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The Role of Wine Certifications in the Growth of European Organic Wine Exports: Insights from Austrian Producers

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Abstract

This thesis examines how wine certifications shape the export strategies of Austrian eco-certified wineries, with a focus on biodynamic producers. While prior research mainly analyses certification from the demand side, producer-side evidence on how certifications operate in export markets remains limited. Based on semi-structured interviews with Austrian wineries and a sector association, the study applies a qualitative multiple-case design and Gioia-style analysis. The findings show that certification functions as a license to operate in some markets and as a context-dependent signal in others. However, certification alone does not secure price premiums or repeat orders. Value capture depends on integrating certification into firm-specific resources, narratives, and importer relationships.

Diese Masterarbeit untersucht, wie Weinzertifizierungen die Exportstrategien österreichischer biodynamisch zertifizierter Weingüter beeinflussen. Während bestehende Forschung Zertifizierungen vor allem aus Nachfragesicht betrachtet, liegen nur wenige Erkenntnisse zur Produzentenseite vor. Auf Basis leitfadengestützter Interviews mit österreichischen Weingütern und einer Branchenorganisation wird ein qualitatives Multiple-Case Design mit Gioia-orientierter Analyse angewandt. Die Ergebnisse zeigen, dass Zertifizierungen je nach Markt als Marktzugangsvoraussetzung oder als kontextabhängiges Signal wirken. Dauerhafte Wertschöpfung entsteht jedoch erst durch die Einbettung der Zertifizierung in unternehmensspezifische Ressourcen, Narrativen und Importpartnerschaften.

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1. Introduction

Export markets reward wines that travel well in both bottle and story. For European producers who farm organically or biodynamically, the bottle carries more than just wine. It carries a claim about practice, place, and values that buyers cannot observe directly, and certification turns that claim into something legible. An eco-logo helps distant partners decide whether a wine deserves attention, and in some markets, it is a condition of entry. Yet many producers report that a seal opens the first door without deciding what happens next. Price, placement, and repeat orders tend to rest on a broader package that includes reputation, terroir, style, and the quality of the importer relationship. This thesis examines how these pieces connect in practice for Austrian wineries that export organic and biodynamic wines.

The European regulatory landscape is now stable enough to support a clearer conversation. Regulation (EU) 2018/848 regulates organic production and logo use across Member States, and it has applied to viticulture and winemaking in full (European Parliament & Council, 2018; Agrinfo, 2025). Private-law schemes add further texture: Demeter and respekt – BIODYN ensure biodynamic farming with third-party audits (Austrian Wine Marketing Board, 2025a). For the natural-wine niche, France's Vin Méthode Nature charter defines a minimum process framework that is recognized domestically (Vin Méthode Nature, 2022). Import markets shape the picture as well: In the United States the Strengthening Organic Enforcement rule took full effect in March 2024 and now requires electronic NOP Import Certificates while extending certification obligations deeper into the chain (USDA Agricultural Marketing Service, 2023). In Scandinavia, state monopolies specify sustainability and traceability expectations in tender procedures, which can turn a voluntary seal into an eligibility criterion for a listing (Systembolaget, 2024).

Austria is a compelling setting for studying how certification interacts with export growth. The country has an unusually high share of certified organic vineyards for its size, and a visible cohort of biodynamic producers, which together create a dense field of practice and communication around eco-labels (Austrian Wine Marketing Board, 2025a; OIV, 2022). Many Austrian wineries operate on a modest scale, with an average vineyard size of 4.42 hectares in 2024, but Austria's wine export volumes remain substantial. Exports regularly reach non-neighboring markets, including the United States and Scandinavia (Austrian Wine Marketing Board, 2025b). These destination patterns expose wineries to different institutional designs and different ways in which a label is read.

Existing research offers partial answers. On the demand side, reviews and primary studies show that consumers respond positively to sustainability cues in wine, although the size of the premium varies by country, segment, and framing (Schäufele & Hamm, 2017; Galati et al., 2019; Moscovici et al., 2021; Vecchio et al., 2023). At the trade level, institutional work on the Scandinavian monopolies and exporter guidance on the US three-tier system explain why route-to-market choices differ across regions (Systembolaget, 2024; Wine Australia, n.d.). Classic theory suggests why signals matter when quality is hard to observe, why legitimacy is required for acceptance, and why capabilities inside the firm determine who turns potential into advantage (Spence, 1973; Barney, 1991; Teece, 2007). What is thinner is producer-side evidence that connects certification to export strategy at the level of lived practice. We know less about how Austrian eco-certified wineries experience rules and buyers, how they present themselves across markets, how they choose partners, and how these choices show up in brand positioning and prices.

