May 2017 update of the Regional Socio-Economic Development Institute of Canada (RSEDIC)

RSEDIC was created in 2015 to connect with communities, both locally and internationally. Its purpose is twofold:

1. To impact regional economies, and
2. To provide interdisciplinary research and training opportunities for faculty and graduate students.

RSEDIC houses a number of active interdisciplinary research projects, and is involved in major cross-campus initiatives. 2016-2017 was a busy year for RSEDIC, with the institute now positioned for growth in 2017-2018.

Research Activities
RSEDIC houses three major research initiatives, and all three have seen significant activity during the 2016-2017 academic year.

1. Positioning the BC Wine Industry for International Growth

Working with KEDGE Business School (Bordeaux, France) since Fall 2012, colleagues from UBC’s Okanagan campus have been engaging the British Columbia wine industry on its strategic development. The group of colleagues organizing the project are: Kim Buschert (UBC Library/Faculty of Management); Malida Mooker, Roger Sugden and Marcela Valania (UBC Faculty of Management); Jacques Olivier Pesme (KEDGE Business School, Bordeaux, France).

In 2015, Western Economic Diversification Canada provided $630,000 funding as part of a $1.3M project over three years (2015-2018), to enable the institute to support the emergence of British Columbia as a global wine region. Plans for this funding included organizing an industry task force on wine labeling and presentation, establishing a task force on the industry’s identity, analyzing intelligence that the industry gathers from international trade shows, using research and industry knowledge to identify and assess options for the industry’s organization, and modelling from advanced wine regions in the world.

A notable initiative was the introduction in 2014 of the annual UBC-KEDGE Wine Leaders Forum, which offers winery owners and principals an independent and
challenging arena for open participation, free expression and collective learning. There have now been four Wine Leaders Forums, with the 2017 forum recently held April 23-26 in Naramata, BC. The 2017 forum saw participation grow to 14 winery participants, with the primary outcome an agreed-upon list of tasks and action items to be shared between participating wineries and the industry more widely.

A major achievement in 2016 was the completion of the task force on wine labelling, which had significant impact on the wine industry. Following dissemination of the final report by the task force (see Appendix 1), the recommendations were taken up by industry representatives and used to stimulate discussion and industry deliberations. Based on these deliberations, recommendations were forwarded by the Canadian Vintners Association to the Minister of Agriculture and Agri-Food.

In 2017, the project team was also awarded $19,115 from the Social Sciences and Humanities Research Council (SSHRC) under the Connection Grant program for a dissemination project entitled “British Columbia as a Wine Territory: Catalyzing Shared Understanding of its Identity” (see Appendix 2, summary of project). The project team successfully set up the initial exhibition at the 2017 Wine Leaders Forum, and the exhibition will now be broken into four parts and distributed across BC wineries, including: Okanagan Crush Pad, Painted Rock Estate Winery, Summerhill Pyramid Winery, and Tinhorn Creek Vineyards. The exhibition at the wineries will be available between the busy tourist months of May – August. In September, the exhibition will be brought back together for a final display at the Penticton Public Library, which will run alongside a speaker’s series on the wine industry and its impact on regional socio-economic development. The project employs a graduate student research assistant from the department of Creative Studies, and is providing training in community and industry outreach and engagement.

2. Occupational structure in the Okanagan Nation Territory

This project is a cross-campus and inter-university research project focused around the role that the history of occupational structure plays in the development of regional economic strategies. An initial workshop was held in June 2016, with a follow-up scheduled for June 2017 (see Appendix 3, workshop attendees 2016-2017).


In late 2016, the Occupations initiative received $4955 in funding from UBC’s internal Humanities and Social Sciences grant program for a small project, “The History of
Occupations of Okanagan First Nation Men and Women” (see Appendix 4, summary of project). The project supports a part-time undergraduate research assistant in History/Indigenous Studies.

$10,000 of RSEDIC funds have been allocated for 2017 toward expanding this project in partnership with Snelwips Heritage Museum, in Westbank.

3. **Socio-technical change and regional economic development**

In 2016, a UBC Okanagan faculty contingent (including RSEDIC director, Sugden) travelled to Germany and the Netherlands to discuss partnerships with the German Aerospace Centre and the Technical University of Delft. This trip precipitated the development of an emerging cluster of researchers around the development and deployment of technology with a concern for shaping and impacting the regional socio-economic development of rural and remote communities.

In February 2017, an application was submitted to Western Economic Diversification Canada to support a post-doctoral fellow to undertake a comprehensive study of the industry potential and economic impact of developing and deploying small-scale electric airplanes in Western Canada (see Appendix 5, summary of project). This project is the first attempt to formalize what is developing as an innovative interdisciplinary methodology around a specific case study (“Clean Flight” – see Appendix 6). The WD application had the full support of all Deans on UBC’s Okanagan campus. If successful, this project will also result in an application for an NSERC Connect grant in the fall of 2017 to support a workshop dedicated to building a cross-sectoral consortium. It is also envisaged that the clean flight initiative will be foundational for a SSHRC Insight grant application to be submitted in October 2017.

**Cross-campus initiatives**

1. **Community-University portal**

The primary cross-campus initiative supported by RSEDIC in 2016-2017 has been the planning and initial development of a Community-University portal to support research, student learning, and community engagement (see Appendix 7, summary of project). The portal project is a joint-initiative between RSEDIC and the Institute for Community Engaged Research (ICER) with the support of the UBC Okanagan library. The project team – Jon Corbett (ICER Director), Roger Sugden, Heather Berringer (Chief Librarian, UBC’s Okanagan campus), and Mary Butterfield (Faculty of Management Research Coordinator) – has successfully applied for $25,000 of internal funding, and $5000 of RSEDIC funds have been allocated to this project for 2017. The project has recruited a community-based advisory committee to oversee the development of the portal, and construction of the tool is scheduled to begin in July 2017. The project team submitted an application for further funding ($25,000) for the project to the Canadian Internet Registration Authority in March 2017.
2. **2017 RSEDIC Seed Grant**

The Strategic Research Support Plan for UBC’s Okanagan campus prepared by the Vice Principal Research (2017) has outlined a process for the allocation of resources through the UBC Excellence Fund. This process includes funding in support of research cluster development on campus, and identifies six thematic areas and two cross-cutting strategic domains that will receive priority for funding. Regional socio-economic development has been identified as one of the cross-cutting themes, and in an effort to stimulate research activity in this area, RSEDIC launched a seed grant competition in early 2017 (see Appendix 8, RSEDIC Seed Grant program terms). The competition closed April 18, 2017, and funding decisions are expected by the end of May, 2017. These funded projects will be featured on RSEDIC’s website, and will be the focus of an RSEDIC workshop in the fall of 2017. $22,000 of RSEDIC funding has been allocated to the seed grant competition in 2017.

**Membership**

RSEDIC membership has remained static since its formation in 2015. The primary administrative goal for RSEDIC in 2017 is to re-engage and expand the membership, beginning with an AGM to be held later in 2017. This AGM will include updates on activities to date, and a strategic planning session to co-create goals for the Institute moving forward. Opportunities to be explored include establishing a speaker’s series, engaging with other research institutes based at UBC’s Okanagan campus for further joint-initiatives, and the preparation of a plain-language report on socio-economic research on UBC’s Okanagan campus for local, regional and provincial stakeholders.

