

**CONFORMITY AND DISTINCTIVENESS IN A GLOBAL INSTITUTIONAL
FRAMEWORK: THE LEGITIMATION OF ONTARIO FINE WINE**

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Abstract

The study investigates how local actors pursue two paradoxical aspects of legitimacy in a global institutional framework: the need for global conformity and the need for local distinctiveness. Drawing on the notion of glocalization, it explicates how this pursuit is accomplished by actors' selective fidelity to global norms and adaptation of these norms to local conditions. The empirical work consists of a five-year qualitative case study of the Ontario wine industry. It provides empirical evidence for the presence of several non-mutually exclusive paths through which local actors seek legitimation in a global context. The study offers important implications for future research on legitimation and globalization.

Keywords

[legitimation, globalization, glocalization, institutions]

Globalization is a cultural and institutional phenomenon rather than a purely economic one (e.g., Campbell, 2004; Djelic and Quack, 2008; Fligstein and Mara-Drita, 1996), and scholars have increasingly turned attention to the institutional processes that constitute globalization.

Institutional scholars have made important contributions to this research area by examining the role of transnational institutions and networks in driving globalization (Djelic and Quack, 2008), and exploring how various institutionalized practices and ideas travel from one country to another (Sahlin and Wedlin, 2008). More broadly, institutional ideas have informed research in international management (Hillman and Wan, 2005; Kostova and Roth, 2002; Orr and Scott, 2008) and complemented entrenched realist perspectives on globalization (Drori, 2008), as well as prompted institutional scholars themselves to expand their analyses beyond geographically limited conceptualizations of organizational fields (Wooten and Hoffman, 2008). As a result, some researchers have suggested that sensitivity to globalization may prompt a reconsideration of a number of established institutional constructs, such as isomorphism (Kostova, et al., 2008), decoupling (Tilcsik, 2010), and institutional logics (Lok, 2010), among others.

In this article we seek to examine how the legitimation process, though often seen as local, might be impacted by globalization. Extant research has tended to conceptualize organizational fields, industries and geographically proximal communities as forming and maintaining a socially constructed system of local norms, values, beliefs, and definitions (Wooten and Hoffman, 2008) used to ascertain legitimacy. However, legitimacy judgments might be made not only within a local framework, but also a global one (e.g., Khaire and Wadhvani, 2010; Vaara and Fay, 2012), prompting actors to negotiate both local and global institutional norms (Marquis and Battilana, 2009; Robertson and White, 2007), as they seek to

reconcile the dual pressures for conformity and distinctiveness (Amis and Silk, 2010; Kostova, et al., 2008).

Our key argument is that actors in a particular field must fit with the expectations of audiences whose judgments might be influenced by not only local but also global institutional norms (e.g., Campbell, 2004; Ritzer, 2007a). This exacerbates the challenge of ‘optimal distinctiveness’ in the interplay between the local and the global (Alvarez, et al., 2005; Kostova, et al., 2008), whereby local actors seek to manage two paradoxical facets of legitimacy: show conformity to established global rules that are considered the standard against which local practices are judged, and demonstrate that their practices are genuinely local and distinctive, rather than merely derivative of the global ones (Campbell, 2004; Czarniawska and Joerges, 1996; Navis and Glynn, 2011). We suggest that this duality of conformity to and distinctiveness from the global institutional norms does not represent two ends of the same continuum (i.e., either global or local), but instead manifests itself through a process of ‘glocalization’ (Robertson, 1992; Robertson and White, 2007), defined as ‘the interpenetration of the global and the local resulting in unique outcomes’ (Ritzer, 2003, p. 193). Thus global and local elements are combined in the pursuit of legitimacy which involves both conformity and distinctiveness.

Our argument is elaborated through an inductive case study of the Ontario wine industry, in which we examined the industry’s efforts to legitimize Ontario fine wine within a global framework through a judicious adoption and adaptation of global institutional norms. The paper begins with a brief review of the literature on legitimation, with a focus on distilling implications from institutional studies of globalization for the understanding of this process. We then present our case study of Ontario wine industry and conclude with implications for future studies of legitimation processes and those of globalization.

LEGITIMATION AND GLOBALIZATION

Legitimacy is ‘a central concept in organizational institutionalism’ (Deephouse and Suchman, 2008, p. 49), and it encompasses the ‘generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions’ (Suchman, 1995, p. 574). However, as Barley (2008) observes, institutional scholars ‘have written more about sources of legitimacy, about whom or what bestows it, than about how it is bestowed’ (p. 506), and the process of legitimation thus remains poorly understood.

Legitimation: Conformity and Distinctiveness

Recently, legitimation work, or ‘doing legitimacy’ (Barley, 2008), has received increased empirical and conceptual attention – either in its own right or as a part of studies on innovation and entrepreneurship. For example, scholars have highlighted the importance of theorization in legitimizing innovations (Birkinshaw, et al., 2008; Svejenova, et al., 2007) and deviations from the norm (Lounsbury and Crumley, 2007). Others have identified the important roles of storytelling (Lounsbury and Glynn, 2001; Martens, et al., 2007) and identity work (Goodrick and Reay, 2010; Reay, et al., 2006; Wry, et al., 2011) in legitimation.

Although conformity with the most fundamental rules of the field is essential for an entity to be legitimized (De Clercq and Voronov, 2009; Hargadon and Douglas, 2001), and that has been the aspect of legitimation that has received the most research attention, a degree of deviance or distinctiveness might be necessary or beneficial as well (Kjærgaard, et al., 2011; Navis and Glynn, 2010; 2011). This might be especially true for new firms (De Clercq and Voronov, 2009; Martens, et al., 2007) or nascent fields (Navis and Glynn, 2010; Reinecke, et al., 2012; Wry, et al., 2011), that must demonstrate that they deliver something ‘new’ and ‘uniquely valuable’ in

order to be legitimate. Although distinctiveness is often associated with identity, rather than legitimacy, identity claims are subject to legitimation as well (Gioia, et al., 2010; Glynn and Abzug, 2002; Ravasi and Schultz, 2006), and the conceptual divide between the notions of legitimation and identity work has been reduced considerably (Glynn and Dacin, 2000; Goodrick and Reay, 2010; Wry, et al., 2011). Thus fields tend to value both conformity and distinctiveness when bestowing legitimacy on actors (Clegg, et al., 2007; Cliff, et al., 2006; De Clercq and Voronov, 2009; Lounsbury and Glynn, 2001; Navis and Glynn, 2011), and empirical studies should be mindful of both of these facets of legitimation.

Legitimation and Globalization

Prior legitimation research has tended to investigate legitimation in the context of local frameworks, whereby the standards and notions used for legitimizing entities are believed to be shaped by geographically bound local communities or fields (Marquis and Battilana, 2009). However, institutional norms might be simultaneously local and global (Khair and Wadhvani, 2010; Vaara and Fay, 2012). Thus, whereas actors might experience institutional norms as 'local' and geographically bound, these norms are often local *interpretations* of foreign or global ones (Czarniawska, 2002; Ritzer, 2007a; Zilber, 2006). Accordingly, the notion of *glocalization* (Ritzer, 2003; Robertson, 1992; Robertson and White, 2007) acknowledges that 'little of the local remains that has been untouched by the global. It is either shaped by the global or its nature is altered by the fact that it is reacting against it. Thus, much of what we often think of as the local is, in reality, the glocal' (Ritzer, 2007a, p. 31). Glocalization acknowledges both the inescapable nature of globalization and a significant degree of agency, expressed through actors interpreting, adapting, and modifying foreign institutional norms and practices (e.g., Ansari et al, 2010; Campbell, 2004; Sahlin and Wedlin, 2008). Czarniawska's (2002) study of Warsaw,

Stockholm and Rome, for example, utilizes the notion of glocalization to demonstrate how the three cities adapted the global 'European ideal' of urban planning differently. Elsewhere, Drori's (2008) review of the spread of global culture, acknowledges glocalization manifesting in the diverse appropriation of global culture in different contexts. The acknowledgement that practices and institutional norms are modified as they are translated from context to context (e.g., Sahlin and Wedlin, 2008) also reflects glocalization.

We suggest that these two paradoxical facets of legitimation discussed above – conformity and distinctiveness – might be negotiated within an institutional framework that is not local, but rather *glocal*. We posit that an unexploited contribution of the notion of glocalization is that it can help elucidate different facets of the legitimation efforts by local actors as they seek to conform to global norms and leverage their local uniqueness, resulting in the interpenetration of the local with the global (Czarniawska, 2002; Frenkel, 2008; Ritzer, 2003) in the course of their day-to-day practices. Thus, in order to be legitimate, local actors must demonstrate the conformity of their field with the cardinal rules of an established global framework (Perren and Jennings, 2005; Polillo and Guillén, 2005; Tsutsui and Shin, 2008) by adopting global practices with requisite fidelity (c.f., Ansari, et al., 2010), while also demonstrating that they are utilizing these practices in unique and distinctive ways and are not merely copying or imitating foreign practices (Campbell, 2004; Lok, 2010; Sahlin and Wedlin, 2008). Glocalization then redirects the research attention from classifying things as either global or local toward a more nuanced examination of how the global-local relationship is constituted and negotiated on an ongoing basis (Ritzer, 2007b), through a putatively local process, such as legitimation.

The research question that guides this research is: *How do actors who seek to legitimize their actions within a global institutional framework manage the pressure to conform to global institutional norms while also exploiting the distinctiveness of their locale?*

METHODS

Research Setting

Wine industries are excellent settings to study institutional processes, because fine wine production takes place in a highly institutionalized environment. It encompasses interactions among a variety of actors (e.g., wineries, critics, retailers, restaurateurs, and popular press), and standards of wine production are reinforced through all three pillars identified by Scott (2008). With respect to the regulative pillar, there are formal laws and regulations (that vary to some extent from region to region) that specify what grapes are allowed in wine (Johnson and Robinson, 2007), how wine should be produced and labeled (Zhao, 2005), and there are a number of bodies overseeing, and in some cases enforcing, these laws and regulations. With respect to the normative pillar, there are norms and standards that, despite some variation from region to region, establish proper winemaking and quality of wine (Robinson, 2006). Finally, with respect to the cultural-cognitive pillar, there are taken-for-granted assumptions about what makes some wines better than others, and wine producers and critics play important roles in shaping these perceptions (Beverland, 2005; Colman, 2008). Legitimation in wine industries involves demonstrating compliance with a variety of global institutional norms enshrined in these pillars. Wine regions around the globe exhibit important similarities in adhering to these pillars (e.g., most define vinifera grapes as the only appropriate winemaking material), but there are also considerable differences with respect to the ways in which these pillars manifest themselves in a particular region (e.g., does a particular region specialize in more or fewer of

these grape varieties?). The interplay between global conformity and local adaptation that is salient in wine industries around the world (Colman, 2008; Robinson, 2006; Ulin, 2004) makes glocalization an important feature of these industries.

Our research site is the Ontario wine industry whose evolution over the last 200 or so years and especially its transformation since 1988 is tied closely to globalization. Of the approximately 140 wineries operating in Ontario currently, the largest concentration is located in the Niagara Peninsula. Although winemaking in Ontario dates back to the early 1800s (Phillips, 2004), many attribute the birth of fine winemaking in Ontario to the founding of Inniskillin Winery in 1975 (Frank, 2008), because that was the first winery to commit itself fully to adopting European winemaking practices and norms. Nowadays, the earlier history is widely seen as illegitimate (Phillips, 2004; Schreiner, 2005).

The industry has been strongly impacted by the forces of globalization, as the most pivotal period in the industry's history is believed to be the 1988 Free Trade Agreement with the United States that exposed Ontario wineries to increased foreign competition that threatened to destroy the Ontario wine industry (Aspler, 2006; Ejbich, 2005; Silliman, 2007). As Schreiner (2005) writes: 'In a free trade environment, wine made with De Chaunac or Verdelet simply could not compete with imported Cabernet Sauvignon or Chardonnay' (p. 11). But the treaty is also credited with prompting the industry to institutionalize fine winemaking in accordance with global institutional norms. This was done by uprooting the illegitimate labrusca grapes, such as Concord, not traditionally used in winemaking in Europe but that had dominated the Ontario wine industry because of their cold hardiness and resistance to disease, and instead, replacing them with vinifera grapes, such as Riesling, Chardonnay, and Pinot Noir, which are seen as appropriate for fine winemaking in accordance with global institutional norms (Aspler, 2006).