This thesis addresses that gap with four research questions:

RQ1. How do wine certifications (organic, biodynamic, natural) impact Austrian eco-certified producers' export success in international markets?

RQ2. What challenges do producers face in complying with different export regulations, and how do these challenges influence market access?

RQ3. How do wine certifications shape brand identity, pricing, and positioning in international markets?

RQ4. What export modes do Austrian eco-certified producers prefer across markets, and what defines a "good" importer in this context?

The study makes three contributions. First, it reframes certification in certain markets as an access device rather than as a marketing embellishment. In the Scandinavian monopolies, sustainability and traceability expectations are written into tender routines, which turns third-party verification into a practical license to participate (Systembolaget, 2024). Second, it shows how the same seal functions as a signal with different strength depending on the receiving context since recognition and meaning are not uniform. A Demeter logo may carry broader name recognition beyond wine specialists, while respekt-BIODYN is often read more strongly inside professional circles. Third, it links value capture to capabilities and channels. Producers and the association converge on a simple pattern where certification helps secure the first meeting whereas price and repeat orders then depend on the producer–terroir–style package and on the importer's ability to make the story travel. The thesis specifies the importer capability bundle that appears to matter most: compliance literacy, portfolio and values fit, route-to-market coverage, brand stewardship, and operational reliability.

The approach of this thesis is of qualitative nature. I conduct semi-structured interviews with Austrian producers and a sector association, transcribe quotations, and analyze the material with a Gioia-style coding strategy that moves from first-order informant terms to second-order themes and aggregate dimensions. Four lenses organize the theoretical interpretation. The goal is not to estimate effect sizes but to trace mechanisms, show where they apply, and mark their limits.

The thesis proceeds as follows: Chapter 2 reviews the background covering certification landscape, export channels, and the three theoretical lenses, and sets out the empirical gap that motivates the study. Chapter 3 covers a short literature review covering present literature related to wine certifications and related fields of research. Chapter 4 covers the methodology, including case selection, interview procedures, coding, and steps taken to support trustworthiness and reflexivity. In chapter 5 I will present the findings with short, attributed quotations for each research question. Chapter 6 interprets the results through the four lenses and draws implications for producers, import partners, and policy. Lastly, chapter 7 concludes by answering the research questions in compact form, outlining the main contributions, and pointing to focused avenues for future work.

In sum, the study asks a straightforward question that sits at the center of many export conversations in Austrian wine. What does certification actually do in international markets, and under what conditions does it help a winery grow abroad? The answer that follows is pragmatic. Certification secures access where systems require it and helps reduce search costs where buyers reward it. Advantage then depends on capabilities and channels. Where these pieces line up, a seal becomes part of a durable export strategy. Where they do not, it is an introduction that does not carry very far.

2. The Austrian wine sector and its certification landscape

2.1 Global context

Organic viticulture has expanded steadily across the main producing regions over the past decade, and public buyers in several markets now treat third-party eco-labels as entry conditions rather than optional extras. Against this backdrop, Austria's unusually high organic share and the visibility of Demeter and respekt-BIODYN give the country an outsized role in the narrative around "credible sustainability." The sections that follow explain why Austria's structure, certification mix, and export routes make it an informative case for understanding how labels travel across borders.

2.2 A small-scale Industry with a global Footprint

Austria's vineyard surface hovers around 44 000 ha, half the size of Burgundy, yet the country exports almost two-thirds of its DAC whites and a growing share of its premium reds (Austrian Wine Marketing Board (AWMB), 2025b). The variety mix is the following: Grüner Veltliner alone occupies 32 % of total plantings, followed by Zweigelt (13,4 %), Welschriesling (5,8 %) and a handful of aromatic whites (AWMB, 2025b).