**Attachments**

- Final report and recommendations of the task force of labeling and presentation
- Appendix 1: Summary of SSHRC Connection grant “British Columbia as a Wine Territory: Catalyzing Shared Understanding of its Identity”
- Appendix 2: Occupations workshop attendees 2016-2017
- Appendix 3: Summary of UBC Okanagan Humanities and Social Sciences grant “The History of Occupations of Okanagan First Nation Men and Women”
- Appendix 4: Summary of Western Economic Diversification application “Clean Flight”
- Appendix 5: Socio-Technical Change and Regional Socio-Economic Development brief
- Appendix 6: Summary of Community-University Portal project
- Appendix 7: RSEDIC Seed Grant program terms
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreword</td>
<td>2</td>
</tr>
<tr>
<td>Acknowledgements</td>
<td>3</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>4</td>
</tr>
<tr>
<td>Introduction</td>
<td>6</td>
</tr>
<tr>
<td>Task Force Objective and Composition</td>
<td>7</td>
</tr>
<tr>
<td>Objective</td>
<td>7</td>
</tr>
<tr>
<td>Composition</td>
<td>8</td>
</tr>
<tr>
<td>Task Force Activities</td>
<td>9</td>
</tr>
<tr>
<td>Labelling Focus</td>
<td>9</td>
</tr>
<tr>
<td>Communication of Task Force Work</td>
<td>9</td>
</tr>
<tr>
<td>Summary of Findings</td>
<td>11</td>
</tr>
<tr>
<td>BC Regulations</td>
<td>11</td>
</tr>
<tr>
<td>Federal Regulations and Guidance</td>
<td>12</td>
</tr>
<tr>
<td>Wine Council of Ontario</td>
<td>12</td>
</tr>
<tr>
<td>International Standard</td>
<td>13</td>
</tr>
<tr>
<td>Focus of Discussions in the Task Force, at Town Halls and at the UBC-KEDGE Wine Leaders Forum</td>
<td>13</td>
</tr>
<tr>
<td>Conclusions</td>
<td>14</td>
</tr>
<tr>
<td>Recommendations</td>
<td>14</td>
</tr>
<tr>
<td>Post Script: Industry Initiatives Independent of the Task Force</td>
<td>15</td>
</tr>
<tr>
<td>Appendices</td>
<td>17</td>
</tr>
<tr>
<td>Appendix A: Task Force Terms of Reference and Composition</td>
<td>17</td>
</tr>
<tr>
<td>Appendix B: List of Winery Task Force Participants</td>
<td>19</td>
</tr>
<tr>
<td>Appendix C: Backgrounder on Labelling Requirements for Origin Statements</td>
<td>20</td>
</tr>
<tr>
<td>Bibliography</td>
<td>27</td>
</tr>
</tbody>
</table>
FOREWORD

The international partnership between the University of British Columbia (UBC) in the Okanagan, Canada, and KEDGE Business School in Bordeaux, France, is intended to critically appreciate and support development of the British Columbia wine industry by bringing to bear the capabilities of universities.

This report is an output of the Task Force on Labelling and Presentation struck as part of the UBC-KEDGE project, *Position the British Columbia Wine Industry for International Growth*, which is supported by Western Economic Diversification. The aim of the project is to organize knowledge so as to help the industry to position itself internationally; in particular, so as to understand what would be required for British Columbia to emerge as a globally recognized wine region and, if industry actors so choose, so as to help them achieve that standing.

The task force comprised volunteers from wineries across British Columbia, who determined the principal areas it should concentrate upon. The report includes a summary of the task force development and its work, and presents recommendations from the industry participants.

Jacques-Olivier Pesme
Director, Wine and Spirits Academy
KEDGE Business School, Bordeaux, France

Roger Sugden
Dean, Faculty of Management
Advisor to the Principal on Innovation and Economic Development
University of British Columbia, Canada
ACKNOWLEDGEMENTS

We would like to especially acknowledge the contribution of the members of the British Columbia wine industry who participated in the task force.

Thanks to those from the industry and wider community who took the time to take part and share their observations in the UBC-KEDGE town hall meetings and the 2016 Wine Leaders Forum.

This report would not have been possible without the contribution of Kim Buschert. We would also like to thank Kim Partanen, who provided research support, and Malida Mooker and Marcela Valania for their valuable comments and suggestions.
EXECUTIVE SUMMARY

In November 2015 the Task Force on Labelling and Presentation was struck, as part of the UBC-KEDGE Wine Industry Collaboration project, *Position the British Columbia Wine Industry for International Growth*, supported by Western Economic Diversification. The task force carried out its main work from December 2015 to March 2016.

The task force committed to engage with industry stakeholders to provide recommendations about labelling and label architecture, including the specification of origin on labelling, for all wines that are produced by wineries in BC, both those containing 100% BC grown grapes and others, for the purposes of growing international and domestic markets.

Two fundamental, inter-related points stood out in task force discussions, at town halls and at the 2016 Wine Leaders Forum:

1. Participants agreed that accuracy about origin in labelling is crucial for a wine region to be taken seriously on an international level, and that British Columbia needs to meet international standards for stating country of origin.
2. They also expressed a desire to ensure clarity in labelling and to avoid misleading consumers in both international and domestic markets.

Participants emphasized that the interim measure in the CFIA guidance allowing use of the term, “Cellared in Canada” is problematic and could stand in the way of the industry adhering to standards such as that of the International Organisation of Vine and Wine (OIV), of providing clarity in labelling and of achieving global recognition.

As a result of these concerns, the task force recommendations focus on exploring actions regarding the interim measure and joining OIV.

The industry members of the task force recommend:

1. That the following options be put to all members of the industry for it to choose amongst regarding the statement “As an interim measure, the statement ‘Cellared in Canada’ by (naming the company), (address) from imported and/or domestic wines’
may also be used as a country of origin statement for wines blended in Canada” in the CFIA guidance on Labelling Requirements for Alcoholic Beverages:
   a. Maintenance of the status quo
   b. Removal with immediate effect
   c. Transition to removal

2. That the industry support the removal of the statement “As an interim measure, the statement ‘Cellared in Canada’ by (naming the company), (address) from imported and/or domestic wines’ may also be used as a country of origin statement for wines blended in Canada” from the CFIA guidance on Labelling Requirements for Alcoholic Beverages

3. In the event that the industry opts for (1)(c), above, that the transition be determined through an inclusive process across all types of wineries in British Columbia

4. That the options be chosen amongst in a recorded vote covering all types of wineries in British Columbia

5. That the industry pursue the possibility of participation in OIV
INTRODUCTION

The wine industry globally has seen the arrival of new producers and the opening of new markets for consumption. Such changes mean that wineries in British Columbia are facing tougher competition. These challenging times require adaptation to new practices, and understanding of new trends and markets.

One of the critical factors in building the foundations of a successful wine industry in any region internationally is the labelling of the region's wines, and in particular the specification of origin on labelling.

In this context, in November 2015 the Task Force on Labelling and Presentation was struck, as part of the UBC-KEDGE Wine Industry Collaboration project Position the British Columbia Wine Industry for International Growth, supported by Western Economic Diversification (WD), and following the UBC-KEDGE Industry Collaborative earlier that month.¹

The task force committed to engage with industry stakeholders to provide recommendations about labelling and label architecture, including the specification of origin on labelling, for all wines that are produced by wineries in BC, both those containing 100% BC grown grapes and others, for the purposes of growing international and domestic markets.

