statement is:

To create a strong and vibrant community within the English and Welsh wine industry that actively promotes sustainability through information sharing, research and a certification scheme that is inclusive, effective and well-respected by our customers.

### Our mission statement is:

To secure sustainability at the heart of UK wine production.

**In order to realise its vision, through implementing its mission, SWGB has agreed the following objectives:**

Vinegrowing	Winemaking
<ul style="list-style-type: none"> <li>• Maintain and improve soil health</li> <li>• Manage vineyard canopies and yields optimally</li> <li>• Minimise and optimise pesticide inputs</li> <li>• Conserve the vineyard (and surrounding) environment and promote biodiversity</li> <li>• Reduce vineyard carbon footprint per hectare</li> <li>• Reduce, re-use and recycle vineyard waste</li> </ul>	<ul style="list-style-type: none"> <li>• Improve winery design to reduce environmental impact</li> <li>• Reduce the energy and water footprint per bottle of wine</li> <li>• Reduce the environmental impact of wine packaging</li> <li>• Reduce the carbon footprint per bottle of wine</li> <li>• Reduce, re-use and recycle winery waste and wastewater</li> </ul>



# Membership of the Scheme

Membership of the Scheme is restricted to commercial members of WineGB.

## Members are required to:

- ✦ Work towards the Scheme mission, vision and objectives by complying with the minimum standards and evaluation & planning scheme guidelines, and aiming to achieve the best practice guidelines, through a process of continuous improvement
- ✦ Download evidence and data for this activity onto the SWGB Data Repository
- ✦ Submit to an audit by the independent Auditing Partner on joining, then every three years
- ✦ Pay their SWGB membership fees, on joining, and yearly, at the start of the calendar year

## And are encouraged to:

- ✦ Join the SWGB Workgroup and Sustainable Vinegrowing and Winemaking Groups in order to further develop the SWGB Sustainability Scheme and improve our industry's understanding of sustainability issues, and develop the SWGB Sustainability Scheme.
- ✦ Promote the SWGB Trade Mark by displaying it on their bottles (labels or capsules), website and other promotional material, and by generating press releases.

In order to simplify the management of the Scheme, new members are advised to apply in a two-month membership recruitment window (November – December) each year.

Smaller vineyards are permitted to 'cluster' in groups of not more than six growers, and no more than 10 hectares in total in order to share membership fees. They will then be able to share a site on the SWGB Data Repository and apportion the membership fee amongst themselves. To keep their data separate, they will use the 'separate parcels' option on the Repository and will ultimately receive separate certificates. However, they will get audited as if they were one member, all at the same time (in the first year of membership, and then every three years), so they will need to coordinate their data entry and application.



# The roles & responsibilities of the Workgroup, Chair & Scheme Manager

SWGB is managed by the SWGB Workgroup: the implementation of the vision and mission, the application of the Rule Book and the execution of all decisions taken by the SWGB Annual General Meeting is the responsibility of the Workgroup.

The Workgroup is managed by its Chair, who is appointed by WineGB, and is a member of the WineGB Management Advisory Committee (MAC).

## The roles and responsibilities of the Chair are as follows:

- Manage SWGB meetings
- Propose goals & strategy
- Allocate the budget
- Set standards and assure the reputation of the Scheme
- Plan & coordinate
- Delegate tasks and assure task completion with quality outputs
- Manage the Scheme Manager on a day-to-day basis
- Support Members and resolve conflicts
- Liaise with WineGB Directors and other MAC groups
- Liaise with external bodies

In the Chair's absence, these functions can be delegated to a Vice-Chair, appointed by the Workgroup.

A Chair may only serve a maximum of six years, and the Vice-Chair, seven years, but a Vice-Chair can progress to the position of Chair after this period.

The SWGB Workgroup comprises 10 – 20 voting Members who act as individuals: they do not represent their employers or any other parties. All voting Workgroup members must be wine producing SWGB Members, and new members should be appointed by the current Workgroup membership soon after the AGM. Sponsors may be represented on the Workgroup, and the Workgroup can nominate advisory Members, but neither of these categories can vote at the meetings.

## The roles and responsibilities of the Workgroup Members are to:

- Attend at least 50% of workgroup meetings.
- At these meetings, to contribute to, then approve, aims, objectives, plans and other decisions, ensuring that they are achievable from an industry perspective
- Accept responsibility for specific actions, as agreed at the meetings
- Help promote and raise sponsorship for the Scheme.

The normal duration of participation in the SWGB Workgroup is five to eight years, but this can be extended if a Workgroup Member becomes the Chair or Vice-Chair of the Workgroup.

The day-to-day management of the SWGB Scheme is carried out by the Scheme Manager, who is appointed by a sub-group of the Workgroup, managed by the Workgroup Chair, but employed by WineGB.