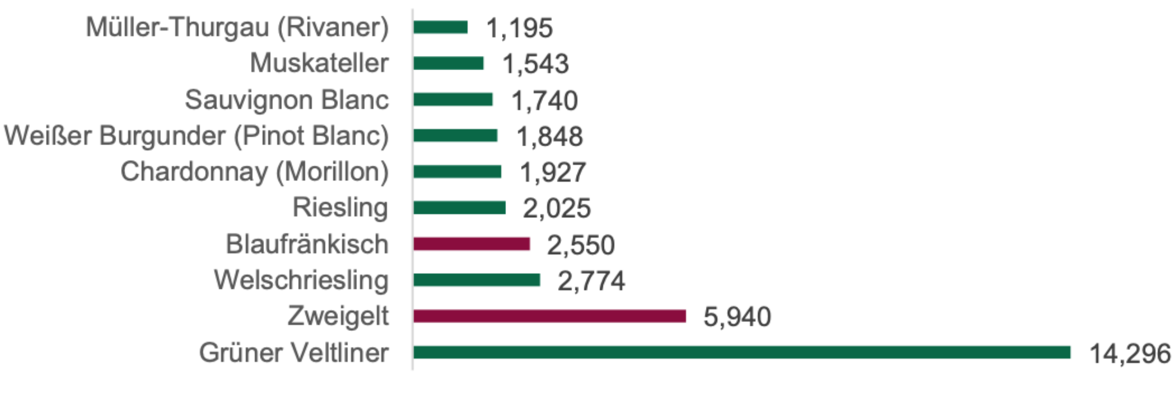

Figure 1: Top 10 Grape Varieties in Austria in 2024 (AWMB, 2025b, p.5)

Generally, Austria can be divided into 4 main wine growing regions: Niederösterreich, Burgenland, Steiermark and Wien. Out of them, Niederösterreich is by far the biggest one, occupying a share of over 60% of national vineyards, followed by Burgenland (25%), Steiermark (12%) and Wien (1%) (AWMB, 2025b).

Niederösterreich is the home of eight DACs: Wachau, Kremstal, Kamptal, Traisental, Wagram, Weinviertel, Thermenregion and Carnuntum. In all of them Grüner Veltliner dominates with around 50% of plantings, followed by the Zweigelt grape variety (AWMB, 2025b).

Burgenland poses as Austria's easternmost and warmest region, producing the biggest share of red wines in the country. Here, Blaufränkisch and Zweigelt are by far the most planted grape varieties (AWMB, 2025b).

Steiermark can be further split into 3 smaller DAC wine growing regions: Südsteiermark, Vulkanland and Weststeiermark. It is Austria's coolest wine growing region, further characterized by a presence of steep slopes and widespread hand harvesting. Sauvignon Blanc, Welschriesling and other white varieties dominate the terraces in this region (AWMB, 2025b).

Lastly, Wien with its vineyards across the suburbs of the city is worldwide unique: nowhere else in the world does a capital city host a commercially significant winemaking industry (AWMB, 2025b). By far the most produced wine variety is Wiener Gemischter Satz, a blend of local white grape varieties and characteristic for the city (AWMB, 2025b).

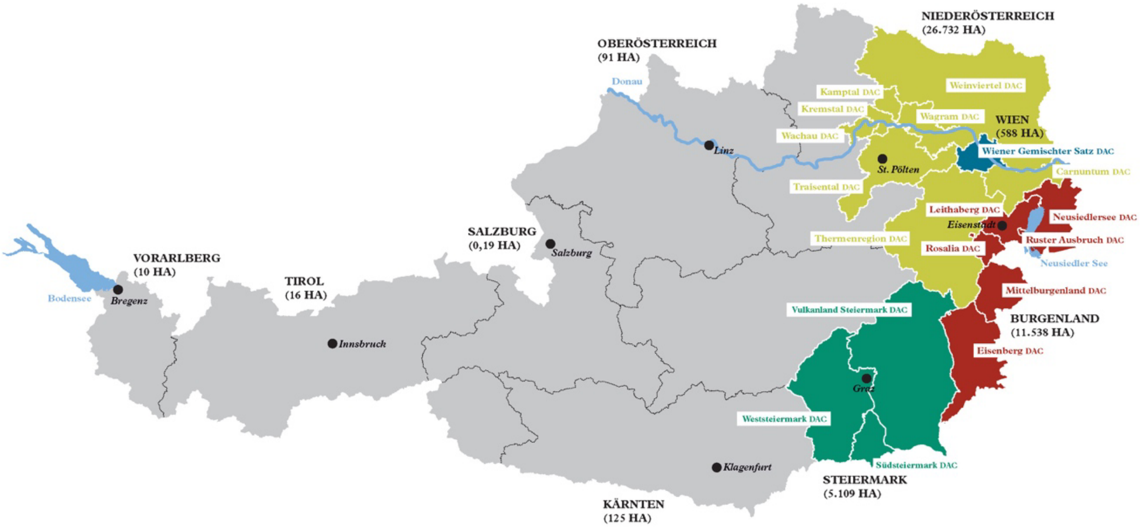

Figure 2: Austria’s Wine Growing Regions (AWMB, 2025c)