The task force carried out its main work from December 2015 to March 2016. Participants determined the principal areas it should concentrate upon, and developed sub-groups to focus on chosen aspects of labelling, and on strategies for communicating with industry and other stakeholders.

This report includes a summary of the task force development and its work, and presents recommendations from the industry participants. The report will be provided to individual wineries across British Columbia, wine industry associations and other interested parties, and

¹The UBC-KEDGE Wine Industry Collaborative is held over 2 days in November of each year. It provides an opportunity for debriefing and questioning by not only wine producers but also all others with an interest in the industry.
federal and provincial ministries and departments responsible for wine labelling and wine industry policy.

**TASK FORCE OBJECTIVE AND COMPOSITION**

Setting up the task force was first proposed and agreed to at the April 2015 UBC-KEDGE Wine Leaders Forum\(^2\) by the participant winery owners and principals from diverse segments of the industry. It was then incorporated into the UBC-KEDGE Wine Industry Collaboration project *Position the British Columbia Wine industry for International Growth*, supported by Western Economic Diversification.

The terms and composition of the task force were discussed and agreed to by participants at the November 2015 UBC-KEDGE Wine Industry Collaborative. The complete Terms, including the objective, composition and principles are included in Appendix A: Terms of Reference and Composition. The Terms were circulated to the BC wine industry along with the call for participants; they were also circulated to those industry members who attended the town halls that were held as part of the task force activities (as outlined below).

**OBJECTIVE**

As described in the Terms of Reference and Composition, the purpose of the task force is “to provide recommendations about labelling and label architecture, including the specification of origin on labelling, for all wines that are produced by wineries in BC, both those containing 100% BC grown grapes and others, for the purposes of growing international and domestic markets.”

(The labelling task force established as part of the UBC-KEDGE project was acknowledged to be separate from, and complementary to, the BC Wine Appellation Task Group. The latter has

\(^2\) The annual UBC-KEDGE Wine Leaders Forum was established in 2014. Held over 4 days in April each year, the Forum is designed to offer a safe, yet challenging retreat-style arena for discussion of the wine industry’s strategic concerns. It brings together winery owners and principals, international wine management expertise, government representatives, and other concerned parties.
published a statement that while of interest to the industry, International-Canadian blend (ICB) wines were not in the scope of the Appellation Task Group, and ICB wines, among other issues, may be discussed by a group facilitated by UBC-KEDGE.3)

COMPOSITION

The task force comprised volunteers from wineries across BC. Owners or principals able to reflect a winery’s perspective and approach were encouraged to volunteer, via email invitation sent out to the UBC-KEDGE distribution list. The target was to select up to 15 industry participants, with representation from large (3), medium (4) and small (6) wineries; an additional 2 seats were allocated to ensure geographic representation if needed.

12 participants were selected: 6 small winery participants volunteered, so all were selected; 4 participants from medium wineries were randomly selected from the volunteers; and the 2 volunteer participants from outside the Okanagan were selected to ensure geographical representation. No participants were put forward from large wineries; however, ongoing discussions with them resulted in the task force being offered access to information and research. The 3 seats allocated to large wineries were kept open for them, should they choose to join at a later date. See Appendix B for the list of task force participants.

As described in the Terms, in addition to winery participants, Roger Sugden - Dean of UBC’s Faculty of Management - was chair, and Jacques-Olivier Pesme - Director of the Wine & Spirits Academy, KEDGE Business School, Bordeaux - was advisor. The UBC-KEDGE project team provided additional support for information collection, dissemination and logistics.

TASK FORCE ACTIVITIES

The task force held meetings in November, December, January and March. Participants attended by telephone or in person. At these meetings the group agreed to the terms of reference put forward by industry participants at the November 2016 UBC-KEDGE Wine Industry Collaborative. They also organized themselves into sub-groups to consider chosen aspects of labelling, and communications to winery and other industry stakeholders. Further, they determined a process for engagement across the industry for sharing information and gathering feedback.

LABELLING FOCUS

Through discussion, the task force confirmed that statements of origin on labels were of particular interest to them. Furthermore, industry participants wanted to understand the regulations governing origin statements, both provincially and federally, to learn about existing international standards, and to review other work completed in Canada on this subject.

To this end, the UBC-KEDGE project team prepared and circulated a backgrounder for the task force which includes a review of the scope of the British Columbia Wines of Marked Quality regulation, a summary of key Canadian Food Inspection Agency (CFIA) guidance on origin terms for wine and products other than wine, and an overview of the Organisation of Vine and Wine International Standards. The backgrounder is provided in Appendix C: Backgrounder on Labelling Requirements for Origin Statements.

COMMUNICATION OF TASK FORCE WORK

At the January meeting the task force reviewed the key information. Participants wanted to disseminate findings as they pertained to regulations across the industry, so as to share the knowledge and gauge response to the material, and to collect input to be considered for the development of recommendations. It was determined that holding town hall meetings would
be the best way to reach industry representatives, and that findings should also be presented at the 2016 UBC-KEDGE Wine Leaders Forum.

TOWN HALLS

6 town halls were scheduled for the week of February 29th to March 4th as follows:

<table>
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<tr>
<th>Date/Time</th>
<th>Location</th>
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<tbody>
<tr>
<td>Monday, February 29</td>
<td>Kelowna</td>
</tr>
<tr>
<td>2:30pm - 4:00pm</td>
<td>Okanagan Regional Library</td>
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<tr>
<td>Tuesday, March 1</td>
<td>Osoyoos</td>
</tr>
<tr>
<td>10:30am - 12:00pm</td>
<td>Walnut Beach Resort</td>
</tr>
<tr>
<td>2:30 pm - 4:00pm</td>
<td>Penticton</td>
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<tr>
<td></td>
<td>Penticton and Wine Country Chamber of Commerce</td>
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<tr>
<td>Wednesday, March 2</td>
<td>Webinar</td>
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<tr>
<td>2:30pm - 4:00pm</td>
<td></td>
</tr>
<tr>
<td>Thursday, March 3</td>
<td>Duncan</td>
</tr>
<tr>
<td>10:30am - 12:00pm</td>
<td>Cowichan Green Community</td>
</tr>
<tr>
<td>Friday, March 4</td>
<td>Keremeos</td>
</tr>
<tr>
<td>2:30pm - 4:00pm</td>
<td>The Grist Mill</td>
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Invitations were sent to the UBC-KEDGE distribution lists for wineries and others with an interest in the wine industry. The task force requested that industry associations promote the town halls to their members.

For the purposes of the town halls, the pertinent information on origin statements for labels that had been collated into the above described and appended backgrounder document was distributed to all town hall attendees. The backgrounder was also distributed widely to the
industry following the town halls, with an invitation to provide written feedback via email. In addition, for the town halls the UBC-KEDGE project team created and delivered a presentation summarizing the information in the backgrounder and providing an overview of the WD supported project.

In total, 40 individuals attended the town halls, including representatives from 27 wineries (not including task force participant wineries). Other attendees included consultants, and representatives from BC winery associations and the provincial government.

2016 UBC-KEDGE WINE LEADERS FORUM

The town hall presentation was adapted (the overview of the WD supported project was removed, and themes from the town halls added) and presented on April 5 at the 2016 Wine Leaders Forum. Additional feedback was gathered from Forum participants, to inform task force recommendations.