## The roles and responsibilities of the Scheme Manager are to:

- Organise SWGB meetings (including the AGM) and generate and distribute the agenda and minutes
- Ensure the implementation of the SWGB meetings and communication strategies
- Maintain and update the reference editions of The Rule Book, Scheme Guidelines, Data Repository and Guidance Manuals
- Support Members in meeting Scheme Guidelines, and the Auditing Partner in completing audits
- Meet the target figures, as set in the Business Case, for recruiting new Members
- Maintain a database of Members, monitoring and encouraging their progress through the Scheme
- Maintain the database of Sponsors, ensuring that they are kept informed and are offered their entitled benefits.
- The promotion of the Scheme to customers and consumers
- Support the TSustainable Groups, so that they meet their function
- Support the organisation of workshops, vineyard/winery events, Sustainable Group meetings and the Annual General Meeting
- Take overall responsibility for the development of the website information pages

## The budget

SWGB is a service offered to WineGB members, but the principle under which it operates is that it is financed through Member fees and sponsorship. The majority of the fee that Members pay is that required to pay for the audit, the maintenance of the carbon calculator and data repository, and the awarding of the Certificate. WineGB offers logistical support to SWGB, particularly with regards to book-keeping and external and internal marketing, but SWGB should strive to be cost-neutral to WineGB.

### The SWGB budget comprises principally of the following items:

Income	Expenditure
<ul style="list-style-type: none"> <li>• Member fees</li> <li>• Sponsorship</li> </ul>	<ul style="list-style-type: none"> <li>• Auditor fees</li> <li>• Scheme Manager fees &amp; expenses</li> <li>• Project scholarships</li> <li>• Designer fees</li> <li>• Cost of updating the Carbon Calculator</li> <li>• Cost of updating the Data Repository</li> <li>• SWGB Chair stipend and expenses</li> </ul>

The budget is allocated by the Chair, but administered through the WineGB Office. The budget for the previous 12 months is presented to the AGM annually, as are future expenditure plans.



## The Sponsors

The Sponsors are vital to the existence of SWGB, as they provide the bulk of the funding required to employ the Scheme Manager.

They commit to donating £1000 a year for three years, for which they receive the following tangible benefits:

- Logo featured on the Sustainable Wine GB area of the industry website with hyperlink to own website
- Logo featured on regular SWGB bulletins and other newsletters
- Opportunity to be represented on the SWGB Workgroup and Sustainable Groups.
- The opportunity to inform Members of their products and services in the Audit Guidance Manuals
- Opportunity to send representatives to meet and network with members at events organised by SWGB
- Opportunity to propose a short presentation at SWGB workshops and seminars (where relevant)
- Trade Membership of the Wine GB industry body, which includes access to the Members' area of the WineGB website, regular news bulletins, the Grape Press, dates for the diary, and information about regional meetings

The Sponsors are recruited and managed by the Scheme Manager, who seeks opportunities for their promotion, and keeps them well-informed with Scheme developments.

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## The Annual General Meeting

The Annual General Meeting (AGM) is organised by the SWGB Workgroup, and takes place in January. It is held at a location that must be convenient for the majority of members, and is available to Members via videolink. Scheme Members, Sponsors and representatives of WineGB and the Auditing Partner are invited to attend. Only Scheme Members may vote; all voting is carried out online. .

There can be no charge for attendance, but a charge can be levied for refreshments, or for a subsequent conference. The date of the AGM must be published to Members at least a month in advance, and the agenda, with all proposals clearly shown, should be communicated to them in full at least one week in advance.

### The principal agenda items to be dealt with in the AGM are as follows:

- Approve the Chair's report, which includes the accounts and financial plan for the following year.  
If the report is not approved by the majority of Members, the Chair must present a revised financial plan for approval to the members within 30 days. If this is still not approved, a vote of confidence in the Chair is triggered. If the Chair loses the vote of confidence, an Extraordinary General Meeting (EGM) is held within 30 days (under the same conditions as the AGM), where Members can agree a new Chair.
- Welcome new Members and celebrate awards of the Certification Mark
- Review and update the Scheme Objectives, Rule Book and Guidelines



Proposed changes must be confirmed by a two-third majority of Members at the AGM. Changes in Guidelines cannot lead to the revocation of Certification Marks awarded less than three years prior to the AGM. The meeting may award a 'conversion period' of up to three years when agreeing new Minimum Standard Guidelines. After the AGM, the updated version of the Scheme Guidelines will be published on the WineGB website (both Visitor and Member areas), and should not be changed until the subsequent AGM, unless an EGM is called.

- 🦋 Agree the webinar, workshop & bulletin themes
- 🦋 Discuss plans for promoting the Scheme and the Members' wines to customers and consumers.