Since then, the industry has focused on producing what is understood internationally as high-quality fine wine, and since the early 1990s – and especially in the 2000s – the number of wineries in Ontario has grown exponentially. Figure 1, for example, shows the growth of wineries producing VQA (denomination of origin designating 100% Ontario wine) from 2001 onward. Many Ontario wineries have since then earned major international awards and garnered critical acclaim from the noted British critic Jancis Robinson and the prestigious U.S.-based *Wine Spectator* magazine, among others. As of March 2011, the industry’s annual production reached 15,567,070 liters of VQA wine with a retail value of \$287,791,117 (VQA Ontario, 2011). The most famous and the most commonly exported Ontario wine product is Icewine,¹ which comprised 689,376 liters. The main export destinations for Ontario wine include the US, China, South Korea, and the UK, among others. In sum, Ontario wine industry has grown to be an important contributor to Ontario’s economy, but has remained relatively small.

INSERT FIGURE 1 ABOUT HERE

The industry is an excellent setting for our research for two reasons. First, the industry is suited to the study of globalization of institutional phenomena. The recent history of the Ontario wine industry is significantly impacted by the institutional and economic forces of globalization, such that in order to be competitive against foreign wines, the Ontario wine industry has had to produce fine wine in accordance with the global institutional norms. Rooted heavily in ‘Old World’ (i.e., Europe) and, more recently, ‘New World’ (i.e., California, Australia, etc.) traditions (Robinson, 2006; Ulin, 2004), these institutional norms are foreign to Ontario. Thus, the fairly recent and still ongoing adoption and adaptation of these global institutional norms in Ontario

makes glocalization salient and relatively easy to apprehend, as actors are still aware of the relative 'foreignness' of many of these institutional norms.

Second, the industry is suited to the study of legitimation. As Figure 1 illustrates, our data collection (that focused on the period between 2007 and 2012 but also encompassed archival data going back to the mid-1980s) covers a period of particularly rapid growth in the number of wineries and the increased acclaim of Ontario wine. The presence of so many new firms in the industry and the relative youth of the industry itself (as pertaining to *fine* wine) make legitimation efforts more salient (Deephouse and Suchman, 2008). Further, the efforts to institutionalize fine winemaking in accordance with global institutional norms have been ongoing for about 25 years, and considerable progress had already been made. However, because Ontario wine does not yet enjoy universal acceptance domestically, and the industry is just starting to make concerted efforts to gain international recognition, it has not reached the taken-for-grantedness that indicates legitimacy (Deephouse and Suchman, 2008). Thus, the extent to which actors either conform to or seek to modify the global institutional norms and standards are highly salient in this period, as they continue their efforts to legitimize Ontario fine wine.

Data Collection

We draw on a five-year qualitative field-level study that encompasses 81 semi-structured interviews, 300 hours of observations, and the examination of over 4000 pages of documents.

Given our interest in understanding how wineries and other actors sought to legitimize Ontario wine, an inductive qualitative study was deemed necessary (Creswell, 1998).

Sampling procedure. Our primary sample consisted of 16 Ontario wineries. Table I provides more information about the wineries and the type of data obtained. We started with three wineries (a small, a medium and a large). Following that, we used our respondents'

recommendations to approach other wineries. The sampling was meant to ensure that the wineries varied on important characteristics including age, size, ownership type, level of commercial success, and quality reputation, because each of those factors could potentially play roles in the way each winery sought to legitimize its activities and Ontario wine in general.

Because our interest was in theory building, we sought out as much variance as possible.

INSERT TABLE I ABOUT HERE

Interviews. We conducted semi-structured interviews with a total of 34 winery representatives. Each interview averaged about 1.25 hours and was tape recorded and later transcribed. We asked respondents questions about their understanding of what high quality winemaking involved, how their wineries sought to comply with those norms, and how they sought to communicate about their practices with important audiences. We also asked the respondents questions about the history of their wineries and of the industry as a whole. A total of 54 such interviews were conducted, as several people were interviewed on multiple occasions. This was due, in part, to the changed focus of our research, as we discuss in more detail below, with more interviews being necessary with some respondents. In other cases, multiple interviews were necessary due to the changes happening at some of the wineries. For example, throughout the course of the study Niagara Estates was undergoing a major organizational change initiative, and we sought more interviews with its proprietor in order to better understand these changes.

To supplement these formal interviews, we engaged in informal conversations with the interviewees and other winery employees on multiple occasions throughout our fieldwork. These conversations often occurred while the interviewees performed their routine work, which gave them the opportunity to reflect on their situated activities (Schon, 1983).

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Because critics play crucial roles in wine industries (Colman, 2008; McCoy, 2005; Roberts and Reagans, 2007), we conducted one-hour semi-structured tape-recorded interviews with eight wine critics; 12 such interviews were conducted. We sampled different kinds of critics (two writing for national publications, one for a regional publication, two for wine magazines, two for wine blogs, and one freelance writer). In addition, because our early interviews and reading about the wine industry highlighted the importance of prestigious restaurants in enhancing the legitimacy of wines, we conducted semi-structured, tape-recorded interviews with seven and informal conversations with ten high-profile restaurateurs and sommeliers. We sampled restaurants mostly from Toronto because that city is reported to be the most challenging market for Ontario wineries due to intense competition from foreign wineries, which allows us to understand better the challenges faced by wineries in their attempts to produce legitimate wines in relation to international competitors. For contrast, we also included two restaurateurs based in the Niagara wine region, which is believed to be more receptive to Ontario wine.

We complemented the insights gained from these three key actors (wineries, wine critics, and restaurants) with interviews with other relevant actors. We interviewed a representative of the Wine Council of Ontario, a trade group that represents most of Ontario's wineries, and two representatives of the Grape Growers of Ontario, the trade organization that represents the interests of the grape growers who supply Ontario wineries. In addition, we interviewed one senior representative of the Ontario Wine Society, a non-profit club that offers social and educational events aimed at promoting Ontario wines. The last group of interviewees was from the Liquor Control Board of Ontario (LCBO), which is responsible not only for overseeing liquor sales and distribution in Ontario, but also functions as the main distribution channel for both domestic and foreign alcohol distributors seeking market access in Ontario. We conducted

one-hour semi-structured interviews with four LCBO executives. All of the above groups of respondents were helpful in getting third-party insights into specific wineries and information about the industry as a whole, including its history and its current challenges.

Observations. A comprehensive understanding of legitimation efforts is advanced by attending to both language and material practices (Barley, 2008). Accordingly, we observed a variety of staff meetings, planning sessions, staff training sessions, winery open houses, grape harvesting, winemaking, and other activities at several wineries. We also shadowed one of the wineries' sales representatives as he visited client restaurants to observe how the winery manages its client relationships and convinces restaurateurs to add wines to their wine lists. In addition, we regularly observed the retail and other staff members as they conducted their routine work in the wineries' retail stores. Finally, we attended and observed industry group meetings, workshops, and presentations. These observations amounted to about 300 hours. In all cases, we took extensive notes during or immediately after the observations.

Documents. Documents were a very important source of data for this study. In order to grasp how wineries communicate to their customers, we compiled the e-mail newsletters of 32 wineries. Of the 16 wineries in our main sample, 12 maintained e-mail newsletter lists which we included in our sampling of newsletters; we included 15 other wineries of various age, size, and ownership structure in order to facilitate more comparisons and contrasts. Further, we routinely monitored the 31 wineries' web sites (all of them had web sites). These electronic modes of communication were a crucial data source. Newsletters represent an important way for wineries to stay in contact with their customers, while websites enable wineries to project particular images to both consumers and other audiences. As such these sources offer important insights into how wineries go about legitimizing Ontario wine on a day-to-day basis.

To understand wine critics' efforts for legitimizing Ontario wine, we compiled their articles in newspapers and on web blogs. We also examined various historical writings on and historical accounts of Ontario wine industry (e.g., Aspler, 2006; Bramble, 2009; Ejbich, 2005; Phillips, 2004; Rowe, 1970) about the industry written by some of the most influential Canadian critics. In addition, we compiled general news coverage of the industry and of individual wineries from local, national, and international newspapers and web blogs as well as various reports released by various groups.

Data Analyses

Evolution of the theoretical frame. We utilized inductive, grounded theory methodologies (Corbin and Strauss, 2008) to develop theory. We analyzed the qualitative data iteratively by traveling back and forth between the data and emerging theory (Corbin & Strauss, 2008). Globalization was not our original research focus when we started the data collection. Instead, our aim was to understand how wineries responded to conflicting institutional pressures. In addition, while one of the authors was somewhat familiar with the functioning of wine industries at the outset of the study, two other authors were novices to wine business and its institutional norms. This made it necessary for them to conduct extensive readings about the wine business, its history, norms and conventions and immerse themselves in the 'wine culture'.

This vicarious learning through reading and direct learning through participant observation activities played a key role in the reshaping of the study's focus. The self-conscious attempts among actors to comply with global institutional norms that the authors encountered presented itself as a 'mystery' (Alvesson and Kärreman, 2007) that warranted further investigation. The authors' relative inexperience with the wine culture facilitated defamiliarization (Alvesson and Deetz, 2000), whereby the authors were able to question why

particular institutional norms, that appeared to be foreign to the focal field, were accepted and taken-for-granted. Thus, we began to search for a framework that could help us make sense of how actors appeared to struggle to build legitimacy within a global framework. The notion of glocalization was deemed useful in sensitizing us to the processes by which local actors sought to adopt and adapt global institutional norms and standards and to use them in the course of their efforts to legitimize Ontario wine.

Analytic procedure. Figure 2 summarizes our data structure. Over the course of the fieldwork and data analysis, we generated a list of activities through which the various actors attempted to legitimize Ontario wine. We focused both on discursive activities as well as on material practices (e.g., non-verbal behavior in relation to consumers, physical artifacts, etc.).

Initially, our analysis was mainly inductive and descriptive, based on interviewees' own accounts, our observations, and the information found in the newsletters and on the websites. For example, we noted some of the ways in which winemakers sought to highlight the rigor of the winemaking process during the winery tours, or the descriptors that were used by wineries in their newsletters in order to portray their activities in a positive light.

Next, we developed second order concepts that aggregated the first order activities into broader and more generalizable categories. For example, we noticed that some practices represented actors' attempts to adopt global winemaking practices as accurately as possible, rigidly conforming to the global institutional norms (e.g., emphasizing that Ontario winemaking practices conformed to established global winemaking traditions and/or different from the now-illegitimate winemaking practices of the past). We also noticed that some other practices represented clear local adaptations of the global practices (e.g., utilizing unusual grape varieties or using innovative winemaking techniques).

Finally, we examined how the second order categories reflected actors' pursuit of conformity and distinctiveness. We found that conformity was pursued via global fidelity, or faithful adoption of global practices, and also via shielding local adaptations or validating them as being in line with what other wine regions do. Distinctiveness was pursued via local adaptation, or emphasizing the uniqueness of local practices, and also via accurate adoption of globally accepted practices of how distinct local elements can be leveraged.

INSERT FIGURE 2 ABOUT HERE

We ensured the trustworthiness of the data in several ways. First, all data were carefully managed using NVivo qualitative data management software. Second, we continually triangulated the multiple sources of data (Tilcsik, 2010), comparing and contrasting across the different sources to validate that a particular practice could be ascertained either through multiple forms of evidence (e.g., interviews and observations) or through multiple instances of the same form of evidence (e.g., multiple interviews). We pursued not only patterns but also exceptions and interrogated these exceptions for novel insights. For example, the theme about the repression of the local history (discussed below) was first made salient to us when one respondent pointed out that Ontario's history of winemaking is longer than what most of the actors would like to claim. We then explored this surprising insight further (c.f., Alvesson and Kärreman, 2007). When disagreements emerged either among the sources or between the authors with respect to the assignment of data to particular categories, we re-examined the data to understand the reasons for the differences until a consensus was reached. In addition, we periodically presented preliminary findings to various actors to test the accuracy of our understanding of field dynamics

(Lincoln and Guba, 1985). We explored disagreements through additional data collection to assess whether the emerging theory needed to be modified (Alvesson and Kärreman, 2007).

FINDINGS

Our findings suggest an intricate relationship between legitimacy and glocalization.

Although it was expected that actors in Ontario wine industry would pursue both facets of legitimacy – demonstrating conformity with global institutional norms while leveraging local opportunities (e.g., Alvarez, et al., 2005; Beverland, 2005) – it was interesting to find two paths through which this duality was accomplished. On the one hand, we found that actors sought to attain legitimacy by fitting Ontario wine as accurately as possible into the mold of the global institutional norms – in essence imposing those norms onto themselves. On the other hand, they sought to modify some of the global institutional norms and use them in a more flexible manner.

Most interestingly, we found that the more intuitive combinations of means and ends of legitimation efforts (i.e., conformity through global fidelity and distinctiveness through local adaptation) were complemented by less expected combinations (i.e., conformity through local adaptation and distinctiveness through global fidelity). Below we first present the more intuitive combinations, followed by the more surprising ones.