SUMMARY OF FINDINGS

The following is a summary of the findings collated in the backgrounder document that was provided to the industry at the town halls and via email. The full document is included in Appendix C.

BC REGULATIONS

The Wines of Marked Quality regulation (currently part of the Agri-Food Choice and Quality Act, which will be replaced in 2018 by the Food and Agricultural Products Classification Act⁴) outlines criteria for the use of geographical indications for BC wine. BC wine regulations do not cover internationally blended wine that is produced in BC, nor do they regulate the use of

the “Cellared in Canada” statement on labels. The Canadian Food Inspection Agency (CFIA) provides federal guidelines in these areas.

**FEDERAL REGULATIONS AND GUIDANCE**

CFIA defines the terms Product of Canada and Made in Canada, and provides guidance specifically for wine. Country of origin statements are required for wine. The name of the country should be used if the wine comprises at least 75% juice from grapes grown in that country. If it does not, the label must include the names of countries from which the grapes or juice or wine originate.

An additional term is permissible: “as an interim measure, the statement ‘Cellared in Canada by (naming the company), (address) from imported and/or domestic wines’ may also be used as a country of origin statement for wines blended in Canada.” According to a CFIA communiqué to the Canadian Vintner’s Association in 2001, the “interim measure” was agreed to in 1994 by industry associations, grape growers and the CFIA, pending development of a national standard for wine.

**WINE COUNCIL OF ONTARIO**

In 2009, the Wine Council of Ontario Industry Working Group on Label Clarity recommended that CFIA permit the use of “Blended from International and Canadian Wines” in place of Cellared in Canada.

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6Email response to UBC-KEDGE by an officer of CFIA, January 29, 2016.

INTERNATIONAL STANDARD

The Organization of Vine and Wine (OIV) produces an International Standard for the Labelling of Wine, which is a “recommendation” to its 46 member states. The standard specifies that country of origin is compulsory information for wine made from grapes grown and vinified in that country, wine vinified in a different country from where the grapes originated, or wine blended from wines of different countries. Further, for blended wines, “in all cases, the countries must be displayed in decreasing order of the proportions of the assemblage.”

FOCUS OF DISCUSSIONS IN THE TASK FORCE, AT TOWN HALLS AND AT THE UBC-KEDGE WINE LEADERS FORUM

Two fundamental, inter-related points stood out in the task force discussions, at the town halls and at the 2016 Wine Leaders Forum:

1. Participants agreed that accuracy about origin in labelling is crucial for a wine region to be taken seriously on an international level, and that British Columbia needs to meet international standards for stating country of origin.
2. They also expressed a desire to ensure clarity in labelling and to avoid misleading consumers in both international and domestic markets.

Participants emphasized that the interim measure in the CFIA guidance is problematic and could stand in the way of the industry adhering to standards such as that of OIV, of providing clarity in labelling and of achieving global recognition.

As a result of these concerns, the task force recommendations focus on exploring actions regarding the interim measure and joining OIV.

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CONCLUSIONS

The principal conclusion from the task force deliberations is that, if British Columbia wishes to be recognized globally as an international wine region, then it needs to meet international expectations on labelling and geographical origin, and whilst the current CFIA regulations are largely in line with those expectations, the interim measure in the CFIA guidance is not.

Participants in the task force clearly recognize that the task force is made up of very few members of the industry. Accordingly, the aim of the report is to put into the public realm considerations for wider discussion and possible action across the entire industry, if the industry so chooses. Indeed, further action might include industry wide discussions at suitable venues organized by appropriate industry bodies.

RECOMMENDATIONS

The industry members of the task force recommend:

1. That the following options be put to all members of the industry for it to choose amongst regarding the statement “As an interim measure, the statement ‘Cellared in Canada’ by (naming the company), (address) from imported and/or domestic wines’ may also be used as a country of origin statement for wines blended in Canada” in the CFIA guidance on Labelling Requirements for Alcoholic Beverages:
   a. Maintenance of the status quo
   b. Removal with immediate effect
   c. Transition to removal

2. That the industry support the removal of the statement “As an interim measure, the statement ‘Cellared in Canada’ by (naming the company), (address) from imported and/or domestic wines’ may also be used as a country of origin statement for wines blended in Canada” from the CFIA guidance on Labelling Requirements for Alcoholic Beverages
3. In the event that the industry opts for (1)(c), above, that the transition be determined through an inclusive process across all types of wineries in British Columbia

4. That the options be chosen amongst in a recorded vote covering all types of wineries in British Columbia

5. That the industry pursue the possibility of participation in OIV

**POST SCRIPT: INDUSTRY INITIATIVES INDEPENDENT OF THE TASK FORCE**

At the time of writing this report, representatives of the industry and others, independently of the Task Force on Labelling and Presentation organized as part of the UBC-KEDGE project, prior to the release of the task force recommendations, have made calls for the removal of the interim measure, albeit at the initiative of and with support from some task force participants. These calls include:

**OPEN LETTER TO THE BCWI BOARD OF DIRECTORS**

In March 2016, and without the involvement of UBC-KEDGE, a letter requesting that the BCWI support an active campaign for the removal of the interim measure was circulated for wineries to sign at a BCWI town hall.

**UBC-KEDGE WINE LEADERS FORUM OUTCOMES**

As an outcome of the 2016 Wine Leaders Forum, representatives of the 11 participating wineries decided to:

- Request that the BCWI board ask the minister for CFIA to put in place an 18 month sunset period on removal of the interim measure in the CFIA guidance on Labelling Requirements for Alcoholic Beverages - “As an interim measure, the statement ‘Cellared in Canada’ by (naming the company), (address) from imported and/or domestic wines’ may also be used as a country of origin statement for wines blended in Canada” - and in which there will be federal stakeholder industry consultations on application of the existing regulations.
To our knowledge, this request was brought as a motion to the BCWI board meeting on Monday, April 11th, which was carried.

- Draft a letter to MPs Dan Albas and Stephen Fuhr to request that the Library of Parliament create a report on the OIV, to be shared with other like-minded MPs and from which information will be shared with Wine Leaders Forum participants, potentially leading to a request for a full parliamentary committee study.

----------------- ENGAGING THE FEDERAL GOVERNMENT -----------------

On April 12, 2016, and also without the involvement of UBC-KEDGE, MP Michelle Rempel read a statement in the House of Commons, urging the standing committee on agriculture to study the effectiveness and impact of the interim measure. She had submitted a letter to this effect to the Chair of the Standing Committee on Agriculture and Agri-Food on April 11. The letter refers to the likelihood of recommendations to change the interim measure as a result of the collaborative project between UBC and the BC wine industry.

These actions were followed by a Twitter discussion on ‘truth in labelling’ under the #BCWineChat and #ONWineChat threads on April 20.

In addition, three British Columbia winery representatives traveled to Ottawa on April 18, to meet with interested Members of Parliament to request support of the Standing Committee review.

A website, http://truthinlabelling.ca was launched for people to petition the government to end the interim measure. At time of writing, it was not clear how many individuals had signed the petition.

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APPENDIX A: TASK FORCE TERMS OF REFERENCE AND COMPOSITION

Task Force on Labelling and Presentation: Terms of Reference and Composition

Objective

To provide recommendations about labelling and label architecture, including the specification of origin on labelling, for all wines that are produced by wineries in BC, both those containing 100% BC grown grapes and others, for the purposes of growing international and domestic markets

Indicative questions for the task force to consider*

- What, if anything, must be mentioned about origin on labels?
- What, if anything, must be avoided on labels?
- Is it necessary to introduce or reinforce regulations?
- Does compulsory information need to be created?