# The SWGB Communications Strategy

Audience	Objective	Format	Delivery method	Frequency	By whom
SWGB Workgroup and Sustainable Group Members	Organise meetings	Set date	Dates published at preceding AGM	Annually, at AGM	Scheme Manager (SM)
		Agenda and meeting papers	Member emails with links to Google Drive	1 week prior to meeting	
		Minutes		1 week after meeting	
SWGB Members	Inform on sustainability issues	4-page Bulletins on specific topics	<a href="mailto:sustainability@winegb.groups.io">sustainability@winegb.groups.io</a> , list of member emails, and website	Quarterly	SM & Chair
	Inform on meetings and events	2-page Updates with around 40 links to articles, websites, webinars		1-week summary of meeting decisions and event	1 week after event
WineGB Members who are not SWGB Members	Inform on sustainability issues	Bulletins and Updates as above.	<a href="mailto:members@winegb.groups.io">members@winegb.groups.io</a>	Monthly	SM
	Recruit to SWGB	Email with ppt presentation and link to application form.	<a href="mailto:members@winegb.groups.io">members@winegb.groups.io</a> & individual emails	October/November	Chair
WineGB MAC	Coordinate activity between groups	2-page report on membership, recent developments and future plans	Email to WineGB CEO	Quarterly?	Chair
WineGB South East	Inform regional decision-makers	2-page report on membership, recent developments and future plans	Email to WineGB regional secretaries	Quarterly?	Chair
SWGB Sponsors	Inform and involve	Bulletins, Updates and Summaries, as above	<a href="mailto:sustainability@winegb.groups.io">sustainability@winegb.groups.io</a> , list of Sponsor emails	Quarterly, plus after each event	SM
Customers and consumers	Promote our industry as sustainable	Press releases and videos based on triannual themes,	Twitter, Facebook, Instagram, Vineyard Magazine, Website	Every 2 months	SM & WineGB Office
	Promote Certified Members' wines				



# The SWGB Meetings Strategy

Group	Principal purpose	Membership	Location	Frequency
SWGB Workgroup	Manage SWGB: implement its vision and mission. No Sponsor presentations.	10 – 20 voting members + Sponsor reps.	Mostly online	Four times a year
SWGB Annual General Meeting	Approve the Chair's report. Review and update Scheme Rule Book, Objectives, and Guidelines. Sponsor presentations invited.	All SWGB Members (voting), but meeting is open to Sponsors and WineGB Members	Denbies Wine Estate	Once a year (end of January)
SWGB Sustainable Vinegrowing Group	Discuss new developments in vinegrowing sustainability issues. Propose revisions to vinegrowing Objectives and Guidelines. Sponsor presentations invited.	10 – 20 voting members + Sponsor reps.	SVG Members' places of work or online	Twice a year
SWGB Sustainable Winemaking Group	Discuss new developments in winemaking sustainability issues. Propose revisions to Winemaking Objectives and Guidelines. Sponsor presentations invited.	10 – 20 voting members + Sponsor reps.	SWG Members' places of work or online	Twice a year
Sustainable Vinegrowing Workshops	Exchange ideas on sustainable viticulture. Generate community of shared values. Sponsor presentations invited.	All SWGB Vinegrowing Members, but meeting is open to Sponsors and WineGB Members	SWGB Member Vineyards	Six times a year
Sustainable Winemaking Workshops	Exchange ideas on sustainable winemaking. Generate community of shared values. Sponsor presentations invited.	All SWGB Winemaking Members, but meeting is open to Sponsors and WineGB Members	SWGB Member Wineries	Four times a year
SWGB Study Tour	Exchange ideas on sustainable wine production.	All SWGB Members, but open to Sponsors	Wine-producing European region	Once a year



# The SWGB Sustainable Groups

There are two Sustainable Groups: Vinegrowing and Winemaking, which consist solely of Scheme Members, and are managed by the Scheme Manager. Sponsors may send a representative to their meetings as an observer. Members are encouraged to contribute to the work of at least one Sustainable Group. Each Group will have a Chair, normally chosen by the SWGB Workgroup from amongst their members.

## The Sustainable Groups will aim to:

- ✦ Inform Members of new developments in sustainability issues, through organising workshops
- ✦ Evaluate the Scheme Objectives and Guidelines, then propose revisions at the Annual General Meeting
- ✦ Respond to issues raised in the quarterly SWGB Auditors Reports
- ✦ Liaise with the WineGB MAC Vinegrowing and Winemaking Technical Committees

## The Sustainable Groups will meet formally at least five times a year:

- ✦ Three workshops, for all the Scheme Members, on specific sustainability issues
- ✦ Two formal meetings to review Scheme Guidelines relating to their discipline

Although guest speakers may be invited, these events should be cost-neutral to the SWGB budgets.