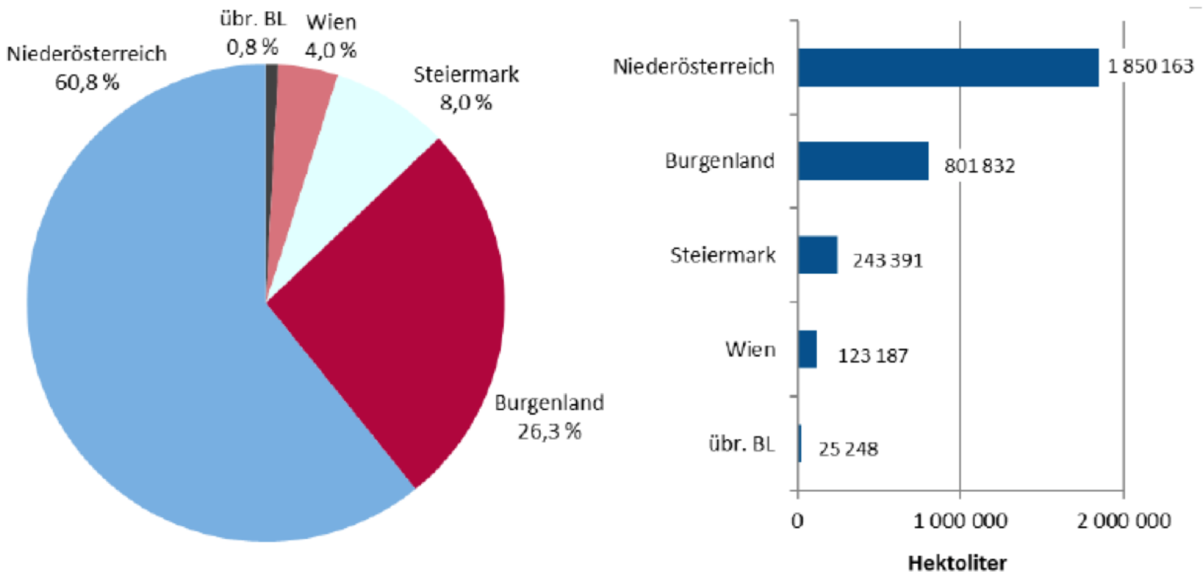

Figure 3: 2023 Austrian Harvest by State in 2024 (in Hectoliters), (AWMB, 2025b, p.39)

2.3 Organic Pioneers

The EU organic baseline—now codified in Regulation (EU) 2018/848—defines permitted inputs and audit intervals for organic wine across the Union (European Parliament & Council, 2018). Austria's strong engagement with organic and environmentally sustainable viticulture aligns with broader market evidence showing that consumers increasingly prefer wines produced with environmentally friendly practices (Galati et al., 2019). Today, the country hosts 10524 ha of organically certified vineyards, equal to 25 % of the national vineyard area which is the highest share among Europe's major producers (AWMB, 2025b). A subset of growers pursues biodynamic accreditation. Two seals dominate:

- Demeter Austria—the local arm of the 1924 Rudolf-Steiner movement—covers roughly 851 ha under vine and counts 68 member wineries (AWMB, 2025a)
- respekt-BIODYN, founded in 2007, is a winemaker-driven association that emphasizes soil vitality and sensory individuality; by 2025 it united 36 estates farming 1133 ha across Austria, Germany and neighboring countries. In Austria, the association has 21 members, covering 790 ha (AWMB, 2025a)

Both schemes add cosmic calendars, on-farm composts and strict cellar rules to the EU organic baseline but differ in governance: Demeter is a not-for-profit foundation, whereas respekt operates as a member cooperative with peer audits.

At the lighter end of the spectrum sits Sustainable Austria, a state-endorsed programme that audits 360 farm and winery metrics, from CO_2 footprints to bottle weights. By late 2025, 12324 ha carried this label; many growers pair it with an organic or biodynamic status (AWMB, 2025d).

Natural wine remains the regulatory outlier. Austria recognizes no official "vin méthode nature" analogue and therefore producers rely on self-declaration and market signaling. Some Demeter or respekt members nevertheless release un-sulphured cuvées aimed at the same consumer tribe, blurring boundaries on the shelf.

2.3.1 Demeter and respekt – BIODYN

The basic concept and principles of biodynamic viticulture according to Demeter and respekt – BIODYN share a large degree of overlap, however a few differences remain. Both certifications agree on the following:

- Ensure the use of exclusively organic fertilizers and the production of plant strengtheners following the principle of a self-contained farming cycle (AWMB, 2025a)
- Harvesting by hand favored (AWMB, 2025a)
- Spontaneous fermentation using natural yeasts (AWMB, 2025a)
- Sulphur usage as low as possible (max. amount defined by EU regulation on organic farming) (AWMB, 2025a)
- Soil cultivation, canopy interventions, and oenological processes coordinated with the biodynamic calendar’s planetary configurations (AWMB, 2025a)
- Use of anthroposophical medicine and homeopathy (AWMB, 2025a)