* The task force through its operation will determine the actual set of questions that it will address

Principles of operation

The task force needs to:
- Engage flexibly with the industry across BC
- Be proactive in engaging with and going to interested parties, e.g. regional associations
- Focus on using reason and evidence:
  – Listen
  – Challenge
- Be committed to reaching consensus, subject to reason and evidence

Process to determine industry participants

- Request volunteers from the wineries across BC to participate in the task force, given the principles
- Volunteers need to be winery owners or principals or those in a position to reflect a winery's perspective and approach
- Select up to 13 participants from industry volunteers:
  – Up to 3 from large wineries
- Up to 6 from small wineries, randomly selected from volunteers
- Up to 4 from medium wineries, randomly selected from volunteers

If the number of volunteers in a size category is less than the number of participants allowed for in that category, select everyone that volunteers.

Volunteers may designate one alternate, who must be specified at the first meeting.

- In addition, Jacques-Olivier Pesme and Roger Sugden may select up to 2 additional participants from the volunteers, at their discretion, if there were otherwise to be an absence of geographical representation

Composition and roles

- The task force will comprise:
  - Up to 15 industry participants as determined by the above selection process
  - Jacques-Olivier Pesme (advisor) and Roger Sugden (chair)
- Ultimate responsibility for report drafting lies with Jacques-Olivier Pesme and Roger Sugden, in accord with the principles

Task force support

- Task force meeting logistics, including providing remote access options, documentation, and information support (collating data, literature reviews, etc. as needed) provided by Kim Buschert (project coordinator)
- Travel funding support for task force participants
- Privileged access to the April Wine Leaders Forum for task force participants

Task force timeline and estimated time commitment

- September 2015 - October 2015 Data collection by UBC-KEDGE project team, including through online surveys and telephone interviews; analysis of data
- 2 and 3 November 2015 Wine Industry Collaborative on labelling and presentation task force
- Week of 23 November First task force meeting (remote or in-person, 90 minutes), to review and confirm terms of reference, and to discuss indicative questions and information collection process
- Week of 14 December Task force meeting (remote or in-person, 60 minutes), to refine indicative questions, set work plan and schedule
• **January 2016 - February 2016** Engagement by the task force across the entire industry, as determined by the task force; for example, small delegations meeting with regional associations, etc.

• **Week of 26 January 2016** Face-to-face meeting of the task force (1/2 day), for task force participants to exchange and deliberate initial findings

• **Week of 29 February 2016** Meeting of the task force (remote or in-person), to exchange findings and consider initial draft recommendations for inclusion in report

• **March 2016** Initial draft of task force report produced

• **April 2016** Initial draft of report discussed at Wine Leaders Forum

• **May 2016** Final report disseminated for action across the industry

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**APPENDIX B: LIST OF WINERY TASK FORCE PARTICIPANTS**

Evelyn Campbell, Blasted Church Vineyards  
Spencer Massie, Clos Du Soleil

Ezra Cipes, Summerhill Pyramid Winery  
Sandra Oldfield, Tinhorn Creek Vineyards

Penelope Furt-Roche, Roche Wines  
Severine Pinte, Le Vieux Pin Winery/Lastella Winery

Andy Gebert, St. Hubertus & Oak Bay Estate Winery  
Joanna Schlosser, Niche Wine Company

Andy Johnston, Averill Creek Vineyard  
Bruce Schmidt, Intersection Estate Winery

Curtis Krouzel, 50th Parallel Estate  
John Skinner, Painted Rock Estate Winery
APPENDIX C: BACKGROUND ON LABELLING REQUIREMENTS FOR ORIGIN STATEMENTS

LABELLING REQUIREMENTS - ORIGIN

Backgrounder

Prepared by the Task Force on Labelling and Presentation
For the purposes of industry consultation
February 2016
Labelling Requirements for Origin Statements: Backgrounder

1. Introduction and Purpose

This backgrounder is intended to summarize British Columbia legislation, federal regulations and international standards relating to labelling of wine, specific to statements of origin. This document will be used for discussion purposes by wineries, grape growers and other interested industry participants. The Task Force on Labelling and Presentation, set up as part of the UBC-KEDGE led project, *Position the British Columbia Wine Industry for International Growth*, supported by Western Economic Diversification, will gather comments and suggestions from industry participants. These will be used to inform recommendations which will be provided by the task force to federal and provincial ministries and departments responsible for wine labelling and wine industry policy, as well as to wine industry associations.

2. British Columbia Legislation

   a. BC Wine Act

   The BC Wine Act was repealed on April 29th 2011, and has been replaced by the Agri-Food Choice and Quality Act under which the Wines of Marked Quality Regulation falls. Wine labelling requirements for BC VQA and BC wines of distinction are covered within this regulation.

   b. Agri-Food Choice and Quality Act

   Part 1 (section 3) of the Agri-Food Choice and Quality Act outlines its “Quality Programs” and the guidelines around prescribed words on labels. The section states a certificate holder “may use a prescribed word, name, phrase, symbol, label, mark or form of packaging, in accordance with the regulations and any conditions attached to the certificate, to describe, identify, label, advertise or market the person’s agri-food product.”

   The regulation referred to is the Wines of Marked Quality Regulation, which is an agri-food quality program, and the certificate mentioned is either a practice standards certificate for
wineries, and/or a wine quality certificate for wines. The Act itself doesn’t comment any further on wine labeling as this information is contained within the regulation.

c. Wines of Marked Quality Regulation

Section 27 of the Wines of Marked Quality Regulation outlines the criteria for use of geographical indications for BC Wine, and Section 28 covers specific geographical indications and their use.

To use ‘British Columbia or other BC geographical indications, wine must consist of 100% BC grapes. To use indications other than British Columbia, i.e., Golden Mile Bench, 95% of the grapes must be from the Golden Mile Bench.

In November 2015, the BC Appellation Task Group released its report, which includes recommendations regarding changes to the Wines of Marked Quality regulation. New sub-appellations and requirements for recognition as BC wine are part of the recommendations.

The Wines of Marked Quality regulation does not cover the use of ‘Cellared in Canada’, nor does it offer indications for internationally blended wine that is produced and sold in BC. Label indications for these wines fall under federal guidelines regulated by the Canadian Food Inspection Agency (CFIA).

Sources:


3. CFIA Labelling Requirements

   a. “Made in Canada” and “Product of Canada”

According to the Canadian Food Inspection Agency (CFIA), there is a definite distinction between the terms “Product of Canada” and “Made in Canada.”

In order for a food item to be labelled “Product of Canada,” virtually all of its ingredients have to be Canadian. For wine to be labelled a “Product of Canada” it has to consist of at least 75% Canadian grapes and/or juice.

*Made in Canada* is essentially something that has been changed into a new product in Canada with contents obtained elsewhere, or a combination of Canadian and foreign products with a manufacturing connotation.

*Product of Canada* is something that contains ingredients from Canada. For something to be labelled a product of Canada, the percentage of foreign ingredients has to be insignificant (less than 2%).