Membership will be of 10 – 20 voting members (+ Sponsor reps.), which will be reviewed in February each year. If there are more than 20 applications, a waiting list will be established, and members will be asked to retire according to the length of service. Members will be asked to leave if, at the end of the year, they have not attended at least half the meetings.

# The Scheme Objective and Guidelines

The SWGB Guidelines are designed to meet the following objectives:

Vinegrowing	Winemaking
Maintain and improve soil health	Improve winery design to reduce environmental impact
Manage vineyard canopies and yields optimally	Reduce the energy and water footprint per bottle of wine
Reduce (and optimise) pesticide inputs	Reduce the environmental impact of wine packaging
Conserve the vineyard (and surrounding) environment and promote biodiversity	Reduce the carbon footprint per bottle of wine
Reduce vineyard carbon footprint per hectare.	Reduce, re-use and recycle winery waste and wastewater
Reduce, re-use and recycle vineyard waste	



## In order to work towards these objectives, the Scheme employs three categories of Guidelines:

- Minimum standard, which must be applied for those who wish to produce wine for SWGB certification.
- Best practice (from a sustainable perspective), which should be encouraged for those who wish to produce wine for SWGB certification. It is anticipated that these will ultimately become minimum standard guidelines for the scheme.
- Evaluate and plan. These guidelines are compulsory for Members once they have successfully completed their first Scheme audit.

## The quality improvement cycle below will be deployed:



The observe/measure/record activities (at the top of the cycle) form the basis of the Minimum Standard Guidelines. The results of this activity will generate data that will be evaluated, compared and benchmarked (without attribution) with that of the other members through the Data Repository. The next steps are to set new standards, and draft plans to reach these targets, which can then be implemented. Subsequent to the first successful audit, members will be required to evaluate their practices and design an improvement plan/strategy in the following areas:



Vinegrowing	Winemaking
• Soil health and vine nutrition	• Winery building
• Vineyard floor management	• Energy use
• Vineyard canopy and yield management	• Water use
• Integrated pest management	• Wastewater disposal
• Estate conservation and biodiversity	• Packaging
• Waste management	• Waste management
• Carbon footprint reduction	• Carbon footprint reduction

These plans will be kept and updated on the SWGB Data Repository.

Sustainable Group members will be tasked with developing 'best practice' in their area; i.e. proposing new guidelines, targets, standards and systems so that all scheme members (but especially those in the worst-performing quartile) can work together to achieve the core objectives.

Once fully developed (practical, realistic and auditable), 'best practice' guidelines will become 'minimum standard' for all members, with a conversion period, if appropriate.

## The SWGB Data Repository

The aims of the SWGB Data Repository are to:

- ✦ Assist Scheme Members in storing and presenting the information and evidence required for audit
- ✦ Enable the benchmarking of Key Performance Indicators so as to help Members evaluate their performance from a sustainability perspective
- ✦ Assist the Auditors in fulfilling their function, both to check evidence and to verify that there has been continuous improvement between subsequent audits.

This facility is private and secure, and allows Scheme Members to conveniently store the data, lists, diagrams, photos, tables, evaluations and strategic plans that they will need to improve their sustainability and successfully complete their audits. Although the audits are only carried out every three years, some of the Member information will need to be updated annually.



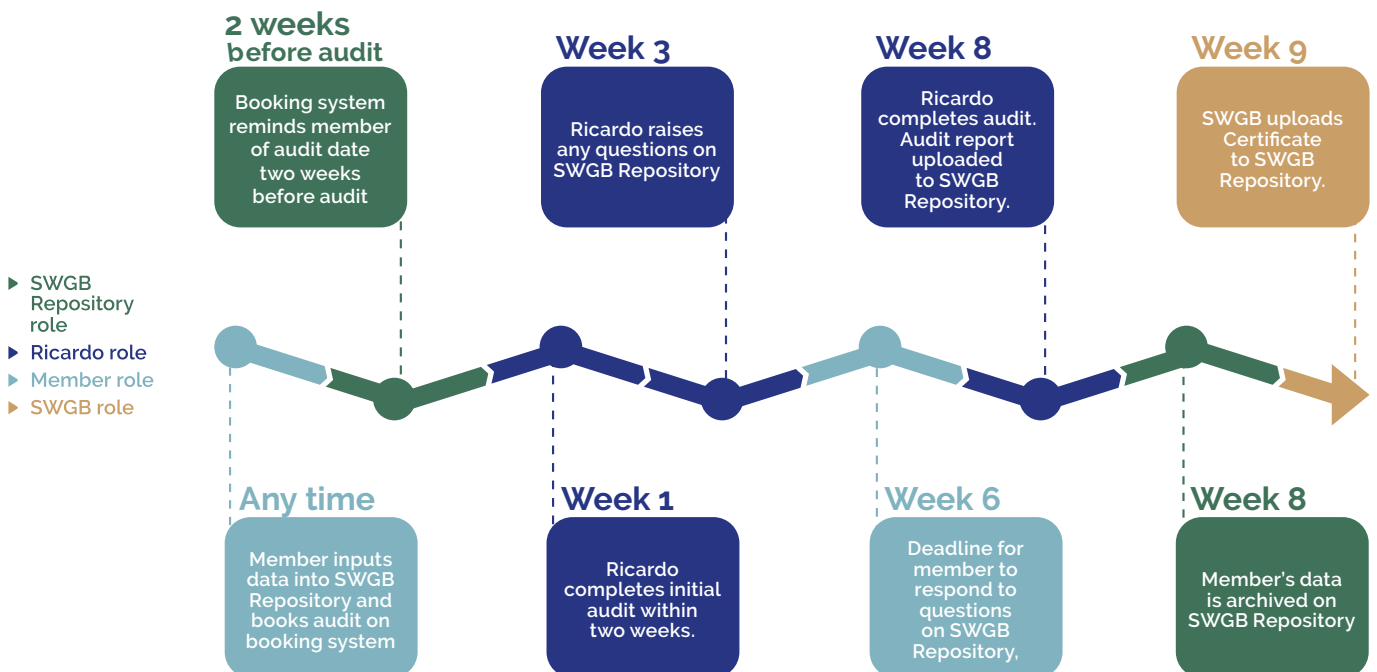
# The Guidance Manuals & Auditing Process