2.3.2 Demeter

According to Demeter itself, it is the world’s oldest organic association, following the same basic biodynamic principles all over the world, although certain standards differ between countries (AWMB, 2025a). Within the association, Austria enjoys the reputation of being a role model as the code of practice is particularly strict (AWMB, 2025a). The following points list the most important requirements for wineries to achieve Demeter certification:

- 100 % of grapes used must be Demeter certified (Demeter, 2025)
- Hand harvest preferred; mandatory in Austria (Demeter, 2025; AWMB, 2025a)

- Additional yeast only permitted to solve fermentation problems; in Austria solely spontaneous fermentation or use of the winery's own yeast allowed (Demeter, 2025; AWMB, 2025a)
- As little usage of acidity-regulating agents as possible and only permitted with lime, tartaric acid and potassium bicarbonate; acidification prohibited in Austria (Demeter, 2025; AWMB, 2025a).
- Raising alcohol by up to +1.5 % vol. is allowed with Demeter sugar or grape-juice concentrate (organic sources if Demeter grades are unavailable) (Demeter, 2025).
- 10% of a wineries land must be exclusively dedicated to biodiversity (Demeter, 2025)
- Prohibited: Adding enzymes, use of oak chips to add oak aroma, plastic or polystyrene vats (Demeter, 2025).

2.3.3 Respekt – BIODYN

Compared to Demeter, respekt – BIODYN exclusively focuses on viticulture and wine, and no other field of agriculture. The association aims to ensure "the highest possible degree of ecological, economic, social and emotional sustainability" (AWMB, 2025a) and ultimately to produce natural wines as unaltered as possible. Requirements to achieve respekt- BIODYN certification include:

- Use of 100% respekt – BIODYN grapes (respekt – BIODYN, 2017a; AWMB, 2025a)
- Harvesting by hand (respekt – BIODYN, 2017a; AWMB, 2025a)
- Spontaneous fermentation using only the natural yeast on the grapes themselves; additional yeast only permitted when fermentation is stuck (respekt – BIODYN, 2017a; AWMB, 2025a)

- Forbidden are: Fining agents of animal origin, making respekt – BIODYN certified wines vegan, as well as heat treatment, reverse osmosis, vacuum evaporation, and various substances (respekt – BIODYN, 2017a; AWMB, 2025a)
- Acidity corrections should be avoided; in exceptions: carbonated lime or tartaric acid may be used (respekt – BIODYN, 2017a; AWMB, 2025a)

Comparing the two, respekt-BIODYN is more prohibitive on additives and processing aids, aiming for vegan, low-tech wines and publishing a detailed black-list of inputs and processes (respekt – BIODYN, 2017a). On the other hand, examining the farm scope, Demeter remains broader and deeper: the entire holding must be biodynamic, annual whole-farm audits are mandatory, and mixed conventional–biodynamic operations are ruled out (Demeter, 2025). Both insist on hand-picking and spontaneous fermentations; respekt - BIODYN marginally tightens the rules by permitting only estate-propagated yeast if intervention is unavoidable (respekt – BIODYN, 2017a).

2.4 Export Patterns

Austria's export story is one of value resilience amid volume volatility. In 2024, export value slipped by 6.9 % compared to 2023, mirroring inflation-driven handbrakes across Europe (AWMB, 2025b; OIV, 2024). Germany continues to absorb the largest share of Austria's wine exports, accounting for more than 40 % of total export volume (AWMB, 2025b). Other northern European countries, including Sweden and Norway, together with markets such as the Czech Republic and the USA, have increased their purchases of Austrian wine in recent years (AWMB, 2025b). Switzerland, once the number two export destination by value, reduced its imports by 18.2 % in 2024, illustrating the exposure of premium-priced small-volume wines to currency and tourism dynamics (AWMB, 2025b).

Certified wines play a growing role in Austria's export profile. While detailed export turnover by certification type is not published, certified organic vineyards accounted for 22 % of Austria's total vineyard area in 2024 (AWMB, 2025a). Sustainability requirements in key buyer markets reinforce this positioning: Scandinavian alcohol monopolies such as Systembolaget in Sweden integrate environmental and traceability criteria into their tender procedures, explicitly rewarding third-party certifications in the procurement process (Systembolaget, 2024).