The guidelines defining these two terms were established in 2008, to “help Canadians make informed choices about the products they are purchasing,” whether they are looking for products with significant amounts of Canadian ingredients, or if they want to know their purchase has been produced to Canadian standards.

Furthermore, to promote consistency, using these two terms is preferred over other terms. However, other terms such as “Roasted in Canada,” “Packaged in Canada,” “Distilled in Canada” or “Processed in Canada” are permitted, “provided that they are not false or misleading.”

Use of these terms is optional - but once used, the product must meet the conditions of the guidelines.

Country of origin for wine is covered under mandatory labelling requirements for specific products.
b. Country of Origin for Wine

A “clear indication of the country of origin” is mandatory for wine labels.

To claim to be “of a country,” the wine must meet one of two conditions. From the labelling requirements:

a) the wine is made from at least 75% of the juice of grapes grown in that country and it is fermented, processed, blended and finished in that country, or

b) in the case of wines blended in that country, at least 75% of the finished wine is fermented and processed in that country from the juice of grapes grown in that country.

If the above conditions for country of origin are NOT met, the label must “describe the various origins,” for example:

- “Made in Canada from (naming the country or countries) grapes (or juices)” or
- “Blended in Canada from (naming the country or countries) wines”

An additional declaration is allowable, “as an interim measure”: the statement “Cellared in Canada by (naming the company), (address) from imported and/or domestic wines” may also be used as a country of origin statement for wines blended in Canada.

The interim measure allowing the Cellared in Canada declaration was added in 1994, and was approved by industry associations, grape growers and the CFIA. The purpose of this statement was to meet the mandatory labelling requirements, until a National Standard of Canada was developed.

As of a 2001 CFIA communication to the Canadian Vintners’ Association, the standard had not yet been completed; therefore, the interim statement remained in effect (email response to UBC-KEDGE by an officer of CFIA, Jan. 29, 2016). At time of writing for this backgrounder, no Canadian standard covers wine labels. The standard, CAN/CGSB-177.1-96 included label requirements, but has been withdrawn.
In 2009, the Wine Council of Ontario Industry Working Group on Label Clarity recommended that CFIA permit the use of “Blended from International and Canadian Wines” in place of Cellared in Canada (Wine Council of Ontario, 2009).

Sources:


4. International Organisation of Vine and Wine (OIV) - International Standard for Labelling Wines

The OIV consists of 46 member states from around the world. It produces resolutions, technical standards, best practice guidelines, statistics and analyses, which are available through its website, www.oiv.int.

The International Standard for the Labelling of Wines, 2015 edition is “a recommendation from the OIV to the Member States. Its aim is to ease international exchange and to ensure fair information to consumers” (OIV, 2015).
The standard’s General Measures section states, “Labelling must include compulsory information to which optional information can be added.” Furthermore, it forbids any content relating to origin that is misleading. (OIV, 2015).

Section 2.5 specifies that country of origin is compulsory information for wine made from grapes grown and vinified in that country, wine vinified in a different country from where the grapes originated, or wine blended from wines of different countries.

Section 4.7 covers how the country of origin may be presented.

- For blended wines: “blend of wines from...”
- For wine vinified from grapes of another country: “wine produced in ... from grapes harvested in...”
- Comparable phrases may be used for the above.
- However “in all cases, the countries must be displayed in decreasing order of the proportions of the assemblage.”

Sources


Wine Council of Ontario, Improving Clarity for the Consumer, 2009
Appendix 1: Summary of “British Columbia as a Wine Territory: Catalyzing Shared Understanding of its Identity”

**PROJECT SUMMARY**

The wine industry in British Columbia (BC) has a major economic impact - approximately 300 wineries contribute over 10,000 jobs and $2 billion to the province. Yet this impact would be significantly greater if the wine region did not suffer from a lack of territorial cohesion, i.e. little sense of being a wine territory with its own identity. To help address this issue, our overarching goal is to mobilize both research and industry knowledge relevant to the development of BC as a wine territory, so as to catalyze shared understanding of the territory’s identity

This will be achieved through a visual exhibition that showcases knowledge about how people in the industry perceive themselves and their relationships with each other, their relationships with the land and wider environment, and other distinct features of BC as a wine territory. The exhibition will be presented in wineries and a public library, and be complemented by a series of public talks. There will also be poster displays in libraries across the province, aimed at fostering widespread engagement amongst the industry, citizens and visitors to the region.

The project is a collaborative endeavour amongst academic researchers at the University of British Columbia (UBC), KEDGE Business School (Bordeaux, France) and Open University (UK), and wineries and libraries in BC. Exhibition materials include photographs, artefacts, and other visual representations that reflect both academic research on the BC wine industry, and the perspectives of winery owners and other individuals and organizations associated with the industry.

The exhibition will be presented in three phases. Phase I is at the 2017 UBC-KEDGE Wine Leaders Forum, which is a retreat for British Columbian winery owners and principals that will be hosted in April 2017 as part of a $1.3 million initiative supported by Western Economic Diversification Canada, intended to help BC emerge as a globally recognized wine region. In Phase II, for the period June-August 2017, the exhibition will be dispersed to 4 wineries in BC (that are confirmed). Phase III will see the exhibition re-assembled in September-October 2017 at the Penticton Public Library (also confirmed). As the exhibition moves across the phases, it is expected to grow organically by incorporating new perspectives and contributions from the industry and the wider public. Outputs include a digi-essay, conference presentation and journal paper, and further dissemination will be achieved through social media, partner networks, industry associations, and the existing UBC-KEDGE website.

The project will provide a space for dialogue amongst multiple actors, strengthening channels of communication, critical reflection, collaboration and shared understanding across the BC wine industry, and between academic researchers, industry and the community. The outcomes include student training and skill development through mentoring.

We expect that everyone experiencing the project will gain understanding of the approachability and relevance of research, therefore of the role of universities in impacting their region. This understanding will lead to new and enhanced partnerships across the different audiences. The exhibition is the communicative medium that represents research on regional socio-economic development. This medium makes knowledge accessible and engaging to a wider set of audiences, stimulating them into dialogue. Thus our project will create a flow of knowledge among multiple stakeholders, enhancing territorial cohesion and impacting economic and social development.
## PARTICIPANTS

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### Appendix 2: Occupations workshop attendees 2016-2017

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Tentative attendees for June 10, 2017 workshop:

Patricia Roy - Department of History, University of Victoria  
Ross Hickey - Irving K. Barber School of Arts and Sciences, UBC’s Okanagan campus  
Eric Li - Faculty of Management, UBC’s Okanagan campus  
Keith Sugden - Cambridge Group for the History of Population and Social Structure, University of Cambridge, UK  
Malida Mooken - Faculty of Management, UBC’s Okanagan campus  
Marcela Valania - Faculty of Management, UBC’s Okanagan campus  
Jordan Coble - Sncawips Heritage Museum, Westbank First Nation  
Roger Sugden - Faculty of Management, UBC’s Okanagan campus  
Mary Butterfield - Faculty of Management, UBC’s Okanagan campus  
Ian Pooley – Okanagan historian  
Paul Davies Irving K. Barber School of Arts and Sciences, UBC’s Okanagan campus  
Jack Wilson – undergraduate student (UBCO)  
Cristalle Smith – undergraduate student (UBCO)  
Tom Velk – Department of Economics, McGill University  
Mengyue Zhao – McGill University  
Heather Berringer – UBC Okanagan library  
Chris Hives – UBC archives
Appendix 3: summary of “The History of Occupations of Okanagan First Nation Men and Women”

The central objective of this project is to undertake pilot research on the history of occupations of Okanagan First Nations men and women in the late nineteenth and early twentieth centuries. This pilot work will be done in partnership with Westbank First Nation, and will support the development of a SSHRC Insight Grant on the topic of the relationship between occupational structure in the Okanagan region and planning for future economic development to be submitted in October 2017. This grant will support one full-time graduate student, and will result in a minimum of two co-authored journal articles.