The Vinegrowing and Winemaking Audit Guidance Manuals consist of advice and sources of information, designed to assist Members in gathering evidence for audits. It is important to note that this document is for guidance only; the Auditor reserves the right to use their discretion, on a case-by-case basis, when assessing the evidence submitted. The Scheme Manager will update these manuals annually, after the AGM. New versions will be distributed by the Scheme Manager to all Members, and they will also be available to them on request.

Ricardo plc. have been appointed to provide independent verification of the Scheme, thus giving the SWGB Certification Mark enhanced credibility. They will do this by carrying out rigorous, but fair, remote audits of Members against the Guidelines within the first year of joining the scheme, then every subsequent three years. As the audits are remote, they will rely to some extent on trust and honesty. During this process, Members are encouraged to use their Scheme random 4-digit number, rather than their name, on all correspondence. Only the Scheme Chair and the Scheme Manager can determine the identity of a Member from their Scheme number. The Member can ask for a new Scheme number to

be allocated at any time. All evidence supplied for audit will be treated confidentially; discussions and feedback provided will be strictly private between the Auditor and the Member, through the Repository. The only exceptions to this are in the case of an appeal against an auditing decision (see below), and in the Auditor's quarterly report, where (anonymised) best practice will be shared with the Members.

The audits are timed at the Members' request, and booked through the [repository booking system](#) but we recommend that the end of the annual cycle (July, August for winemakers & October, November for vinegrowers) as the most appropriate time. All evidence must be supplied electronically through the SWGB Data Repository. Once the Auditors have received the evidence, they will review it within three weeks, then provide the Member with their initial findings, making any additional requests for evidence, if necessary. The Member will be given three weeks to respond to a request for additional evidence, after which the audit will be completed within two weeks, as illustrated in the diagram below.





If a Member fails an audit, they will not be identified, but will be invited to re-engage with the process at a later date. There will be an extra charge if this is within the three-year auditing cycle. Appeals against an Auditor decision must be dealt by a panel selected by the Chairman of WineGB for the purpose of hearing the appeal. It shall consist of at least three persons, none of whom shall have any direct commercial interest in the subject of the appeal.

Once a year, the Auditor will publish a report summarising the auditing activity in the previous year and offering recommendations to improve the auditing process.

On their second, and subsequent, audits, the Auditors will expect Members to have self-evaluated, met targets set in the previous audits (if not, why not?); re-assessed their situation relating to each objective; and set new targets. The Scheme will expect continuous improvement.

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## The carbon calculator

Members are required to calculate the carbon footprint of their vineyard and winery every year, using the [WineGB Carbon Calculator](#). They are supported in this by an advice and information website page with links to bespoke vineyard and winery data collection sheets for Members

to gather the information that they will need to complete the calculator itself. The Farm Carbon Calculator Company will adapt their free online tool to our needs. Anonymised key data from SWGB members will be generated, which will be used for benchmarking and setting standards.

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## The Trade Mark

WineGB has registered the 'Sustainable Wines of Great Britain' logo (on the front of this document) as a Trade Mark (TM) with the UK Intellectual Property Office. No person (outside the SWGB and WineGB Officers) may use the TM except by virtue of being a Member or Sponsor of SWGB, and no Member

may display it on one of their products without being awarded a Certificate. This Certificate is issued by WineGB to members who comply in full with the requirements of the Wine GB Sustainability Guidelines; through successfully completing an SWGB audit no more than three years ago.