Demonstrating Conformity through Global Fidelity

Possibly the most salient aspect of the wineries' efforts to legitimize Ontario wine is a steadfast insistence on compliance with and mimicking of internationally accepted standards of fine winemaking and distancing the region from the pre-1988 winemaking practices that are widely seen as illegitimate. This legitimation approach involves tacit privileging of foreign knowledge, norms and practices, using them as hidden referents and reproducing the construction of Ontario wine industry as a recipient, rather than creator of practices and

knowledge. We labeled these legitimation efforts as conformity through global fidelity (Table II), because the objective is to demonstrate conformity with the global institutional norms through replicating the associated global institutional practices as accurately as possible, thereby assuring audiences that Ontario wine is ‘world class’.

INSERT TABLE II ABOUT HERE

Demonstrate continuity with global traditions. The notion of ‘quality’ is defined, both implicitly and explicitly, in global rather than indigenous terms, including a commitment to internationally accepted grape varieties (e.g., Pinot Noir, Chardonnay), an emphasis on internationally accepted grape growing practices that emphasize low yields, ripeness, and optimal levels of sugar, and winemaking techniques that utilize particular kinds of yeasts, barrels, and so on, as well as on control mechanisms. This is illustrated, for instance in the following quote from an address delivered by an oenologist in reference to the adoption of VQA (appellation of origin) system:

They [Ontario wineries] were not about to blaze a trail. They needed to import credibility to sell to consumers. VQA is based on all the best aspects of well-established and respected systems from around the world (e.g. AOC, DOC, etc.). Proven systems were incorporated so that the system would have some basis for respect among wine producers and consumers. This provided the basis for a key factor – credibility.

The VQA system, which includes a panel that assesses the quality of wine before it can be approved to carry the ‘VQA’ label, has had both positive and negative sides. Although, it provides credibility to the industry and is an important legitimating mechanism, some winemakers argue that it also makes experimentation somewhat difficult, as some more experimental wines are sometimes reported as having difficulty passing the panel. Thus it

functions as a disciplining mechanism that encourages compliance with accepted global norms, rather than experimentation and the development of a unique style.

However, much of the legitimation work performed by wineries, critics and restaurateurs is subtle and accomplished through routine narratives that characterize wineries' grape growing and winemaking methods as traditional, old fashioned, or world class and as such, an accurate representation of the institutionalized global practices. This can be seen, for example, in the following quote from a winery's newsletter in which it announces the release of a new sparkling wine: 'The wine is predominately pinot noir with some chardonnay and syrah. It was produced following the traditional method where it is fermented in the bottle and left on the lees for 14 months prior to disgorging.' This narrative offers information about the winemaking process that is immediately recognizable to wine consumers familiar with Champagne, appealing to established global institutional norms. Many such descriptions also emphasize the hands-on and laborious winemaking, reinforcing that wine is an agrarian product, and wineries attempt to convey that their methods of grape growing and winemaking are the same as those in the established wine regions.

The alignment with global traditions is also apparent in the resulting wines often being described in terms that highlight their similarity to those from established wine regions. In so doing, they demonstrate compliance with global quality standards as well as orient the audience toward making relevant comparisons to a more familiar wine region. This approach is illustrated by the following quote from a wine critic: 'It was un-categorically pure pinot, remarkably similar to Burgundy.' Similarly, some restaurateurs who are particularly supportive of the industry sometimes 'trick' loyal customers who are resistant to trying Ontario wine by claiming to bring a sample of Ontario wine in addition to the one ordered but passing the sample off as something

else (e.g., Burgundy). The wine is then revealed as being from Ontario, once the customer expresses approval of the wine. In a slight variation of this technique, a restaurateur might claim to bring the wine the customer ordered (e.g., a Burgundy) while actually giving the customer a similar Ontario wine and inquiring afterwards whether the customer liked it.

Such characterizations assure the audiences more familiar with foreign wines that a particular wine will conform with their expectations. Although the intention of such legitimizing narratives is to normalize the less well known Ontario wine, they also reproduce the construction of wines from more established regions (e.g., Bordeaux, Burgundy, etc.) as the ‘gold standard’ against which Ontario wines are to be judged. And wines from these regions and their common characteristics are institutionalized as privileged vocabularies.

However, at times these legitimizing narratives may have an unintended impact of making Ontario wines less appealing to some audiences by setting up wrong expectations and characterizing Ontario wines in a manner that does not accurately reflect their taste profile. For example, one wine critic observed the danger resulting from wineries characterizing their wines as similar to the more popular Australian wines:

We will never have the big easy, you know, comfortable style of wines that the Aussies can make because we don't have that kind of climate. So if we want to compete against them, the very first thing we have to tell-- let people know is that what we have are alternatives. We have wines that are really good but they're different in style.

During the course of our study we observed an increased consensus emerging with respect to the ‘appropriate’ referents to be used for orienting consumers, with critics increasingly insisting on and encouraging wineries to follow the more Burgundian and German grape varieties, winemaking style, wine profiles and descriptors and discouraging the Californian or Australian referents. For example, an annual festival celebrating Cool Climate Chardonnays from a variety of cooler climate countries (e.g., New Zealand), alongside Ontario, was launched.

Repudiate illegitimate local history. Another crucial manifestation of attempts to demonstrate conformity with global institutional norms through fidelity is by distancing Ontario's current winemaking practices from the history of illegitimate winemaking. Not only does this facet of legitimation involve privileging global norms, standards and knowledge but it also involves active attempts to repress local history, and by extension, knowledge and expertise. For example, the aforementioned eradication of the labrusca grape varieties (such as Concord), that thrived in and were dominant in the region until 1988, is widely celebrated as a turning point that signaled a commitment to quality winemaking. As one winery proprietor observes: 'So with the swipe of a brush, labrusca was taken out of-- which was the positive thing for the industry. Even though farmers complained and it was going to be the end of the whole growing [...]. But I think that was a turning point and they realized that we were serious.' Some wineries even tie their founding stories to this breakage with the illegitimate local tradition and embracing the legitimate global tradition. For example, Countryside Winery tells the following story on its web site:

In 1984 when our father, along with each of us [...], tore out the Concord and Niagara grapes at our own expense, people thought we were crazy. When we planted Riesling and Chardonnay under newly contoured hills and under drainage, many said they would never grow. We knew [...] that our vineyard was not only suitable for these special varieties but also located on the prime grape growing lands.

Wineries and other actors have long emphasized how far the industry has removed itself from such practices as making sweet wines from labrusca grapes or cheap low quality (by global standards) sparkling wines that used to be commonplace in the region, as illustrated by the following quote by a winery manager: 'And we're quite a ways from where we were, say, 15 or so years ago when the primary reputation for the industry was built around products like Baby Duck [a sweet sparkling wine made from labrusca grape varieties].' This suppression of the

illegitimate history is also reflected in the fact that although the building where Brights Wines, Canada's second oldest commercial winery (founded in 1874), still exists, it has not been made into a tourist attraction and has not been preserved. Thus, although history of winemaking in Ontario dates back to early 1800s (Phillips, 2004), industry insiders often cast the industry as 'young' and twenty-to-thirty years old (depending on whether they start at the founding of Inniskillin in 1975 or Free Trade in 1988). For example, Norm, the retail manager at Future Vineyards observed: 'And so you would almost think that the Canadian wine industry began in 1974 when Inniskillin was given its license. And not very many people are aware that the Canadian wine industry goes back, getting on for 200 years.'

When asked to reflect on such suppression of the local history, some actors acknowledge that the institutional norms are somewhat arbitrary and involve historical accidents, (c.f., Colman, 2008; Ulin, 1995), fashions (c.f., Robinson, 2006) and critics' preferences (McCoy, 2005) in institutionalizing certain winemaking practices and taste profiles as implicit and unexamined standards. Norm, for example, acknowledges this arbitrariness and explains the acceptance of these globalizing institutional norms as follows: 'There's a little bit of insecurity that runs, I think, through the Canadian wine industry. And we feel a little bit of embarrassment where, maybe we don't want to talk a lot about our humble beginnings. We don't want to do anything that's going to make our products seem less world class in the eye of the consumer.'

Highlight world class expertise. Another key aspect of demonstrating conformity with the global institutional norms through fidelity involves demonstrating that winemakers' skills and knowledge reflect accurate understanding of global institutional norms, and that their expertise is 'world class'. In doing so, a great deal of emphasis is placed on the winemakers' foreign experiences or backgrounds, because these presumably allow them more direct exposure

to the legitimate global knowledge and opportunities to ‘prove themselves’ on the global stage. For example, the Terroir Vineyard’s marketing manager characterizes the winery’s winemaker, who previously worked in France, as follows: ‘He’s an incredible winemaker, extremely talented, and the purist, you know, of the sort of real old-school French mindset that it’s all about the grapes.’

In fact, most of the highly acclaimed winemakers in Ontario tend to be either foreign born or Canadian winemakers who have spent time working in an established wine region. This is exemplified by the list of winners of the ‘Winemaker of the Year’ award at the Ontario Wine Awards (one of the two main award ceremonies in the Ontario wine industry: Table III) that we compiled. Awards are an important legitimation mechanism, because giving an award to an individual elevates her actions from merely idiosyncratic to broadly relevant and worthy of emulation. Most of the winners have had significant international experiences. Although this is not a complete listing of high status winemakers in Ontario, the award indicates a high level of recognition and accomplishment within the industry, and the high proportion of winemakers with significant international credentials on the list is indicative of the importance placed on those credentials within the field. It should also be noted that the industry appears to value foreign experiences not only in such established and prestigious wine regions as France or California, but also in emerging wine regions, like New Zealand and South Africa.

INSERT TABLE III ABOUT HERE

Aside from wineries publicizing their winemakers’ foreign credentials on their websites, in newsletters and during conversations with clients, critics and restaurateurs also play important roles in sharing this information. They have access to much broader audiences, and they often

include information about winemakers into their reviews or columns about particular wineries or about the industry as a whole. In a typical example of this, one winemaker is described in a critic's piece as follows: 'Mr. Marchand, born in Montreal but for more than two decades a distinguished winemaker in Burgundy, rose to the occasion.'

Highlighting and promoting locally trained winemakers is also apparent. For example, there is an Oenology program at a local university that has trained a number of winemakers who have achieved critical acclaim for their work with both Ontario and foreign wineries, and their successes and local trainings are highlighted by both wineries and wine critics. For example, one winemaker is highlighted by a critic as follows: "He has been involved in the wine industry since 1997. He is a graduate of the Cool Climate Oenology and Viticulture Institute, with a reputation in the Ontario wine industry for making excellent red wines – noted by numerous awards." These wine producers' training and expertise is legitimated in part through their training by instructors with extensive international experience and in accordance with global norms and standards.

Leverage external validation. A particularly important tool that wineries use to demonstrate conformity through global fidelity are the critical reviews and awards. Great emphasis is being placed among wineries on obtaining external validation – write-ups from foreign critics and awards at international competitions. Such validation relies on putatively more objective or disinterested, knowledgeable and famous foreign authorities to demonstrate that a particular winery possesses legitimate winemaking knowledge, and write-ups and awards are often used as 'haloes' over wineries' whole portfolios, rather than just specific wines that earned those positive write-ups or awards.

Ontario wineries actively court major foreign critics and enter wines in international wine competitions. As one oenology researcher observed, 'They look very much towards Wine

Spectator as being [...] sort of the penultimate recognition for wines and it being linked to [...] having that status and recognition and acknowledgement, as having made it in the North America wine marketplace.'

Wine Council of Ontario uses endorsements from famous foreign critics in the annual guide to Ontario wineries. For example, a quote from the American critic Matt Kramer, a contributor to *The Wine Spectator*, 'Ontario's wines have such a particular beauty', is used on the same page as the map of world's major wine regions to underscore Ontario wine industry's association with other fine wine regions, and Jancis Robinson's praise of Ontario chardonnay is used in the section of the guide that discusses grape varieties in which Ontario excels.

A restaurateur explained the benefits of such international endorsements as follows: 'I think that it's been a benefit because there are individuals out there who swear by the Parker scores or swear by Wine Spectator or Decanter. So getting the name out there internationally, I think has brought people into this area.' Thus, he acknowledges the greater legitimacy of foreign experts and the disproportionate influence that they have in facilitating the legitimization of Ontario fine wine as world class.

Summary. Demonstrating conformity through global fidelity involves efforts to demonstrate belongingness within the global field of fine winemaking (i.e., being world class) by demonstrating rigid adoption of legitimate global norms, standards and practices. This involves the duality of aligning Ontario winemaking with the established global standards and reinforcing that alignment by showing *non-compliance* with the illegitimate winemaking of the past.