Occupational structure refers to the distribution of people across different economic activities in the labour force, relationships among activities, and how each is supported and altered through local and remote knowledge, labour markets, cultural change, and public policy (Sugden and Sugden, 2016). Occupations matter because what people do is fundamental to their wellbeing (Sen, 1985), and because economic activity in general is reflected in how people are occupied in particular (Markusen, 2004; Koo, 2005). More specifically, knowledge about the history of occupational structure might be a catalyst for citizens to think about an economy’s future development, and might enable citizens to build that future (Moozen and Sugden 2016). Previous research on Canada’s economic history at the sub-national level typically considers the city or province as the unit of analysis (Coe and Emery, 2004; Emery and Levitt, 2002; Emery and Kneebone, 2008; Hickey and Jacks, 2011; Inwood et al., 2014). In contrast, this project focuses on occupations in a previously neglected, non-metropolitan region – the Okanagan – and in particular aims to work with an historically marginalized population.

This project draws on the research approach developed by the Cambridge Group for the History of Population and Social Structure at the University of Cambridge, UK (e.g. Shaw-Taylor and Wrigley’s ongoing study of the occupational structure of Britain, 1379-1911, at the country, urban, local and rural levels; Shaw-Taylor, 2017; Wrigley, 2010). According to that approach, notable sources of knowledge on occupations are quantitative data and oral histories, as well as complementary material such as archive photographs and paintings. This project proposes to excavate and analyse primary data on the historical occupations of Okanagan First Nations men and women. This data includes but is not limited to the 1881-1921 Canadian censuses, and the 1913 Royal Commission on Indian Affairs in British Columbia. It is important to appreciate, however, that each of these records is problematic. Most notably, they are extremely poor in reflecting the actual occupations of First Nations peoples (Sugden and Sugden, 2016). As a result of the incomplete quantitative records, it will be important to consult the archives and existing oral histories at the Westbank First Nation Sncəwips Heritage Museum.

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1 http://www.campop.geog.cam.ac.uk/research/projects/occupations/abstracts/
Appendix 4: summary of WD application on Clean Flight

Consortium for Clean Flight and Remote Access (CCFRA): Summary

Key activities: The central goal of this project is to identify a plan to grow clean flight technology opportunities for western Canadian organizations in the marketplace. “Clean flight” encompasses zero-emission aerospace activity, from the development of zero-emission unmanned aerial vehicles (UAVs) currently underway at UBC’s Okanagan campus, to the creation of electric helicopters and hybrid passenger jets, currently a major focus in Germany. This 12-month project proposes a comprehensive year-long study involving market intelligence, innovative cluster growth, export possibilities, and community needs assessment, as well as the development of a consortium of stakeholders who will lead the development of clean flight industry and markets in western Canada. This study will result in a roadmap that will lay out a plan for growth of the western Canadian economy. This is expected to focus on two areas. The first, and primary focus of the study, is on identifying the opportunities for the production, use, sale, and export of clean flight technology on the global market. The secondary focus of the study is to identify the potential for use of these technologies to grow the economies of western Canadian rural and remote communities by providing increased access to resources and supplies. The Consortium for Clean Flight and Remote Access (CCFRA) will create capacity in BC’s interior to contribute to the development, building, and operating of zero-emission aerial vehicle technology, policy development and social structures.

Project plan: The proposed project will run from September 1, 2017 to September 1, 2018 and will focus on the two primary objectives of building a consortium of stakeholders around clean flight and remote accessibility, and conducting an analysis to identify how to grow clean flight opportunities within Western Canada. Achieving these objectives will require successful completion of the following secondary objectives:

1. Establishing UBC’s Okanagan campus as the R&D hub for clean flight in Canada.
2. Working in partnership with Western Canadian industries and international partners to develop agreement on the content and design of next steps.
3. Conducting a needs assessment for rural and remote areas and communities in Western Canada, including the opportunity cost to develop the first generation of zero-emission unmanned aerial vehicles (UAVs) for the delivery of various cargo.
4. Developing a detailed 5-year project plan for the UBCO consortium’s contribution to the global challenge of clean flight and the local opportunity for delivery of essential services and cargo to remote communities.

Project milestones:
September 2017: Initial workshop to allow emerging stakeholder group to identify key areas of focus for the study.
September 2017 – September 2018: Study to identify opportunities to establish, develop and grow the industry around clean flight technology. Study will include market intelligence, stakeholder engagement, and cost analysis. Draft report to be delivered May 2018 and finalized September 2018.
May 2018: Consolidate relevant stakeholders around draft report and formalize roadmap for technology development and industry growth.

Key outcomes: Clear plan for growth of the development, commercialization, and production of clean flight technology that will: 1) surpass the current marketplace standard; 2) increase the training and employment of HQP in western Canada; and 3) increase the opportunities for SMEs and other organizations to pursue an international research and development opportunity.
The clean flight initiative represents an emerging approach at UBC’s Okanagan campus that focuses on the development and deployment of technology with a concern for shaping and impacting the regional socio-economic development of rural and remote communities. Drawing broadly from all Faculties on the Okanagan campus, the approach brings together expertise in (inter alia) critical sustainability, rural health, remote service delivery, municipal planning, data science, economics, engineering, chemistry and management. In doing so, it aims to bridge both UBC campuses, providing opportunities for faculty based in Vancouver to develop their research in unique circumstances.

The emerging cluster on socio-technical change and regional socio-economic development has coalesced around the clean flight initiative as an opportunity to develop and apply a novel interdisciplinary approach. Central to this approach is the engagement of communities, municipalities, First Nations government, industry, and other relevant stakeholders in the co-creation of research priorities. The initiative is being driven with faculty across the Okanagan campus, and has the support of all Okanagan campus Deans. It is a focus for developing relationships across universities in the BC Interior, notably with UNBC, and has at its core developing international relationships with leading European institutions - Deutsche Luft und Raumfart Institutes (German Aerospace Research Institutes, DLR) and Delft University of Technology, Netherlands (DUT).

The clean flight initiative is at the intersection of key research interests across the Okanagan campus. The term “clean flight” encompasses zero-emission aerospace activity, from the development of zero-emission unmanned aerial vehicles (UAVs) currently underway in the Okanagan, to the creation of electric helicopters and hybrid passenger jets, currently a major focus of our partners in Germany. The clean flight initiative draws upon relationships with DLR and DUT regarding the development of clean flight technology in Europe, and the manufacturing and deployment of such technology in Western Canada and beyond. During 2017-2018, the project team involved in the clean flight initiative aims to build a multi-stakeholder consortium, as well as conduct a 12-month study identifying opportunities to establish, develop and grow an industry around clean flight technology in Western Canada. The study will rely on the production chain established by DLR with regard to the development of a small, regional electric plane, and will include market intelligence, stakeholder engagement, and cost analysis.