### The TM is administered by a Certification Committee, which:

- ✦ Awards the Certificates to Members after notification of a successful audit from the Auditor
- ✦ Keeps a record of certificate holders, complaints and remedial actions
- ✦ Receives notification of an appeal against an audit decision, and appoints a person to examine vineyards, wineries and wines if deemed necessary, in order to investigate an appeal or assure the reputation of the Mark
- ✦ Ensures that the Trade Mark is only used by those with a current Certificate, according to the published Mark Guidelines, and on appropriate goods.

The Certification Committee is appointed by the Directors of WineGB, and consists of not less than three persons, none of whom should represent specific UK wine producers.





When an audit is successfully completed, the Auditor notifies the Scheme Manager, downloads his report onto the Member's area of the Data Repository, and archives all the data relating to the audit. The Scheme Manager asks the designer to prepare the certificate and requests that the Certification Committee approve its award. If all goes well, the Manager downloads an electronic version of the Certificate to the repository, and sends a printed and framed copy of the Certificate

to the member by post. The Scheme Manager keeps a register of all the Certificates issued, along with dates of expiry, and a register of wines bearing the SWGB Trade Mark, checking that they are produced from grapes grown in a Scheme-certified vineyard and processed in a Scheme-certified winery. All Members must complete and submit an online form, before they release a wine bearing the SWGB Trade Mark on its container (e.g. on a bottle label). A new form must be submitted for each wine.

**The Trade Mark Guidelines are available from the WineGB website and on request from the Scheme Manager, but principally consist of the following recommendations:**

- ✿ The Mark may be used by members on their websites and other communications as soon as they join the scheme, but may only be used on the labels of bottles if the wine is made in a Scheme-approved winery and contains at least 85% of fruit grown in a Scheme-approved vineyard\*. Upon gaining certification, members may only use the Mark on wines substantially produced in vintages where both the vineyard and the winery data were approved through an SWGB audit.
- ✿ The Mark should only be used in the approved (Pantone 4208C) colour, in black on pale backgrounds, or in white on dark backgrounds
- ✿ The Mark must always be used in an upright position, at a minimum size of 12 mm in diameter, and should not be changed or distorted in any way. The only exception to this is for Founder Members, who may use the Founder Member version of the Mark (minimum size 15 mm) if they wish to do so.
- ✿ The Mark must be surrounded by an exclusion zone of at least a quarter of its diameter. For example, if the Mark is being printed at 2cm, the exclusion zone from each edge would be 0.5cm. No other content must be placed within this zone.

\*Non-WineGB members may not apply for Scheme Certification, but grapes from non-WineGB member growers may be used in Member's wines seeking Scheme Certification, as long as the non-member vineyard successfully passes a Scheme audit. This arrangement will be reviewed in 2023 by both the SWGB Workgroup and ultimately the WineGB Board.

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## Promoting the Scheme

Promoting the Scheme to WineGB members, in order to encourage them to engage with SWGB, is the responsibility of the Scheme Chair and Manager.

Promoting the Scheme to consumers and customers is the role of the Members, the Scheme Chair and of the WineGB Marketing team. It is important to note that, although the Scheme should provide a 'halo'

effect for the whole UK wine production industry, Members need to sell their wines in order to be economically sustainable.

The WineGB Marketing team will be asked to review their progress and propose new initiatives at the Annual General Meeting.





## Privacy notice

Any information that SWGB Members provide with their application for membership or as evidence for audit will be used solely for the purpose of processing the application (including payment processing), completing the auditing process, and providing services to Members.

### These services will include:

- The creation of the Members register (a list of which will feature on the Visitors area on the Wine GB website)
- Contacting Members with membership information, events and opportunities
- Receiving limited marketing communications from the Sustainable WineGB Sponsors, in recognition of the support they provide to our industry body.

Information and data will not be shared with any other party for marketing or commercial purposes without firstly obtaining a Member's explicit consent. A copy of the full WineGB privacy notice can be obtained from the Wine GB Office.