Demonstrating Distinctiveness through Local Adaptation

Global institutional norms are often adapted in order to fit with the recipient field and to endow them with a sense of necessary localness and distinctiveness (Campbell, 2004;

Czarniawska and Joerges, 1996; Sahlin and Wedlin, 2008). Although we found a considerable effort to demonstrate such distinctive localness of Ontario winemaking through local adaptation (see Table IV), because of the strong privileging of global institutional norms (discussed above), local adaptation appeared to be less about modification of global institutional norms in substantive ways and more about demonstrating how and why wineries' practices were local and deeply connected to Ontario's future and past. This was done by demonstrating economic and environmental benefits of Ontario winemaking and connecting to Ontario's culture and history.

INSERT TABLE IV ABOUT HERE

Highlight economic benefits. To demonstrate the uniqueness of Ontario fine wine in relation to wine produced in other regions, local actors extensively emphasize the putatively superior economic benefits to the local communities derived from Ontario wine. For example, the Wine Council of Ontario has retained KPMG to study the industry's economic impact on the Ontario economy. After the 2008 study (the first such study done in over a decade), a number of newspapers featured prominently the study's findings.

In doing so, wineries connect to the strong 'go local' sentiment among Ontario consumers and throughout North America. They are using a globally available discourse to position themselves as defenders of the local economy in the face of difficult economic times (Ontario economy has been hit hard by the decline of North American manufacturing). Wineries and other local wine proponents typically emphasize the economic benefits alongside asserting the unique quality of the wine, as is apparent in the following newspaper quote featuring the president of the Wine Council of Ontario, in which she argues that 'buying Ontario wines is not just a matter of good taste but of good economic sense.'

Highlight sustainable practices. Related to the aforementioned ‘go local’ trend in consumption, wineries also try to connect to the consumers’ increased environmental consciousness in order to convey distinctiveness of their locale. At a minimum, they highlight the environmental benefits (e.g., reduced carbon footprint) resulting from drinking local rather than shipping wine across the globe. However, many wineries go beyond that by emphasizing the environmentally sensitive practices through which they produce wine. For example, a number of wineries have adopted biodynamic practices, as explained in Orchard Estate’s electronic newsletter:

Biodynamic agriculture is a very natural, holistic means of growing crops, and focuses on enhancing the life processes of nature [...] the soil is treated as a living organism in its own right and nurtured as such without the use of harmful sprays or chemical fertilizers. [...] Animals also play a fundamental role in helping us achieve both the bio-diversity and self-sustainability of our vineyards.

Biodynamic agriculture is an interesting means to accomplish distinctiveness through local adaptation, because it involves utilizing and adapting a German farming philosophy to maintain the viability of particular Ontario vineyards using the unique agricultural resources available in Ontario (e.g., certain local insects, plants and animals). Furthermore, it enables participating wineries to be more convincing in explaining *how* they work to exploit local elements. During the duration of our study, we noticed increased emphasis on biodynamic and other sustainable practices.

Emphasize local cultural roots. In order to show distinctiveness, wineries also try to tap into the regional history and connect to events of cultural significance. In some cases, they emphasize their families’ generations-long connection to the region. As Countryside Winery’s marketing manager explains:

We're lucky enough to have-- been able to track down some of our family history and that's got some very deep roots in the area and so we tell that story all the time. You know, people do love the story. [...] And people are, you know, somehow think that we're like [...] some sort of Niagara aristocracy or something. But it's-- they're a bunch of hillbillies like everybody else's ancestors were. We just happen to know about them, right, you know. Is there a strange power in that?

In other cases, wineries may attempt to connect themselves to local historical events, as illustrated in the following newspaper article excerpt:

The name of the new Niagara winery Organized Crime. It purportedly refers to a much more gentle antiquated, folksy tale of a feud between Mennonite congregations in Niagara [...] which resulted in one congregation heisting a pipe organ from the other's church and throwing it down an embankment.

Wineries also participate extensively in the various cultural events. For example, some wineries host theater and musical performances during the summer months and get involved in a variety of fine art, theater and film events throughout the year. In doing so, they attempt to partake and embed themselves in the local cultural economy, and leverage such participation to emphasize the unique character of the local industry.

Summary. Demonstrating distinctiveness through local adaptation involves emphasizing the local rootedness of Ontario winemaking. Highlighting the economic benefits and sustainability of Ontario winemaking involves tapping into globally available discourses of 'go local' and 'sustainability' and contextualizing them within Ontario. Emphasizing local cultural roots involves leveraging elements of Ontario culture and history in ways that enhance the distinctive local cultural connection between the wineries and their audiences.

Demonstrating Conformity through Local Adaptation

A surprising path to legitimation involved demonstrating conformity through local adaptation (see Table V). This involved either genuine substantive modifications of global

winemaking practices (experiments or deviations from the norm) that were, paradoxically, cast as traditional and still continuous with the global traditions, or developing local validation systems (e.g., award ceremonies) that essentially constitute domestic methods of applying global standards for assessing quality of Ontario wine.

INSERT TABLE V ABOUT HERE

Shield experimentation and deviations. Conformity with the global institutional norms is also achieved through wineries' relatively more flexible use of tradition to justify and normalize local experiments, innovations and deviations from the global norms. These experiments and deviations take on a number of forms. For example, whereas most wineries do not produce wines from hybrid grape varieties that, along with labrusca, became illegitimate after 1988, several wineries emphasize their expertise in making wines made from Vidal, Baco Noir, and Marechal Foch (all French Hybrids). Vidal, in particular, has been tremendously helpful in legitimizing Ontario fine wine, both internationally and domestically, because it is commonly used to make Icewine, Ontario's most famous export wine product. For example in 1991, Inniskillin was awarded Le Grand Prix D'Honneur at the VinExpo Bordeaux for its Vidal Icewine, the greatest international recognition garnered by an Ontario winery up to that point. Although other grape varieties are used in making Icewine, Vidal remains the most popular grape for that due to its cold hardiness and disease resistance. Icewine, originally a German discovery, is a traditional, and highly prized wine product, but in this case the material used to make it is less traditional.

Meanwhile, Baco Noir and Marechal Foch offer Ontario wineries the opportunity to produce quality red wines reliably, even during vintages that present problems for more internationally accepted reds. The proponents of hybrid grapes argue that the problem with

Ontario wine of the 'old generation' was not the heavy reliance on hybrid grapes but the fact that farmers tended to not follow globally accepted standards of good grape growing and winemaking. They argue that as long as internationally accepted processes are followed, it is possible to produce high quality wines from hybrid grapes. Thus, the making and promoting of wine from hybrid grapes is an aspect of conformity through local adaptation because global norms and standards remain dominant but are modified to make local experiments appear legitimate. One winery successfully sells out its Old Vines Foch at \$25/bottle and during the course of our study has even increased its Foch plantings, and another winery's Reserve Baco Noir (at \$25/bottle) is a bestseller among both general public and fine dining establishments. As one restaurateur explains:

A lot of these wines are difficult sells but if we find that sort of interesting hybrid, let's not be afraid. I mean, our very nature of the country is one of hybridity, you know, we bring in all kinds of immigrants who are welcome and bring with them sensitivities and sensibilities that create the new Canada. And it's constantly changing. And so why not have some hybrids reflected in our winemaking identity as well?

Despite these successes, there is a reluctance among most industry actors to legitimize these grape varieties as deserving a place within the field, and they are not a central part of attempts to legitimize Ontario fine winemaking. An observation made by a noted critic illustrates this point: 'there's no denying Baco Noir is a signature grape of Ontario, but I'd place it back in the runner-up category because the hybrid variety will never hold much export interest.' Another critic argued even more forcefully against the hybrids: 'Hybrids, they grow well and that's fine and, people make wine, and some of them are really good. Some of them are very bad. Hybrids, you know, baco noir, marechal foch [...] if I could, I would rip them off and, you know, plant, you know, noble grapes.'

Pressed to explain why he felt that way, he elaborated: ‘I don’t think that those grapes make like really, really world class wines, let’s be honest. I mean, do you see any baco noir and any marechal foch winning any international wine competition in the next 100 years?’ James, the proprietor of Niagara Estate similarly reflected: ‘even when I was-- 35 years ago, planting French hybrids, I took them all out because I figured what the rest of the world is doing, if we’re not doing what the rest of the world is doing, we’re never going to compete.’ As the winery underwent significant organizational change during the course of our study, it continued to struggle to decide what to do with its Vidal (hybrid plantings). On the one hand the owners felt tempted to continue producing inexpensive entry-level wines (at \$12/bottle) from them, but on the other hand they worried about the stigma the winery might suffer in some consumers’ eyes as a result of using these grapes.

In all, this ongoing debate over the appropriateness of using hybrid grapes makes clear the reliance on global norms, standards and definitions of what is legitimate wine, and the quotes illustrate Ontario winemakers’ and critics deference to the global institutional norms. The global institutional norms with respect to how grapes should be grown and how wine should be produced are internalized and taken-for-granted, but there is contestation over whether or not some degree of modification to those norms – with respect to the raw materials used – should be allowed. The debate then represents contestation over how much local adaptation is acceptable in order to safeguard perceptions that global standards are not violated.

Another aspect of conformity through local adaptation is apparent in some wineries’ attempts to promote their takes on less popular vinifera grape varieties that seem to thrive in Ontario. These efforts are less controversial than the usage of hybrids, and they involve experimentation to find a globally accepted though distinctive Ontario style for such grapes and

thus to legitimize the region as a competitive global player. Because these are globally accepted vinifera grapes, these experiments are still couched in the legitimate winemaking tradition. For example, a number of producers have developed acclaimed versions of Gamay Noir (a varietal most closely associated with the Beaujolais region of France). As one winery explains in its electronic newsletter: 'While other reds may vary year to year in flavour and intensity, Niagara Gamay makes reliably delectable wine, in spite of weather variations. It is a grape you can count on.' Whereas the French version tends to be light-bodied, Ontario wineries have been able to produce more full bodied and concentrated versions. In fact, one winery even developed its own clone of the grape. Several such efforts have enjoyed domestic and international critical acclaim. One winery's Gamay is on the list of Fat Duck, in London, one of the world's top restaurants.

Yet another example of conformity through local adaptation is apparent in some wineries' use of Canadian oak barrels to ferment and/or age wine. Most Ontario wineries use French or American oak barrels, with presumably better French oak barrels being used for the most special wines – a practice consistent with global standards. As Robinson (2006) explains, in the global context, since 19th Century, French oak has 'become the standard by which all other oaks are judged.' One winery proprietor even explained that the \$4 price difference between two of the wines was attributable to the use of French oak one the more expensive one and American oak on the cheaper one. However, a number of Ontario wineries have experimented with Canadian oak, with considerable critical acclaim. This constitutes conformity through local adaptation because traditional winemaking techniques are followed but an unusual or unique locally available material is used to endow wine with a more unusual and unique profile.

Importantly, all of the above instances refer to the practices whereby traditional methods and rhetoric about such methods are used to shield and normalize these experiments and

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deviations from the global institutional norms. Critics play an especially important role in establishing the parameters of acceptable local adaptation, as we see with respect to the controversial use of hybrid grapes (not endorsed by critics) versus the experimentation with a more distinctive style of Gamay (endorsed by critics).

As noted above, foreign critics are especially influential in legitimizing Ontario wineries' activities and choices, as apparent in Niagara Estate's experimentation with Canadian oak barrels, as explained by the marketing manager:

We have a small program where some of our wines every year are put into Canadian oak barrels, does not get a lot of play. And why? Because the Canadian wine writers off the bat decided they didn't like it that much. And which wine did Jancis Robinson [famous British wine critic] like? The Canadian oak cab franc. So now all of a sudden Canadian wine writers are saying things like, 'They seem to have worked out some of the bugs,' and stuff like that. Because it was different and it was Canadian oak so they-- and I honestly think it's psychologically based but, 'Oh, it's Canadian, it can't be any good,' you know. If it was a good wine, they'd put it in French oak or something like that.

This incident illustrates that it is not only wineries, but also domestic critics, that are captured by the assumption that foreign critics are more legitimate arbiters of expertise and defer to their judgments, thus imposing global standards onto themselves.

Leverage local validation. The aforementioned tendencies to defer to global experts in demonstrating conformity with global institutional norms when relying on local elements are complemented by efforts of establishing domestic means of certifying such conformity. In addition to the great number of Canadian wine critics, who vary in terms of the relative attention they give to Ontario wine, there is a high profile wine magazine, *Vines*, which focuses primarily on the Canadian wine scene. Although the magazine reviews wine from all over the world, its focus is mainly on Canadian wine, and it gives a great deal of attention to Ontario wine in particular. The magazine also showcases a variety of wine regions and among the various

columns appearing in it, the column by famous British wine critic, Jancis Robinson, is featured.