This initiative is housed within the Regional Socio-Economic Development Institute of Canada, and relies centrally on expertise in Management, Engineering, Chemistry, Nursing, and Economics. The project team submitted an application for funding to Western Economic Diversification Canada in February 2017, and intends to apply for an NSERC Connect to fund a workshop in fall 2017. A proposed cohort of post-doctoral fellows under the broader cluster initiative of socio-technical change and regional socio-economic development will contribute to the longer-term goals of the clean flight project once the multi-stakeholder consortium has been established.

The clean flight initiative enables UBC’s Okanagan campus to develop work in a number of areas, such as:

- Regional economic development opportunities for a new, high-value industry with value-added job creation
- Public policy development
- Sustainability and environmental monitoring and modeling
- Urban planning and design
- Computer simulation and digital twinning
- Research based design, new materials, propulsion systems, etc.
- Concepts based in consumer and customer research
- Advanced manufacturing, industry 4.0, computer simulation and modeling
The proposed project will create an open source Community-University portal at the University of British Columbia’s Okanagan campus. The portal application and source code will be fully license-able using the MIT License to other university campuses and organizations. The Community-University portal will facilitate access and relationship building between Universities and their constituent communities, allowing for the exchange of ideas and initiatives that will support collaborative research projects and experiential learning opportunities.

The Community-University portal will provide a virtual community entry point with the purpose of directly supporting collaboration. The portal will be an interface between the University and the community that will allow for two-way interaction. Community members and organizations will use the portal like a virtual library service desk, posing questions and problems. Some of these questions may lead to new research relationships, while some may support experiential learning opportunities. The portal will be constructed in the spirit of community-based research, where the community drives the process and method of engagement – posing questions and problems around which relationships can both coalesce and grow. The collaborations and partnerships that result from the portal will provide unique opportunities for both community-engaged research and transformative student learning for faculty and students.

This project will benefit the UBC Okanagan campus community, as well as the wider Okanagan community. Many post-secondary institutions have non-academic units dedicated to “community engagement”; the Vancouver and Okanagan campuses of UBC are no different. However, these offices focus on ensuring that the University is able to reach the community; holding public events, and building relationships based on donor, student recruitment, or research needs. There is currently no mechanism that allows communities to reach into the university, nor to provide direction to faculty, staff, and administration on the research needs of the community. The Community-University portal will act as such a mechanism, providing a way for community members to access the University on their own terms.
RSEDIC Seed Grant – Spring 2017 Competition

The purpose of the RSEDIC seed grant is to provide funding to support new areas of regional socio-economic research, and to increase the capacity for regional socio-economic inquiry on campus. Activities undertaken through the seed grant can include for example knowledge syntheses, and/or the collection of pilot data on a new topic. Applicants are encouraged to explore new research questions relevant to regional socio-economic issues that may arise out of existing or on-going research projects. Interdisciplinary applications that address the connections between regional economic development, health, arts, culture, and/or technology are especially encouraged, as are applications that push the boundaries of what is traditionally understood as socio-economic activities. Seed grant applications that can demonstrate a clear path for further development of the proposed project will be given priority. Successful applicants will be required to submit a short report on their progress and participate in a RSEDIC workshop in the fall of 2017. Successful Vancouver applicants are encouraged to discuss arrangements for the workshop with RSEDIC.

Value and duration: Grants are for up to a maximum of $3500 over 6 months. No extensions are available.

Eligibility: The RSEDIC seed grant is open to all full-time tenure-stream faculty in the professorial stream on both campuses of UBC. Up to two awards may be granted to applications led by Vancouver-campus PIs. Faculty can only submit one application as primary applicant, but are able to be co-applicants on multiple applications. The applicant shall have, at the time of application for the funding, a term of appointment spanning the period of funding, or a signed commitment for a term of employment spanning the period of funding. Applicants who have any overdue final reports for internal funding, holds on their accounts or any other issues outstanding with the Office of Research Services on either campus at the time of application are ineligible.

Eligible expenses: The RSEDIC seed grant funds should be used to support a research assistant (UBC student or post-doctoral fellow). Up to 25% of the total award may be used for travel for research purposes if the collection of data is required for the seed grant project. Only expenses outlined in the original application are eligible for reimbursement. The purchase of non-disposable research equipment and/or travel to discuss or disseminate research are not eligible expenses under this program. Eligible use of funds is based on the tri-agency financial administration guide:

Evaluation: The applications will be evaluated by an inter-disciplinary committee of UBC Okanagan researchers, and chaired by the Director of RSEDIC who will receive and approve as final decisions by the committee. Evaluation will be based on the following criteria:
1. A statement of goals, project overview, significance/impact of the project. A clear statement of the relevance of the proposed project to regional socio-economic development is required. 50%
2. A clear work plan for undertaking the proposed work, as well as next steps for the project. 25%
3. The excellence of the researcher. 25%

**Grant Administration:** Individual PGs (research accounts) will be established for each grant-holder. Expenditures against this PG will be processed through the grant-holder’s Faculty/Unit office. No additional funds will be made available during the grant term.

**Term of the Grant:** The term of each award is May 1 – November 15. No extensions will be granted. At the end of the grant term any unspent funds will be returned to the source PG.

**Research Ethics:** If the research study in the application requires review and approval by one of the UBC’s Research Ethics Boards (i.e. Behavioral, Clinical, Animal or Biohazard), ethics approval must be obtained within six weeks of the award date or the grantee will forfeit the award. Applicants who plan to conduct human participants research for a new project that does not have ethics approval are encouraged to consult with Lisa Shearer, of the Okanagan BREB (lisa.shearer@ubc.ca) prior to submission of the application regarding their timeline.

**Reporting:** A final report must be submitted to the Okanagan campus Office of Research Services no later than six weeks after the end of the award term. Failure to submit reports will prevent consideration of subsequent RSEDIC grant applications.

**Acknowledgements and copies of research/creative output:** Recipients of the RSEDIC seed grant should acknowledge having received the award in any publication or creative work made possible as a result of being funded. By accepting the award, successful applicants agree to participate in a RSEDIC-supported news story for publication on the RSEDIC website and external circulation. If applicable, a copy of any publications or creative works funded by the award should be forwarded to the Director of RSEDIC.

**How to apply:**

Prepare all required attachments and submit to the Okanagan campus Office of Research Services by 4pm on April 18, 2017. Applications may be submitted hardcopy to Fipke 336 or electronically to Candace Martyn (candace.martyn@ubc.ca). All applications must be accompanied by a completed Research Project Information Form. The applicant, the applicant’s Department Head, and the Dean/Associate Dean of Research must sign the RPIF.

**All attachments must be:**

- Word processed on 8 1/2 x 11” single-sided white paper, 3/4” margins
- Single-spaced, 12 pt Times New Roman font
- Principal Applicant’s name must appear in the top right corner of every page
Proposal Sections:

1. Abstract of Proposed Project: Provide a 100-word summary of your research proposal. If successful, abstracts will be used in RSEDIC publications.
2. Project Description: Provide a one-page description of your research proposal. The description should include research methodology and anticipated research contribution and impact. If your proposed project arises out of an existing or on-going research project, please attach a one-page summary of the project.
3. Budget Justification: Provide a budget justification for the funds being requested (1/2 page maximum). See eligible expenses, above.
4. UBC CV or CCV

Funding contact: Mary Butterfield (mary.butterfield@ubc.ca)