# The 2023 Scheme Guidelines

Guideline categorisation	Vinegrowing Guideline	Evidence required to meet the guideline
<b>Maintain and improve soil health</b>		
Minimum standard	Ground cover is present in vineyard inter-row alleys in the winter.	Vineyard maintenance diary <sup>1</sup>
Best practice	Ground cover is present in the alleys and headlands in mature vineyards throughout the year.	Vineyard maintenance diary <sup>1</sup>
Minimum standard	For each parcel <sup>2</sup> , carry out a soil survey that assesses soil fertility and health (including a soil profile; an evaluation of drainage, erosion risk, soil texture and structure; an earthworm count; and an analysis of macronutrient status, organic matter content & CEC <sup>3</sup> ) at least every 3 years.	Triennial soil survey for each parcel <sup>2</sup>
Evaluation & planning <sup>4</sup>	For each parcel, evaluate the health of the soil, then create a plan designed to maintain and improve soil health, year on year, particularly focusing on regulating pH, maintaining soil structure, replacing soil nutrients and maintaining organic matter levels.	Soil health and vine nutrition evaluation and management plan for each parcel, revised every three years
Minimum standard	For each parcel, record the cultural interventions relating to the soil (including cultivations, and fertiliser & herbicide applications) carried out in the vineyard.	Vineyard maintenance diary
Evaluation & planning	Evaluate, from a soil health perspective, current practices used to manage the vineyard floor, then create a plan to reduce the impact of these interventions on soil health.	Vineyard floor evaluation and management plan for each parcel, revised every three years

<sup>1</sup> A day-by-day account of vineyard interventions, with a summary of total number of operations and inputs, for each parcel

<sup>2</sup> Parcel = unity of vineyard that is managed in the same way (receives the same treatments and inputs)

<sup>3</sup> Cation Exchange Capacity

<sup>4</sup> Evaluation and Planning Guidelines become compulsory on second and subsequent audits



Guideline categorisation	Vinegrowing Guideline	Evidence required to meet the guideline
<b>Manage vineyard canopies and yields optimally</b>		
Minimum standard	Keep annual records of buds left per hectare at pruning, yields, average bunch weight and pruning weight/hectare (Ravaz index) for each parcel.	Annual vineyard monitoring record of yields, pruning weights and average bunch weight for each parcel.
Best practice	Grapevines pruning is informed by the SWGB principles of sustainable pruning.	Signed SWGB principles of sustainable pruning form
Evaluation & planning	Evaluate vineyard canopy and yield management for each parcel, focussing on the quality of the winter pruning, the resulting canopy, and the yield and quality of grapes produced, then create a plan to optimise canopy and yield management, setting new targets and actions to meet these targets.	Vineyard canopy and yield management evaluation and plan, revised every three years.
<b>Minimise and optimise pesticide inputs</b>		
Minimum standard	During the growing season, monitor for pests and diseases at least every fortnight	Vineyard monitoring diary
Minimum standard	Use biological, cultural, mechanical, biosecurity and physical plant protection methods, in conjunction with chemicals.	A list of plant protection methods used in the vineyard, also evidenced in the vineyard maintenance diary
Minimum standard	Pesticide applicator calibration and service records are kept.	Pesticide applicator calibration and service records
Minimum standard	Records are kept of every spray application for each parcel.	Vineyard pesticide application record with each pesticide application justified.
Best practice	Calculate the total Health Toxicity (HTI) and Environment Toxicity (ETI) Indices for each growing season.	A list and summary of the ETI and HTI values of the pesticides used in each growing season.
Evaluation & planning	Evaluate the effectiveness of all plant protection measures, then create a plan, with targets and actions to increase efficiency and effectiveness and to minimise and optimise the use of pesticides	Vineyard protection measures evaluation and plan, revised every three years



Guideline categorisation	Vinegrowing Guideline	Evidence required to meet the guideline
<b>Conserve the vineyard (and surrounding) environment and promote biodiversity</b>		
Minimum standard	Map wildlife habitats and environmental, landscape, archaeological and historical features in the vineyard.	Estate conservation map, with photos of features
Best practice	Monitor the range of plants in vineyard alleys and headlands	List of plant names found in vineyard alleys and headlands
Evaluation & planning	Evaluate the conservation value and biodiversity of the vineyard (and surrounding) environment, then create a long-term plan for both cultivated and non-cultivated land that protects and enhances conservation features	Estate conservation and biodiversity evaluation and promotion plan, revised every three years
<b>Reduce vineyard carbon footprint per hectare</b>		
Minimum standard	Use the WineGB Carbon Calculator for calculating vineyard carbon footprint per hectare of vineyard and per tonne of fruit produced	Carbon footprint data per hectare, and per tonne of grapes, as generated by the WineGB Carbon Calculator.
Evaluation & planning	Evaluate the carbon footprint per hectare and its contributory factors, then create a plan to reduce these figures and increase carbon sequestration, aiming to become carbon neutral by 2030.	Carbon footprint evaluation and reduction plan, revised every three years.
<b>Reduce, re-use and recycle vineyard waste</b>		
Minimum standard	Keep records of all waste generated by vinegrowing activities	List of waste produced by vinegrowing activities
Best practice	Assess the environmental sustainability of major purchases.	Standard SWGB form completed for all purchases with a value of more than £10,000.
Evaluation & planning	Evaluate the amount and type of waste generated by vinegrowing activities, then create a plan to reduce, re-use or recycle this waste.	Vinegrowing waste reduction and recycling evaluation and plan, revised every three years.