2.5 Regulatory Timeline

The regulatory setting that governs Austrian eco-wine exports did not appear in a single act. It took shape over time. A first decisive step came in 2012, when the European Union introduced organic winemaking rules alongside existing provisions for organic grape production. With that move, permitted cellar inputs and processing practices were finally specified, closing a long-standing gap between vineyard and cellar (European Commission, 2012). The framework was then consolidated through Regulation (EU) 2018/848, fully applicable since 1 January 2022, which harmonizes production rules, controls, and the use of the EU organic logo across Member States (European Parliament & Council, 2018). In parallel, the natural-wine niche received a national point of reference in France. The Vin Méthode Nature charter of 2020 set out expectations for fermentation, additives, and communication for wines marketed under that designation in France, and it has since informed debates on how "natural" should be understood and communicated elsewhere (Vin Méthode Nature, 2020).

Destination markets adjusted their requirements as well. In the United States, the Strengthening Organic Enforcement rule took full effect on 19 March 2024. It mandates electronic NOP Import Certificates for organic shipments and extends certification obligations further along the supply chain, which raises documentation needs for European exporters and their partners (USDA Agricultural Marketing Service, 2023). In Scandinavia, state alcohol monopolies such as Systembolaget refined tender procedures that place sustainability and traceability at the center of procurement, creating market-specific criteria that operate alongside EU law and shape eligibility in practical terms (Systembolaget, 2024).

Taken together, these developments have produced a layered architecture of Union-wide rules, private standards, and destination-market procedures. For Austrian producers, certification now does two things at once: It anchors compliance where tenders demand formal proof, and it serves as a recognizable cue in markets that reward credible environmental practice. As a result, certification functions both as a basis for legitimacy and as a communicative asset that reduces uncertainty for distant buyers (European Commission, 2012; European Parliament & Council, 2018; Systembolaget, 2024; USDA Agricultural Marketing Service, 2023).

3. Literature Review

3.1 Certification landscape and market context

Understanding wine certifications starts with the institutions in which they operate. The literature usually treats certifications as signals that help buyers navigate credence attributes, and as legitimacy devices that support access when practices cannot be observed directly. The legal framework and the private standards that build on it therefore form the backdrop for work on sustainability signaling and export performance.

At European level, organic wine is governed by Regulation (EU) 2018/848. Adopted in 2018 and fully applicable since 1 January 2022, it harmonizes rules for production, controls, and use of the EU organic logo. It also closes the long-standing gap between organic viticulture and organic winemaking by defining permitted inputs and processing practices (European Commission, 2012; European Parliament and Council, 2018). These harmonized rules underpin studies of how consumers and intermediaries interpret certified wines within the single market.

Private standards add further layers that shape environmental claims and everyday practice. Demeter and respekt-BIODYN both require biodynamic preparations and timing in line with natural cycles, and they tighten cellar rules around spontaneous fermentation, manual harvest, and restricted interventions that remain permitted under EU organic law (respekt-BIODYN 2017a; respekt-BIODYN, 2017b; Demeter Österreich, 2025). In present literature, such schemes illustrate how private governance creates different levels of environmental ambition and distinct market identities.

A related development concerns natural wine. In 2020, France introduced the Vin Méthode Nature charter, which formalizes expectations for fermentation, additives, and communication for wines marketed under that designation in France (Vin Méthode Nature, 2020). Although national in scope, the charter has become a reference point in broader debates about how natural wine is defined and communicated.

Import markets have also updated requirements in ways that matter for European producers. In the United States, the Strengthening Organic Enforcement rule took effect on 19 March 2024. It requires electronic NOP Import Certificates for organic shipments and extends certification obligations deeper into the import chain, which increases documentation responsibilities for producers and their partners (USDA Agricultural Marketing Service, 2023). In Scandinavia, state alcohol monopolies such as Systembolaget incorporate sustainability and traceability criteria into tender procedures, which act as a practical filter for eligibility in those markets (Systembolaget, 2024).

Within this wider context, Austria stands out for the prevalence of certified production. In recent years about one quarter of vineyard area has been certified organic, and biodynamic cultivation covered roughly 1431 hectares in 2024, or about three percent of total vineyard area (AWMB, 2025b). This concentration of certified vineyards, together with active biodynamic associations and a strong export orientation, makes Austria a useful setting for studying how certifications operate both as compliance structures and as market signals.

Taken together, the sources depict a layered certification landscape that combines EU rules, private standards, and destination-market procedures. This environment shapes how certifications are read and how they influence access, positioning, and performance in international wine markets. It also provides the conceptual footing for the research questions that follow.

3.2 Certification and Export Performance

At the macro level, gravity models show that geographical indications such as PDO/PGI can lift bilateral wine flows, especially on value (Agostino & Trivieri, 2014). Firm-level evidence on environmental certifications is thinner, but several studies associate quality or environmental seals with improved performance in specific contexts, while consumer-side research consistently reports willingness-to-pay (WTP) premia for sustainability attributes (Schäufele & Hamm, 2017; Sgroi et al., 2023; Vecchio et al., 2023). To date, however, Austria's eco-certified cohort has not been isolated systematically, which leaves a clear empirical lacuna.