Thus, the magazine signals that it is not myopically focused on Canadian wine and should be taken seriously as a source of legitimate analysis of how local wines compare to foreign ones.

Pursuits of conformity through local adaptation then, are apparent in the way the magazine attempts to provide a more uniquely Ontario perspective on the global wine scene.

In addition to two national wine competitions (Canadian Wine Awards and All Canadian Wine Championships), there are two Ontario wine competitions, the Ontario Wine Awards and The Cuvee. The former is organized by one of Canada's most respected wine critics. The latter is often referred to as 'the Oscars of the Ontario Wine Industry' – in reference to the famous American movie award ceremony – because the wines are assessed (blindly) by a panel of winemakers (though also verified by a panel of wine critics). The awards are highly publicized and receive a substantial amount of media coverage. They constitute another attempt by the industry to create and maintain its own form of validating local adaptation in relation to a global institutional framework because it is based on the global standards and norms yet focuses purely on locally made wine.

Summary. Demonstrating conformity through local adaptation involves essentially attempts to shield or normalize local adaptations and practices that may not be fully consistent with the global institutional norms. Thus, it involves exaggerating the extent of compliance with the global institutional norms. This is not cynical manipulation, but rather, a testament to the perceived rigidity of the global norms that cannot be openly flaunted. Experimentation and innovations have to be shielded from criticism, which is in part accomplished by local initiatives (e.g., magazines and award competitions) that validate deviations.

Demonstrating Distinctiveness through Global Fidelity

Another surprising legitimation path involved attempts to utilize the global institutional norms to show the distinctiveness of Ontario wine. We call this paradoxical path distinctiveness through global fidelity (See Table VI) because it involves attempting to demonstrate superior application of and adherence to the most entrenched and valued global institutional norms.

INSERT TABLE VI ABOUT HERE

Demonstrate terroir-driven winemaking. The salient theme of demonstrating distinctiveness in the wine industry is the emphasis on *terroir* expression, and can be observed in wine industries all over the world (Beverland, 2005). The term ‘terroir’ refers to ‘the relationship between the characteristics of an agricultural product (quality, taste, style) and its geographic origin, which might influence these characteristics’ (Van Leeuwen and Seguin, 2006, p. 1), and is a hallmark of French winemaking tradition (Robinson, 2006). Although there is no equivalent term in English, the terroir philosophy has been adopted by fine wine producers all over the world. As noted American wine critic Matt Kramer (2004) observes, with respect to ‘somewhereness’, his Anglicization of terroir: ‘You can’t fake somewhereness. You can’t manufacture it. Indeed, you can’t even figure out its source. But when you taste a wine that has it, you know. This is what wine lovers have understood since the ancient Romans’ (p. 10).

The international spread, adoption and taken-for-grantedness of terroir implies adopting a philosophy and a set of practices that are rooted in a foreign socio-cultural context. The very notion of terroir was initially deployed to defend the privileged positions of elite Chateaus in France against competition by virtue of having better terroir than others (Ulin, 1995). The evocation of terroir implies distinctiveness through global fidelity, because the notion reflects wine producers’ adoption of the globally adopted practice to express whatever makes a particular

locale unique and different from others. Furthermore, it offers lesser known regions and producers ammunition to claim superior quality of wine by virtue of their ability to spot and express superior terroir (c.f., Beverland, 2005).

In our study we found that terroir philosophy was a crucial tool for demonstrating distinctiveness. The following interview excerpt by the proprietor of Niagara Estate, in which he explains the winery's focus, illustrates this emphasis: 'We think that this little plot of land will have flavors that no other plot will—and we will make it without any manipulation of the wine [...] what comes from the soil will be what the consumer will experience when they come to Niagara Estate [...] we try to convey the flavors that come from the soil.' Like other wine producers we interviewed, James constructed the narrative whereby wine producers toil in the vineyard but let nature dictate what ends up in the bottle – consistent with the age-old imagery prevalent in the global field. This is communicated to the consumers and other audiences in a variety of ways. At a minimum, we found every winery whose web sites we examined emphasizing terroir either explicitly or implicitly. For example, Distinction Estate prominently displays the following quote from its winemaker: 'The measure of a winemaker is not his ability to speak for great vineyards, but rather his faith in the idea that great vineyards can speak for themselves.' This was also a common theme in wineries' newsletters.

During the course of this research, we noticed the terroir emphasis strengthen among Ontario wineries. This was driven by a small number of ambitious start-up wineries that captured critical acclaim through their putatively extremely rigorous terroir driven winemaking, and the publicity garnered by these wineries appears to have encouraged other more established wineries to redouble their efforts in highlighting the terroir driven nature of their winemaking.

Of course the reality of modern winemaking is the utilization of state-of-the-art winery equipment and innovative winemaking techniques that allow wine producers to overcome climatic challenges and produce wines that are different from what the terroir dictates (c.f., Robinson, 2006). It is noteworthy, though, that we found that many wineries tend to hide this aspect of winemaking from consumers. For instance, the winemaker at Falls Vineyards explains that he is comfortable telling customers about farming practices and innovations used in grape growing, but not about the *techniques* of winemaking because the latter likely conveys images of manipulation and tinkering with the grapes, which would clash with the customers' 'romantic notions of winemaking.' This belief is also illustrated by Countryside Winery, where the proprietor tries to avoid allowing customers to see the inside of the 'quite industrial' production facility. Instead, customers tour the vineyards, which he thinks better convey the sense of terroir.

The attempts to explain the unique terroir of different plots are evident in the increased tendency among wineries to produce single-vineyard wines (wines using grapes grown exclusively in a particular vineyard, rather than a mixture of vineyards). Some wineries may release several single-vineyard wines (e.g., Chardonnay) during any given vintage, thereby encouraging the consumer to compare the differences resulting from the geographical variation and different viticultural practices that might be required in those different vineyards. Such emphases on celebrating the uniqueness of different locales are manifestations of distinctiveness through global fidelity because they seek to uncover and communicate how, when global institutional norms are applied to a particular locale, something unique and different emerges that presumably cannot be found in another region.

Demonstrate distinctive wine profiles. Wineries, along with critics and restaurateurs try to define some distinctive features common to particular grape varieties grown in Ontario.

Rieslings, for example, are often characterized as being ‘pure,’ ‘clean,’ and with ‘piercing acidity.’ Red wines are more likely to be characterized as ‘earthy.’ In general, the terms that appear to feature prominently among the wine descriptors are ‘mineral,’ and ‘acidity’ (even in Icewines). The high level of acidity in Ontario wine is often highlighted and underscored as something that makes Ontario wine more food friendly. As one marketing manager summarizes: ‘We want them to be very expressive, very clearly expressing themselves out of a glass. We certainly want to make wines that are [...] best with food which means they have levels of acidity that in some cases make them better with food. And the food makes them better. Because acidity is, you know, has been given to us in copious amounts in Ontario, and we love it.’

To differentiate Ontario wine from its foreign competition, especially from competitors originating in hotter climates and currently popular regions like Australia, California, and Chile, local actors also attempt to emphasize the greater food friendliness resulting from the higher acidity of Ontario wine informed by terroir. As one wine critic explained:

Whereas a lot of the New World wines from Australia, Chile and so on, are very high in alcohol, they’re huge in flavor and they kill anything that you try to eat with them. The wine just dominates everything. And you don’t get a very nice pairing of food and wine. Whereas in Ontario wines, like a lot of French wine and Italian wine, a lot of, you know, Spanish wines and so on, with Ontario wines you’re much more likely to get this nice match in which, you know, you can enjoy the food and the wine and one of them isn’t killing the other.

Summary. Perhaps the most paradoxical element of legitimation efforts among actors in Ontario wine industry is demonstrating distinctiveness through global fidelity. Distinctiveness is derived not from deviating from the global norms but precisely by attempting to outperform other regions with respect to the superior application of the most important institutional practices and superior conformity to cardinal global institutional norms.

DISCUSSION

We argued that institutional studies of globalization can add important insights into the process of legitimation, because legitimation oftentimes takes place within a framework that is simultaneously global and local. To this end, we utilized the notion of glocalization (Ritzer, 2007a; Robertson, 1992) to investigate actors' synthesis of global and local elements, when attempting to legitimize their activities within a global institutional framework. In particular, the notion highlights that putatively local institutional norms to which actors seek to adhere are in part globally derived (Ritzer, 2007a; Zilber, 2006), and that researchers need to look *beyond* proximal and geographically bounded groupings (Wooten and Hoffman, 2008) as originators of institutional norms or as audiences of local actors' legitimation attempts. Thus, our study of how Ontario wineries and other actors seek to legitimize Ontario wine by demonstrating conformity and distinctiveness in relation to global standards represents an extreme case (Siggelkow, 2007) in which such legitimation efforts are especially salient. The specific research question we set out to answer was the following: *How do actors who seek to legitimize their actions within a global institutional framework manage the pressure to conform to global institutional norms while also exploiting the distinctiveness of their locale?*

We found that actors' legitimation work within a global institutional framework might involve four non-mutually exclusive paths. Conformity, the most salient facet of legitimation (Deephouse and Suchman, 2008), might be pursued either through (1) global fidelity (i.e., accurate adoption or copying of global practices) or through (2) local adaptation (i.e., using global institutional norms as a 'cover' for local adaptations and deviations). In our study, because of the illegitimate and stigma inducing local winemaking history, these two legitimation paths were the most prevalent ones, as actors sought not only to demonstrate their compliance with and strict adherence to the global institutional norms but also to repress their past compliance with

now-illegitimate local institutional norms. Both of these paths were essentially aimed at demonstrating belongingness within the global field of fine winemaking and playing by the cardinal and non-negotiable rules of the field (De Clercq and Voronov, 2009; Hargadon and Douglas, 2001), with the second path enabling a degree of decoupling (Meyer and Rowan, 1977; Tilcsik, 2010) between global institutional norms and local material practices.

Distinctiveness, the facet of legitimation that has received less attention (Lounsbury and Glynn, 2001; Navis and Glynn, 2011; Svejenova, et al., 2007), might be pursued either through (1) local adaptation (i.e., demonstrating a close connection between day-to-day practices and the local community) or (2) global fidelity (i.e., deriving unique and distinctive local benefits out of rigid application of global practices). In our study, we found that the lack of legitimate local winemaking history in Ontario hobbled the actors' tendencies to pursue distinctiveness, whereby they pre-emptively attempted to avoid the liability or stigma of being associated with winemaking practices of the past. Accordingly, neither of these two paths involved genuine attempts to modify global winemaking practices. Rather, the first path involved attempts to enhance connections to local audiences to show a genuine Ontario winemaking tradition even if global winemaking practices themselves were not significantly modified. In addition, the second path appeared to indicate a defiant refusal to modify global winemaking practices to fit Ontario, but rather attempts to derive distinctive benefits from the locale through rigid implementation of global winemaking practices. Taken together, the two paths seek to demonstrate distinctiveness within the realm of global norms by leveraging local resources, but what is different between the two is the type of local resources (i.e., cultural resources for the former and natural resources for the latter) that are used to accomplish this objective.

As an inductive study, our aim was to explicate different possible paths to legitimation, rather than to test theory of which paths might be most prevalent or of the possible dynamic aspects of the process. Future research could investigate “patterns” of legitimation strategies by specific actors—for example, whether the aforementioned paths are followed in parallel or in sequence—and whether and how these patterns might differ across actors. Further research is also needed to test the generalizability of the study’s findings. In particular, glocalization involves both homogeneity and divergence, and in our study the homogenizing tendencies of actors to try to make themselves fit the legitimate global template were more pronounced. It is highly likely that the four legitimation paths observed in our study are less relevant in fields where the global institutional norms are not as dominant, and greater discretion is available to local actors. However, it is interesting that even when the pressure to conform is so strong, actors still find opportunities to pursue distinctiveness – sometimes, ironically, through rigid compliance to global institutional norms. Because the interpenetration of the global and the local is so salient in wine industries (Colman, 2008; Robinson, 2006), our setting provided an excellent opportunity to start explicating the link between glocalization and legitimation, and our findings contribute to the literatures on legitimation and globalization in important ways.

Contributions to the Study of Legitimation

Our study echoes recent research that acknowledges that legitimation involves not only conformity but also distinctiveness (De Clercq and Voronov, 2009; Navis and Glynn, 2011; Reinecke, et al., 2012; Rindova, et al., 2011). The latter dimension enables actors to claim that they are adding value and do not merely replicate activities of others. Our findings show some surprising paths, though, in how such conformity and distinctiveness are achieved. In particular, we found that conformity is achieved not only through global fidelity, but also by leveraging

unique local cultural and material resources (e.g., local competitions, unusual grapes), whereby local deviations from global institutional norms are normalized by narratives that obscure the extent to which they deviate from the global institutional norms. Continuity across space and time is then claimed, and even deviations are cast as traditional (c.f., Lounsbury and Crumley, 2007; Zerubavel, 2003).