Guideline categorisation	Winemaking Guideline	Evidence required to meet the guideline
<b>Improve winery design to reduce environmental impact</b>		
Minimum standard	Evaluate the winery site and building according to geographic location, orientation, site integration and design factors, particularly those that pertain to environmental impact and energy efficiency.	Document evaluating winery site selection and building design, focusing on environmental impact and energy efficiency.
Evaluation & planning	Evaluate a range of actions that could reduce the environmental impact and increase the energy efficiency of the winery through design features, then create a three-year plan to implement the most effective and efficient improvements.	Environmental impact evaluation and plan for winery building, revised every three years.
<b>Reduce the energy and water footprint per bottle of wine</b>		
Minimum standard	Service machinery and equipment regularly, and repair or replace to ensure optimum energy consumption.	Servicing and repair records for winery machinery and equipment.
Minimum standard	Keep quarterly records of all energy sources used in the winery, and use them to calculate an energy footprint per bottle of wine.	Quarterly energy use records, in the form of energy statements, bills, or financial statements. Statement of total number of bottles produced per season in the winery.
Best practice	Real-time energy use records are collated in the form of metrics data to enable a detailed analysis of winery energy use.	Real-time energy use records
Evaluation & planning	Evaluate winery energy use, then create a plan that sets new targets and recommends strategies to improve energy efficiency.	An energy management evaluation and plan, with energy use reduction strategies, revised every three years.
Minimum standard	Monitor the amount of water used in the winery, and generate a figure for the amount of water used per bottle of wine produced.	Data on water used for the full production process, and number of bottles of wine produced.
Evaluation & planning	Evaluate water use in the winery, then create a plan to reduce water use.	Written evaluation and plan of water use, with measures for reduction in consumption, updated every three years.



Guideline categorisation	Winemaking Guideline	Evidence required to meet the guideline
<b>Reduce the environmental impact of wine packaging</b>		
Minimum standard	Record the products used for packaging wine, including colour & weight of glass, nature of stoppers and use of cardboard and plastic	Summary of products used for packaging wine.
Evaluation & planning	Evaluate the sustainability of the packaging used, then create a plan that aims to use products and services that minimise waste and have minimal environmental impact.	Packaging evaluation and plan, with actions to reduce environmental impact, revised every three years.
<b>Reduce the carbon footprint per bottle of wine</b>		
Minimum standard	Obtain at least 33% of winery energy from renewable sources (either internal or external).	Evidence of alternative energy supplying equipment (e.g. solar panels), or bills from suppliers of energy who use renewable sources.
Best practice	Obtain 100 % of winery energy from renewable sources of power	Evidence of alternative energy supplying equipment (e.g. solar panels), or bills and REGO certificates from suppliers of energy who use renewable sources.
Best practice	Bottles should be bought from a supplier using sustainable energy	Statement from bottle supplier formally stating that all sources of energy used in their manufacture is sustainable.
Minimum standard	Calculate the winery carbon footprint (using the WineGB Carbon Calculator) for the whole of the wine production process from transport of grapes to the finished, packaged wine. Does not include storage, marketing or distribution.	Results from WineGB Carbon Calculator, leading to calculation of carbon footprint per bottle.
Best practice	The wine production process is carbon negative overall (including offsets)	WineGB Carbon Calculator report, plus proof of any offsets used.
Evaluation & planning	Evaluate the carbon footprint per bottle of wine produced, then create a plan to reduce this figure, aiming to become carbon neutral by 2030	Evaluation of carbon footprint and plan to reduce carbon footprint, revised every three years.



Guideline categorisation	Winemaking Guideline	Evidence required to meet the guideline
<b>Reduce, re-use and recycle winery waste and wastewater</b>		
Minimum standard	Keep records of all waste generated by winemaking activities	List of waste produced by winemaking activities
Minimum standard	Report on how rainwater, winery wastewater, and other wastewater generated from the winery building, is dealt with.	Written report
Best practice	Grape marc is recycled, re-used (e.g. distilling) or used to generate energy	Written report on the fate of grape marc generated by the winery.
Best practice	Bidules and crown caps are recycled	Written report on the fate of bidules and crown caps used by the winery.
Best practice	Assess the environmental sustainability of major purchases.	Standard SWGB form completed for all purchases with a value of more than £10,000.
Evaluation & planning	Evaluate the amount and type of waste generated by winemaking activities, then create a plan to reduce, re-use and recycle this waste.	Evaluation of winemaking waste, then a plan for reduction and recycling, revised every three years.
Evaluation & planning	Evaluate the environmental impact of wastewater management in the winery, then create a plan to reduce the environmental impact over a three-year period.	Evaluation of the environmental impact of wastewater management in the winery, then a plan to reduce the environmental impact over a three-year period.



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