3.3 Compliance Burdens and regulatory Headwinds

Compliance is dynamic and destination specific. Within the EU, Intrastat and excise procedures already add administrative friction for exporters. Outside the bloc, the USDA Strengthening Organic Enforcement (SOE) rule, fully effective 19 March 2024, extends mandatory organic certification deeper into the supply chain, requires electronic NOP Import Certificates, and tightens auditability for organic products entering the United States (USDA Agricultural Marketing Service, 2023). Trade guidance and practitioner reports note higher transaction costs and shipment delays for small wineries navigating these changes, although academic treatment of SOE's wine-specific effects remains emergent.

3.4 Brand identity, pricing and consumer response

A substantial literature links sustainability cues to consumer valuation. Existing reviews report positive but heterogeneous willingness-to-pay premia for organic and related attributes, with variation across countries, consumer segments and study designs (Schäufele & Hamm, 2017). Primary studies complement this pattern. In Italy, natural-wine buyers express higher willingness-to-pay when label information is clear and credible (Galati et al., 2019). Survey evidence from the United States shows that defined consumer segments, particularly younger consumers and women, indicate willingness-to-pay premia for eco-certified wines (Moscovici et al., 2021). Cross-country experiments suggest that organic cues tend to attract the highest valuation, while biodynamic and natural claims vary more strongly with familiarity and context (Vecchio et al., 2023).

At the same time, sustainability cues interact with more established informational and social heuristics. Origin and appellation function as quality indicators that help consumers reduce perceived risk and navigate choice under uncertainty (Atkin & Johnson, 2010). These interaction effects help explain why the return to eco-labels differs across markets and consumer groups.

3.5 Export-mode selection

Export-mode choices reflect market design as much as firm characteristics. In the United States, wineries operate within a legally mandated three-tier system that separates importers, state-level wholesalers, and retailers, shaping who can sell to whom and how brands are built (Wine Australia, n.d.). In the Scandinavian markets, state alcohol monopolies govern procurement through tenders and emphasize sustainability and traceability throughout the chain, converting environmental practice into an eligibility condition in some listings rather than a differentiator

(Systembolaget, 2024). How eco-certified producers balance control, integrity, and storytelling across importer-led channels remains under-explored, particularly for Austrian firms.

3.6 Theoretical Framework

3.6.1 Signaling Theory

Signaling theory explains how actors convey credible information when quality is hard to observe (Spence, 1973). A signal must be visible, costly and difficult to imitate; otherwise, it collapses into cheap talk (Connelly et al., 2011). In the wine sector, organic and biodynamic certifications meet these conditions. The logos are immediately recognizable, conversion requires several years of changed practice, and third-party inspections verify compliance and deter imitation, as shown in the EU organic rulebook and in the production and cellar standards of Demeter and respekt-BIODYN (respekt-BIODYN, 2017a; respekt-BIODYN, 2017b; Demeter Österreich, 2025). For wineries without established brand equity, these certifications can function as reputation shortcuts during initial contact with importers and trade partners. In my research, the signaling lens helps to clarify which certifications facilitate entry, and how and with whom these signals support early market access.

3.6.2 Institutional/Legitimacy Theory

Signals attract attention, but they do not guarantee acceptance. Institutional theory argues that firms must align with regulative, normative, and cognitive pillars to obtain and maintain legitimacy (Scott, 2014). Coercive and normative isomorphic pressures encourage exporters to adopt widely recognized standards, such as compliance with the National Organic Program requirements in the United States, reinforced through the Strengthening Organic Enforcement rule, or the tender criteria applied by Systembolaget in Sweden (DiMaggio & Powell, 1983; USDA Agricultural Marketing Service, 2023; Systembolaget, 2024). In this sense, certification functions as a license to operate that reduces the risk of rejections and reputational friction (Suchman, 1995). This lens frames prompts on regulatory friction and legitimacy work: which rules feel burdensome, which audiences matter, and how do wineries signal conformity beyond the label?

3.6.3 Resource-based view

The resource-based view shifts focus inside the firm. Certifications create advantage when they are embedded in VRIN bundles, meaning resources that are valuable, rare, inimitable, and non-substitutable resources (Barney, 1991). On their own, logos are easily copied, but when combined with site-specific assets such as terroir, reputation, channel relationships and the producer's narrative capabilities, they can contribute to more durable value capture. A dynamic-capabilities perspective clarifies how firms sense market schemas, seize opportunities with market-appropriate messaging, and transform routines to fit institutional constraints (Teece, 2007). In this study, RBV helps probe value capture rather than only access, asking how producers weave the seal into brand identity, pricing logic, and channel decisions.