Conversely, distinctiveness is achieved not only through local adaptation but also through global fidelity. Thus, local actors attempt to cast their field as different from others, in part by rigidly adhering to global institutional norms. This paradox is explained when considering that the very nature of certain global institutional norms in fact contain the seeds for field differentiation. Thus, in this study's context, local wineries use the globally accepted notion of 'terroir', which ties wine to its specific geographic origin, to emphasize these wines' uniqueness. These legitimation attempts to be distinct by following desirable global institutional norms, that are seen as so entrenched in actors' conscience, so as to become unquestionable (Bourdieu, 2000) also features in research on how government and public service organizations attempt to show 'efficiency', 'entrepreneurship' and 'responsiveness'. Given the increased tendencies to model public sector on private sector in a number of countries (e.g., Du Gay, 2008; Oakes, et al., 1998), government actors, for instance, might derive legitimacy precisely by demonstrating distinctiveness from their immediate peers through fidelity with respect to these preferred external institutional norms. Other examples of pursuit of distinctiveness through global fidelity might include compliance with field-specific institutional norms about civil rights, equality and social justice (Edelman, 1992; Tsutsui and Shin, 2008) and small government (Campbell, 2004), corporate social responsibility (Helms, et al., 2012), or art-for-art's sake (Bourdieu, 1983).

Our study also points to the challenge of actors' legitimation efforts when certain elements of their field's history stand in the way of credible adherence to external established standards. Because of the acclaimed inferiority of Ontario wine industry's past practices and products, the industry has to demonstrate not only adherence to the legitimate global institutional norms, but also 'disadherence' to the now illegitimate local institutional norms of the past and continue to furnish evidence of the deinstitutionalization of those now-illegitimate practices. In other words, actors seek to demonstrate both what they are doing and what they are *not* doing, in effect constructing a narrative of heroes and villains (Ruebottom, 2013), whereby the global norms are praised and reinforced and local now-deinstitutionalized practices are derided.

Thus, our study underscores how actors attempt to claim their activities as legitimate by steering audiences to remember some things while *forgetting* others. In our case, the wineries sought to legitimize their activities by connecting to legitimate global history, while also erasing the illegitimate local one. Wineries in fact attempted to make their audiences forget a complete era in the field's history in order to define what the field is and is not about (Anteby and Molnár, 2012; Rivera, 2008). Thus, to align with well-established global institutional norms, actors purposefully suppress and erase past events that undermine their legitimating efforts. Nonetheless, even as wineries vigorously sought to repress the stigmatized past of the industry, we also observed that they connected to 'favorable' aspects of their locale's history, whenever possible, including to folklore and memorable occurrences.

The aforementioned selective and strategic construction of past narratives (i.e., highlighting those that are advantageous and obscuring those that are not) underscores the utility of the notion of rhetorical history, or 'the strategic use of the past as a persuasive strategy' (Suddaby, et al., 2010, p. 157), as a legitimation tool. Prior research has examined it in the

context of organizational identity management (Anteby and Molnár, 2012) and as a strategic resources for individual firms (Foster, et al., 2011; Suddaby, et al., 2010). Our findings suggest that rhetorical history can be performed not only by individual firms but by collectives and industries that seek to legitimize their activities. Future research would benefit from a more explicit investigation of the role rhetorical history may play in the context of globalization. For example, firms often struggle to position themselves effectively in industries and markets that are embedded in a variety of conflicting cultural historical constructions (e.g., domestic and global; see Amis and Silk, 2010): How do they assemble these into coherent toolkits of historical narratives that enable effective use of rhetorical history? How do they do such rhetorical history work?

Contributions to the Study of Globalization

Legitimation is a key aspect of globalization, such that local actors' legitimacy is assessed against standards that are derived both locally and globally. In this regard, the notion of glocalization emphasizes that institutional norms in essence are local and global (Khaire and Wadhvani, 2010), and local efforts cannot be seen in isolation of the broader global institutional framework in which they take place (Ritzer, 2003). Our study draws from this notion to highlight the agency in local actors' legitimatization efforts through their selective adoption and modification of global institutional norms. Thus, the goals of conformity and distinctiveness are sought after by both the purposeful reliance on global norms and the selective adaptation of these norms to unique local conditions.

Nonetheless, the findings also indicate that local adaptation is often cast in *relation* to the global norms, thus treating them as the referent and source of relevant knowledge. Sampson (1993) argues that practices, behaviors, and so on are inevitably described not in absolute terms

but instead in relation to an ‘absent standard.’ That is not to say that there are no standards, but rather that ‘historical relations of power between groups have rendered the standard absent, an unmarked but controlling feature of our understanding of ourselves and others’ (Sampson, 1993, p. 1224). Our findings suggest that such absent standards may oftentimes be global and may not always be self-serving (c.f., Sampson). Instead they might be invigorated by local actors’ referencing and glorifying of global institutional norms, such that those norms construct them as receivers rather than creators of relevant knowledge (Bourdieu, 2000).

A related mechanism that might be implicated in this process is that of stigma consciousness (Pinel, 1999), whereby stigmatized actors are aware of the negative stereotypes held about their group (here, local field) by the ‘out-group’ (here, global field of fine winemaking), and this awareness in turn influences their interactions with the out-group (e.g., Hudson and Okhuysen, 2009). Despite their efforts to de-emphasize historical local wine practices, Ontario wine producers (and their audiences) appear to exhibit high degrees of stigma consciousness, as evidenced by their preoccupation with the negative perceptions of Ontario wine ‘of old’ due to its incongruence with the global institutional norms that have become an absent standard against which legitimacy judgements are made. This consciousness oftentimes motivates them to comply with these norms and to distance Ontario winemaking from the ‘bad’ local history. Whereas stereotype consciousness has been applied primarily in the context of race (Slay and Smith, 2011) and gender (Pinel, 2002) inter-group relations, future research could use it to explain the achievement of legitimacy, and particularly the challenge hereto, by local fields that are perceived inferior in relation to established global norms (Frenkel and Shenhav, 2003). A related question that is valuable to explore in future research is how stereotype consciousness

levels might vary *among* individual local actors, and to what extent such variance is situationally conditioned or influenced by historical factors, such as colonial relations (Said, 1993).

Our findings are also valuable for research in international management. Such research acknowledges the tension between global fidelity (or isomorphism) and local adaptation, as studied herein, in terms of how actors within multinational corporations can balance corporate and local demands (Ahmadjian and Robinson, 2001; Robinson, 2003). Thus, previous institutional approaches to international management acknowledge that these actors confront institutional pressures both from within the corporation and the specific foreign locales (Kostova and Roth, 2002), which complicates legitimation (Kostova, et al., 2008).

Implicit in our findings is a possible added layer of complexity, whereby the pursuit of global synergies versus local adaptation may not be straightforward, especially with respect to achieving distinctiveness. As our findings suggest, the receptiveness of a locale to particular global practices might be colored by past historical occurrences, such that local audiences may not necessarily prefer global practices to be modified extensively but might prefer them to be adopted with great fidelity. Thus, in contrast to the typical expectation of liability of foreignness (Zaheer, 1995), local audiences might even prefer global practices over the local ones. This might be especially the case in countries with histories of colonial relations (Frenkel and Shenhav, 2003; Khan, et al., 2007) which may alter the referents (Said, 1993) used in legitimacy judgments. Future research in international management, then, should examine the extent to which distinctiveness by local subsidiaries might be accomplished not only through adaptation to local norms, but also through selective fidelity to global norms.

NOTES

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1. A desert style sweet wine, the grapes for which typically are harvested at temperatures ranging from -10°C to -13°C . As such, the wine is difficult to make and is very expensive ($>\$35/375$ ml). Ontario is the world's biggest producer of Icewine.

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Figure 1: The growth of VQA wineries in Ontario (Vintners Quality Alliance of Ontario, 2012)

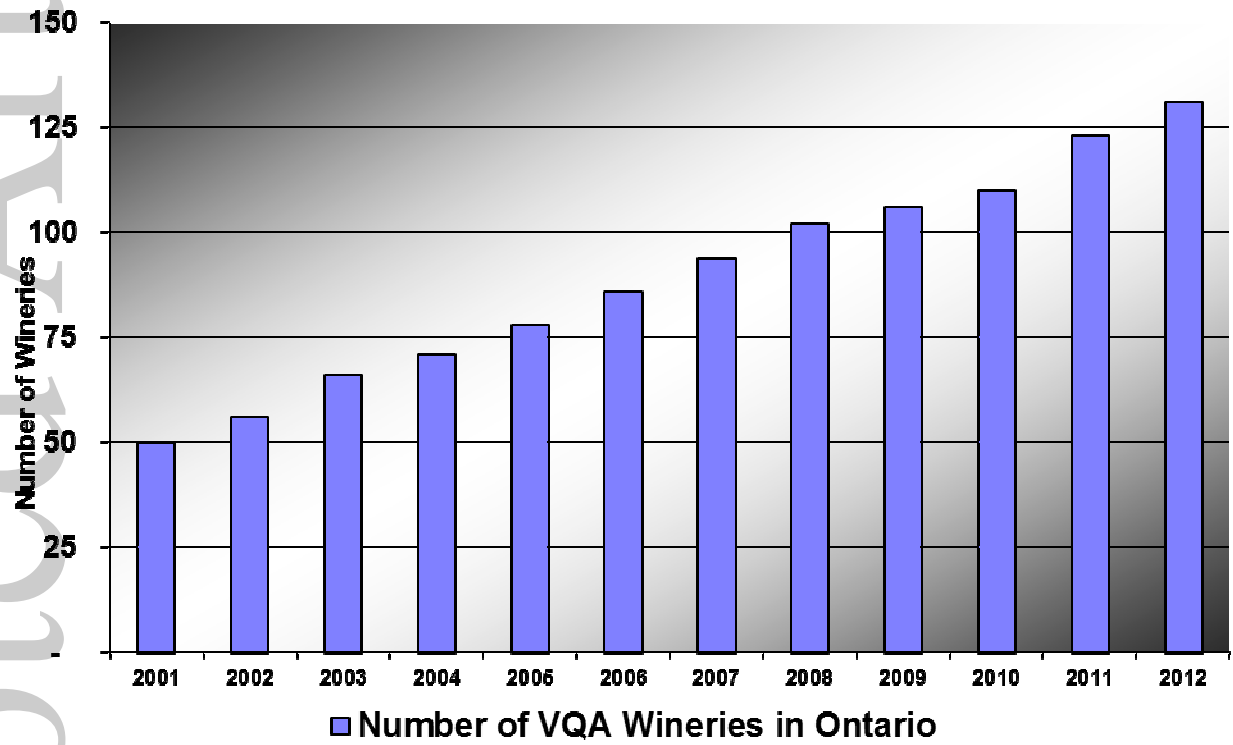


Figure 2: Data Structure

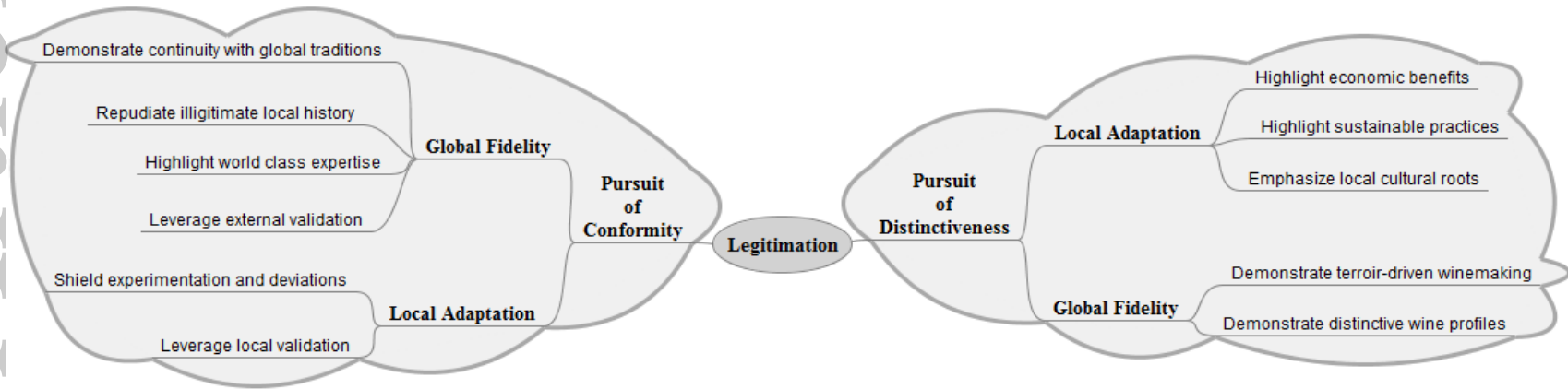


TABLE I: Comparison of Main Participating Wineries

Winery Name (Pseudonym)	Interviews	People Interviewed (number of interviews)	Other Data Sources	Type of Winery	Years in Business	Product Price Range	Distribution Channels	Quality Reputation	Commercial Success
Niagara Estate	15	Proprietor/Viticulturalist (7) Winemaker (2) Marketing Manager (2) Sales agent (2) Assistant winemaker (1) Operations manager (1)	20 hours of observations; Website; 36 newsletters; 9 press items	Small family-owned	10-15 years	\$15-\$40	Mainly winery boutique	High	Moderate
Countryside Winery	10	President (3) Marketing manager (3) Viticulturalist (1) Winemaker (1) Sales agent (2)	15 hours of observations; Website; blog; 33 newsletters; 25 press items	Medium family-owned	15-20 years	\$10-\$50	LCBO and winery boutique	Moderate to high	High
Thomas Winery	3	Proprietor (1) Winemaker (1) Marketing manager (1)	15 hours of observations; Website; 22 newsletters	Small family-owned	5-10 years	\$15-\$100	Mainly winery boutique	Mixed	Low to moderate
Falls Vineyard	6	VP Marketing (4) Head winemaker (2)	15 hours of observations; Website; 76 newsletters; 15 press items	Large corporate	20-25 years	\$10-\$80 (depends on brand)	LCBO and winery boutique	Low to high (depends on brand)	High
One-with-Nature Winery	2	Proprietor	5 hours of observations; website; 56 newsletters; 13 press items; transcript of media interview	Small family-owned	>5 years	\$15-\$35	LCBO and winery boutique	High	High
Heritage Estates	1	Proprietor	5 hours of observations; website; 2 newsletters; 2 press items	Small family-owned	>5 years	\$20-\$35	Mainly winery boutique	Low to moderate	Low

Breakthrough Winery	2	Winemaker Retail manager	15 hours of observations; website; 52 newsletters; 14 press items; 2 transcripts media interviews	Medium family-owned multi-brand	>10 years	\$15-40 (depends on brand)	LCBO and winery boutique	High	High
Old Vines Estates	1	Winemaker	10 hours of observations; website; 13 newsletters; 9 press items	Medium family-owned	>25 years	\$15-\$100	LCBO and winery boutique	Moderate to high	Moderate
Terroir Vineyards	2	Winemaker Retail manager	20 hours of observations; website; 63 newsletters; 7 press items	Small family-owned	>10 years	\$15-\$40	Mainly winery boutique	High	Moderate
Pinnacle Vineyards	1	Winemaker	Website; 11 newsletters; 56 press items; 1 media interview transcript	Small corporate subsidiary	>5 years	\$30-\$75	Mainly LCBO	High	High
Future Vineyards	2	Director of Marketing	20 hours of observations; website; 68 newsletters; 11 press items	Small family-owned	>10 years	\$15-\$45	Winery Boutique and LCBO	High	Moderate
Cool Vineyards	1	President	Website; 12 press items	Medium family-owned	>5 years	\$15-\$35	Mainly LCBO	Moderate	High
Rural Vineyards	1	Proprietor	3 press items	Small family-owned	<5 years	\$15-\$35	Mainly winery boutique	Not yet known	Not yet known
Distinction Estate	4	President Winemaker Director of Marketing Director of Hospitality	15 hours of observations; website; 13 newsletters; 14 press items	Medium family-owned	20-25 years	\$15-\$45	LCBO and winery boutique	Moderate to high	High

John Smith Winery	1	Proprietor	Website; 5 press items; 2 transcripts of media interviews	Small family-owned	>5 years	\$25-\$50	Mainly winery boutique	High	Moderate
Orchard Estates	1	Proprietor	10 hours of observations; website; 44 newsletters; 8 press items; 2 transcripts of media interviews	Small family-owned	<10 years	\$15-\$45	Mainly winery boutique	High	Moderate
Scenic Vineyard	1	Proprietor	Website	Small family-owned	<5 years	\$15-\$35	Mainly winery boutique	Moderate	Moderate

TABLE II: Data Supporting Interpretations of Conformity through Fidelity

Theme	Illustrative Quotes	Other Evidence
Demonstrate continuity with global traditions	<p>‘Sparkling wine made in the traditional manner is truly a labour of love and winemaker Joseph sheds light on what it takes to turn grapes into ambrosia of the gods.’ (Countryside Winery Newsletter, Fall/Winter 2006)</p> <p>‘The similarities between the climates of Burgundy and the north Niagara Peninsula encouraged him [founder] to focus on grape varieties typically to northeastern France.’ (Website, Future Vineyards)</p> <p>‘This blend of 50% Pinot Noir from the Edgerock Vineyard and 50% Gamay from the Sandstone Vineyard has developed into a delightful burgundian style red that has a complex, earthy, fruit character with a long finish.’ (Terroir Vineyards Newsletter, Fall 2006)</p>	<p>From observations: Use traditional glasses during tasting (almost all wineries).</p> <p>From observations: Countryside Winery, One-with-Nature Winery (and several others) organize all day events that allow consumers to ‘get their hands dirty’ by working in the field, experiencing first-hand the laborious traditional method grape growing techniques used by these wineries.</p> <p>‘Jack continues to work his magic having his hand in blending a little of the “old world” with the “new” producing wines wonderfully Burgundian in style, with finesse and length.’ (wine blog about Pinnacle Vineyard, April 2010)</p>
Repudiate illegitimate local history	<p>‘And you can pretty much directly trace the roots of the, sort of quality wine industry in Canada to 1988 with the free-trade agreement. So we’re very young. Most people, if they know anything about Canadian wine know that it’s very, very young.’ (Interview with Marketing Manager, Niagara Estate, April 2007)</p> <p>‘We were able to move away from concord grapes, you know, and labrusca and move only into vinifera and hybrids.’ (Interview with proprietor of Scenic Estates, February 2011)</p> <p>‘The general thought for the region was that we couldn’t grow what we call “vinifera” grapes here, so the higher quality, the chardonnay, pinot noir, et cetera. So they had planted hybrids and labrusca in most of the regions because they were worried about it dying in the winters. And in reality they hadn’t chosen the right sites [...] the warmer pieces of land to plant on for vinifera and that’s why it wasn’t working here. But the hybrids and the labrusca have-- they’re not ideal for winemaking, you know, they have an off-- a foxy taste or they just don’t have the character and they’re not as recognizable as a wine.’ (Interview, Head Winemaker, Falls Vineyard, March 2007)</p>	<p>‘And there wasn’t much of a quality reputation with Ontario wines at that point, you know, still the Baby Duck kind of image, you know, or Marie Christine or Hochtaler brands like that were the big drivers. So I’ve seen it evolve. We had the Free Trade Agreement that was signed and there was a lot of concern expressed about the future of the industry at that point that they wouldn’t be able to survive and compete. Which, in retrospect, they obviously were.’ (Interview with LCBO executive, May 2008)</p> <p>‘This [Free Trade] was at the end of the zoological period of Canadian wine. You remember -- the baby bears, the baby deers and that staple of college dorms, baby duck. Sweet and insipid, the Canadian products were going to have a hard time dealing with a burgeoning California industry that had recently won blind taste tastings over formidable French counterparts.’ (from a newspaper Editorial, September 2008)</p> <p>‘the change in the Wine Content Act which outlawed labrusca varieties and said you can’t use concord and Niagara and terrible grapes like that in the making of wine which probably is the best thing that could have happened.’ (Interview with critic, September 2007)</p>
Highlight world class	‘previously in his home country of France,	‘While working for the Domaine Thomas-

<p>expertise</p>	<p>[the winemaker] worked at the notable Chablis house, Domaine Laroche, where he oversaw production for a period of 10 years. During his tenure at Domaine Laroche, Colas produced Wine Spectator Magazine's 1998 White Wine of the Year.' (website of Terroir Vineyards)</p> <p>'While still a student, he was able to rack up three harvests in Hawkes Bay [New Zealand]. [...] He graduated (top of class) and promptly moved south again to work at the world renowned Pinot Noir Producer, Felton Road, in Central Otago.' (website of One-with-Nature Winery)</p> <p>'Doug's talent in crafting premium wines has been honed over 23 vintages in a number of countries, including the U.S.A, Australia, New Zealand and Canada.' (Website of Falls Vineyards)</p>	<p>Moillard in Nuits-Saint-Georges, Burgundy, Greg was able to expand his education and experience even further.' (News article about Pinnacle Vineyard, June 2010)</p> <p>'Kevin was then invited to join the historic Château Génot-Bou langer in Meursault, Burgundy, as the winemaker.' (article about Pinnacle Vineyard, October 2009)</p> <p>'[Winemaker], who has worked in Australia, France and Germany and has an intuitive sense of when to step in and when to let the wine follow its own course of evolution.' (News article, August 2008)</p>
<p>Leveraging external validation</p>	<p>'The result is a Gamay of exotic flavour, silky fullness and generous length, with serious ageing potential. The previous vintage, 2008, vanished rapidly thanks in part to a 90-point rating from wine critic James Suckling (formerly of Wine Spectator).' (Future Vineyards newsletter, April 2011, italics in original)</p> <p>'[we are] excited to announce that our 2007 Chardonnay Icewine has won one of the wine world's top honours in this year's Citadelles du Vin competition!' Falls Vineyards newsletter, July 2011</p> <p>'We would like to share with you, our valued customers some very exciting news! Hank is in London as we speak to accept the hardware for the 6 wines we entered in the prestigious Decanter World Wine Awards. Exceptional Vineyards literally struck gold in the competition dubbed by wine writer Tom Stevenson as "THE ultimate terroir competition".' Exceptional Vineyards newsletter, May 2010</p>	<p>'17.5 [out of 20] Drink 2011-2015 Quite deep. Quite rich on the nose with real vibrancy on red clay. [...] Dry and austere on the end with real character. Really very burgundian. Real density and this tastes as though it should really develop complexity.' (Jancis Robinson's review of John Smith Winery's Chardonnay, May 2010)</p> <p>'The Chardonnays emerging from John Smith's small vineyard [...] laser-etched with acidity, minerality and the sort of originality that we all once thought only Burgundy could deliver. [...] This is a truly great Chardonnay of compelling character.' (Matt Kramer, Wine Spectator writer, choosing Smith's Chardonnay one of his three wines of the year, December 2011)</p>

TABLE III: Winners of ‘Winemaker of the Year Award’ at Ontario Wine Awards (1995-2012)

Year	Winner	International Credentials
1995	Herbert Konzelmann	Managed the family’s winery (founded in 1893) in Germany until relocating the winery to Canada in 1984
1996	Karl Kaiser	Born and raised in Austria with some winemaking experience; international awards; considered pioneer in producing Icewine, the most internationally acclaimed Canadian wine category; a pioneer in planting <i>Vinifera</i> grapes in Ontario; co-founder of one of the most internationally acclaimed Canadian wineries
1997	Jim Warren	Domestic credentials
1998	Ron Giesbrecht	Domestic credentials
1999	Angelo Pavan	Domestic credentials; international acclaim for some wines produced
2000	J-L Groux	Born and raised in Loire Valley, France; educated in College de Beaune in Burgundy and at the University of Bordeaux
2001	John Marynissen	Originally Dutch; domestic credentials; one of the first to plant <i>Vinifera</i> grapes in Ontario
2002	Sue-Ann Staff	Educated in Australia; several vintages abroad before working in Canada
2003	Eddy Gurinskas	Domestic credentials
2004	Ann Sperling	Domestic credentials but international recognition
2005	Carlo Negri	Raised and educated in Italy; worked in an Italian winery before coming to Canada
2006	Jean-Pierre Colas	Head winemaker at Domaine Laroche in Chablis; winner of Wine Spectator Magazine's 1998 White Wine of the Year
2007	Paul M. Bosc	Five generations of grape growing and winemaking in France and Algeria
2008	Craig McDonald & Rob Power (co-winemakers)	CM raised in and worked in Australia before coming to Canada; RP domestic credentials
2009	Thomas Bachelder	Work experience in Burgundy and Oregon before returning to Canada
2010	Darryl Brooker	Originally Australian; education and work experience in Australia and New Zealand
2011	Paul Pender	Domestic credentials; international acclaim for some of the wines produced
2012	Andrzej Lipinski	Domestic training; international acclaim (Vitality 1999 Gold Winner)

TABLE IV: Data Supporting Interpretations of Distinctiveness through Local Adaptation

Theme	Representative Quotations	Other Evidence
Highlight economic benefits	<p>‘Consumers taking the challenge will not only experience exceptional wines, but with every Ontario VQA wine purchase they will create \$11.50 per litre in return to the economy over and above taxes versus 67 cents per litre in value for imported wines and the choice becomes even more appealing. Drink local wines because they are great and have great benefits to the province.’ (Press Release, Wine Council of Ontario, August 2009)</p> <p>‘Wine buyers can help reduce hunger this holiday season by purchasing Ontario VQA wines at LCBO stores throughout the province. The Ontario wine industry is launching a campaign during the holiday season to raise funds to benefit those facing hunger in our communities.’ (Press Release, Wine Council of Ontario, November 2007)</p> <p>‘Scenic Hills supports the region by building mutually beneficial partnerships, collaborative projects and actively participating in the regional initiatives that both support and benefit our communities. Viewpointe is situated in one of the finest regions in Ontario and is proud to play an active role in its continued success.’ (Scenic Hills Winery’s website)</p>	<p>‘The VQA wine industry contributes significantly to the economy of Ontario and has created over 1,300 additional jobs in the last four years.’ (The Friends of the Greenbelt Foundation [environmental working group), Press Release, June 2012)</p> <p>Website set up by Wine Council of Ontario in 2009 (www.thinkglobaldrinklocal.ca) to encourage consumers to drink local; heavy emphasis on economic benefits to Ontario.</p> <p>‘Despite hard economic times in Ontario, there is one sector that is booming...the wine industry. A new study says the industry pumped \$529 million into the provincial economy last year.’ (News Article, September 2008)</p> <p>‘Ontario’s grape and wine industry is a key economic driver in Ontario, with over \$610 million in wine sales annually, particularly in the province’s designated viticulture areas: Niagara Peninsula, Prince Edward County, Lake Erie North Shore, Pelee Island and Ontario’s emerging South Coast wine region.’ (Blog dedicated to Ontario wine industry, April 2012)</p>
Highlight sustainability	<p>‘We also look forward to seeing you on June 18th for our Taste the Place event, where you can walk our biodynamic vineyard with [the proprietors] as you taste our newly released wines!’ (Newsletter, Orchard Estates, June 2011)</p> <p>‘We returned home impressed by many of the methods we saw in practice there such as high-density planting, pruning and biodynamic farming, and we resolved to try some of them here.’ (Newsletter, Future Vineyards, April 2007)</p> <p>‘Our basic viticultural practices include integrated pest management (advocated by the World Wildlife Fund. More significantly our vineyards have been farmed since 2004 in accordance with the world leading standards established by Sustainable Winemaking Ontario.’ (Website,</p>	<p>‘25 or so wineries who have signed up for the Wine Council of Ontario’s “sustainable Winemaking Ontario” program, a proactive environmental initiative to help wineries identify and adopt Best Practice environmental stewardship. Kudos to the industry for undertaking such an initiative.’ (Critic’s report on the state of the industry, August 2009)</p> <p>‘The “black sheep” [in the title of the wine] is a reference to the winery’s striving for agricultural sustainability, which includes letting a flock of sheep roam in the vineyards to look after fertilization and natural pruning as they eat grape leaves.’ (Critic’s review, September 2011)</p> <p>From observations: LEED certified buildings (two wineries); Biodynamic practices showcased at five wineries during</p>

	Countryside Winery)	tours; most wineries emphasize sustainable practices (e.g., reusing rain water, hand sorting, alternative power generation, energy conservation, etc.); many wineries participating in slow food/sustainable food events and partner with sustainability focused restaurants.
Emphasize local cultural roots	<p>‘Fire and loss could be the harsh result and yet become the public spectacle of tobacco curing process in traditional kilns. Today, we have carefully adapted our kilns and drying processes for our hand-selected grapes to produce wines that are divinely aromatic and rich in flavours.’ (from website of Burning Kiln Winery)</p> <p>‘You might also be interested in our hospitality centre located in the 200-year-old Loyalist Georgian Wm. Woodruff House. It is one of Canada’s top fifty most architecturally significant ancestral homes. We all invite you to come and experience it for yourself.’ (from website of Ravine Vineyards)</p> <p>‘Few families in Ontario can boast the fact that an existing tavern built 150 years ago is still in the family. One such tavern is the Henry Smith Tavern or Mountainview Inn located where three Townships, Louth, Pelham and Thorold, come together. Henry Smith owned and operated the tavern/inn from on or about the year 1842 to February 10, 1856 when he died.’ (website of Countryside Winery)</p>	<p>‘Critical to the feel of the property is the winery’s historic tasting room. Woodruff House was once a forgotten landmark in St. Davids that was originally built in 1802 but torched by American invaders during the War of 1812. It was rebuilt in 1827 and went through various transformations until it was dismantled and moved to Caledon. The house, including bricks and hearth, was resold and moved a few more times before Ravine owners, Blair and Norma Harber, bought it and moved it to the property and reconstructed the gorgeous building very close to the original site.’ (from a wine critic’s column, September 2009)</p> <p>From observations: during tours wineries often note long family history in the region/multiple generations of framers in the region.</p>

TABLE V: Data Supporting Interpretations of Demonstrate Conformity through Local Adaptation

Theme	Illustrative Quotes	Other Evidence
Shield experimentation and deviations	<p>‘We’ve had many days where gamay has been our top selling wine. But that’s a new thing because in the past people would turn their noses up at it. And it was seen as kind of a humdrum wine. For many people their only experience with gamay is with those poorly made wines that come out every November, right [i.e., Beaujolais]. And we would say, oh, but you can make a real red out of gamay.’ (Interview with Director of Marketing, Future Vineyards, December 2010)</p> <p>‘To realize the region’s full viticultural promise, they focused on planting time-honored European grape varietals, and cultivating these vines with a mixture of traditional and modern techniques. [They] were among the first to plant Riesling and Chardonnay vines on the Niagara Peninsula, helping to pioneer this emerging North American wine region.’ (Website of Old Vines Estates)</p> <p>‘The tradition of adding Viognier to batches of our best Shiraz began with a happy accident in 2004, when our poor old basket press quit in the midst of pressing hand-picked Viognier. The grapes were rescued from the press and added to fermenting Shiraz bins - a practice not uncommon in the northern Rhône Valley. While the press may have broken, the resulting wine was superb, exhibiting powerful aromatics and astounding depth.’ (Breakthrough Winery’s newsletter, November 2007)</p> <p>‘We are constantly searching and developing new ways of improving our art form. However, we have not lost sight of some of the more traditional aspects and techniques of winemaking.’ (Website of Countryside Winery)</p>	<p>‘Really seductive, northern Italian-like aromas, like top notch barbera/nebbiolo: seductive wood, sour and black cherries and sweet wood spice. The palate is big and burly (for gamay), with firm dusty tannins, loads of concentration, long finish. A very serious example to enjoy for 5-7 years, though I’ll be tempted earlier.’ (Review by a critic of Future Vineyard’s Gamay, Spring, 2009)</p> <p>‘In this instance, the Canadian oak frames the wine’s fruit nicely, adding refinement to the flavour as opposed to masking them with overt spice or toast notes.’ (Review of Niagara Estate’s Canadian Oak Pinot Noir, April, 2009)</p>
Leverage local validation	<p>“2008 is proving to be a fine vintage in Ontario for the Burgundian grapes, as this fine example of chardonnay from One-with-Nature clearly shows - a great follow-up to the excellent 2007. It's clean, classy, and well-balanced.” (Canadian critic’s review quoted in One-with-Nature’s Winery’s newsletter, August, 2010)</p>	<p>From observations: One of the two Ontario wine competitions, The Cuvee, gives awards in many grape varietal categories (e.g., Best Chardonnay, Best Riesling). Some wines are designated as ‘Cuvee gold’ to indicate that the recipient of this designation should be expected to fair especially well in comparison to global</p>

	<p>'In his latest ratings, famed wine critic / educator David Lawrason assigned four above-90 marks to Future Vineyards.' (Future Vineyards newsletter, January 2011)</p> <p>'Glamour Winery had been awarded the prestigious "Winery of the Year" award at the 2010 Canadian Wine Awards.' Glamour Winery's newsletter, December 2010</p>	<p>competitors. As a 2008 newspaper article explains, 'When it comes to Cuvee Gold honours, judges recommend only the wines they feel would be awarded a gold medal in international competitions.'</p> <p>'The floral element on the nose (suggestive of dried roses and violets) is characteristic of the vineyard. On the palate, there are layers of earthy mineral and savoury flavours and vibrant red fruit notes. This is a beautiful expression of Pinot Noir.' (Canadian critic's review of a Pinnacle Vineyard Pinot Noir, April 2009)</p> <p>'It possesses a nose of currants, cherry, sweet peppers, leafy tobacco, leather, lavish spice and an interesting mint/eucalypt note. It shows purity of fruit on the palate with spice notes of mocha and vanilla in a well-balanced presentation.' (Canadian critics' review of Niagara Estate's Cabernet Franc, May 2012)</p>
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TABLE VI: Data Supporting Interpretations of Demonstrating Distinctiveness through Global Fidelity

Theme	Representative Quotations	Other Evidence
Demonstrate terroir-driven winemaking	<p>‘When you talk about authentic wines, Riesling is it. There’s no barrel fermentation. There’s no nothing else. [...] And I don’t have the map here, but, you know, in that picture, we hoped people would make the connection between the variety [Riesling] and that piece of dirt that it comes from. That’s it; terroir.’ (Interview with Mike, winemaker at Old Vines Estate, March 2011)</p> <p>‘Our strategy is, and it always has been but we’re defining it more, to make our wines fantastic representations of the grapes grown in this dirt, with this soil, in this climate, make them-- continue to evolve them as unique and ultra-high quality.’ (Interview, President, Countryside Winery, March 2007)</p> <p>‘It’s a rough and tumble environment out there. An unrepeatable combination of Mother Nature, skilled human intervention, and a little luck go into every vintage here in Ontario, and it’s that indefinable quality that makes these bottlings some of most terroir-reflective and dynamic wines being produced today.’ (Website, Breakthrough Winery)</p>	<p>From observations: While touring the vineyards during an open house, conduct tasting of wines in the specific vineyards from which grapes are sourced; explain how particular geographical features contributed to the taste of the wine. (common practice at many wineries)</p> <p>‘Using traditional Burgundian methods, wines are crafted to exemplify the distinct Niagara terroir.’ (June 2010 Newspaper article in reference to Pinnacle Vineyards)</p> <p>‘It was quite clear their philosophy and wine-making decisions are driven by dirt—they’re committed terroir-ists.’ (Critic’s column, September 2008)</p>
Demonstrate distinctive wine profiles	<p>‘I said, “No, I’m going to focus on stuff we can do well.” If you come in and you want a big shiraz from like Australia, sorry, I don’t have one. I don’t offer it. They don’t buy it. They don’t buy anything and I’m okay with them not buying anything ‘cause I don’t want them to drink something they don’t like, right. So they don’t buy it. But what happens is the people who do like pinot noir come and go, “Oh, this is a good pinot noir. Yeah, I’ll buy it.”’ (Interview, Proprietor One-with-Nature Winery, August 2008)</p> <p>‘We currently have three distinctive Niagara Pinots to sample... the fruity 2008 Escarpment, the earthy 2008 Mottiar and the solidly structured 2007 Estate. For an enlightening tasting, ask to try them side-by-side.’ (Future Vineyard Newsletter, August 2010)</p>	<p>‘It’s a brilliant wine that tastes like Riesling all the way, yet doesn’t come across like a German or Alsatian copycat. Call it a new, fresh, Niagara style.’ (Wine review, November 2007)</p> <p>‘Overall, I’ve been more impressed with the burgundian side of the Niagara valley, both in red and white. Dry chardonnays with structure and a very distinctive flinty, mineral character, from the Niagara Escarpment’s limestone soils, are among my favorites.’ (Critic’s column, October 2010)</p> <p>‘Niagara excels at musqué, a clone with a floral muscat-like aroma that’s unusual for chardonnay. Expect licorice and melon aromas, rich texture and good length. Chill well; pair with salads.’ (Critic’s review of Distinction Estate Chardonnay, August 2009)</p>

	<p>“This wine’s distinctive fruit cocktail and fleshy peach aromas can be traced to the carefully cultivated Riesling vines on Gunther Funk’s property. That fruit was blended with Riesling grapes sourced from vineyards in Niagara on the Lake and Beamsville to create an exciting wine with vibrant fruit character.” (Critic’s review, quoted in Terroir Vineyard’s newsletter, Fall 2006)</p>	
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