Together, the three perspectives form a chronological arc:

1. Signal: the seal draws buyer attention in a crowded marketplace.
2. Legitimacy: adherence to recognized standards secures stable market access.
3. Resource: the seal, embedded in firm-specific capabilities, supports long-run advantage.

3.7 Synthesis and gap

The literature agrees that certifications can signal process quality, facilitate access, and sometimes raise willingness to pay. Yet four deficits remain:

1. Austria is underrepresented, despite its high organic and biodynamic share
2. Quantitative models dominate, sidelining the lived experience of compliance, branding, and channel negotiation.
3. Biodynamic tiers are rarely taken into account
4. Very little about how branding, compliance, and channel choice evolve together across markets is known.

A qualitative, interview-driven inquiry centered on Austrian eco-certified producers is therefore well placed to advance theory at the intersection of signaling, legitimacy, and resource-based advantage, and to document how institutional designs in the US and Scandinavia shape exporter choices.

4. Methodology

4.1 Research design

This study examines how wine certifications shape the export strategies of Austrian biodynamically certified producers. The question is exploratory and mechanism-seeking rather than hypothesis-testing. I therefore adopt a qualitative, multiple-case design that allows fine-grained comparison across wineries and one sector association. The approach privileges producers' own categories and practices, and then moves to a structured abstraction that links their accounts to established theory (Eisenhardt, 1989; Yin, 2018).

4.2 Case selection and sampling

Cases were selected purposefully to cover variation among Austrian producers with formal biodynamic certifications (e.g. Demeter, respekt-BIODYN) and to include the perspective of a sector body involved in biodynamic certification and communication. Inclusion criteria were: (i) certified biodynamic production, (ii) active export activity, and (iii) willingness to discuss certification's role in channels, pricing, brand positioning, and compliance. The final corpus includes three wineries and one association representative. To preserve anonymity in the analysis, wineries are referred to as WZ1, WZ2, WZ3, and the association interview as PR.

4.3 Data collection

Data were generated through semi-structured interviews conducted in German via Zoom and Google Meet between July and October 2025. The interviews covered export routes and partner selection, the perceived effects of certification on access and sales, administrative and legal hurdles, brand management, and pricing logic. Interviews lasted between twenty and thirty minutes, were audio-recorded with consent, and transcribed.

Recruitment relied on direct outreach to producers and certification bodies using a standard email template. The study followed university ethics guidelines and participants could decline to answer any question and could withdraw at any time without consequence.

4.4 Data handling and anonymity

All recordings and transcripts were stored on media accessible only to the researcher. Identifying information was removed from analytic files. Each quotation in the Findings is attributed with CaseID and a timecode (start–end) to preserve an audit trail from claim to source. Original language quotes are archived and can be examined on request under the conditions set in the consent form.

4.5 Analytical strategy

Analysis followed a Gioia-style procedure that links informant terms to researcher-centric themes and aggregate concepts (Gioia et al., 2013).

For the first-order coding, transcripts were coded close to informant language, producing a detailed set of descriptive codes. As all interviews were conducted in German, first-order codes were kept in the original language to preserve informant meaning and avoid early translation drift. Abstraction into English occurred only at the level of second-order themes. Coding was done in Taguette and exports were analyzed in Excel.

First-order codes were compared and clustered into second-order themes that captured underlying mechanisms. Examples include Direct effects of certification, Terminology and labeling law, Export compliance, Price formation and value capture, Brand management and narrative use, Channel strategy, and Market entry and growth paths. To conclude the coding process, second order themes were mapped onto four aggregate dimensions that structure the explanation: Legitimacy (institutional rules and acceptance), Signal (how logos reduce uncertainty), Resource (capabilities and value capture), and Channels (routes to market and partner quality), which emerged empirically as a fourth aggregate alongside the three theoretical lenses introduced in the literature review.

To avoid over-claiming, I built two simple cross-case displays in Excel: a coverage matrix showing whether a theme appears in each case at all, and an evidence matrix showing where a theme is backed by a quotable excerpt selected for the thesis. Quotations were kept short, tagged with CaseID and timecode, and marked in the quote bank. This step ensures that cross-case claims are supported by data from at least two cases, while single-case insights are treated as vignettes rather than general patterns.

Throughout, I iterated between codes, themes, and raw excerpts, writing memos that captured decisions to merge or split codes and the reasons for the final theme labels.

4.6 Role of theoretical lenses in the analysis

The theoretical framework is introduced in the Literature Review (Chapter 3), where I summarize signaling theory (Spence, 1973), institutional and legitimacy theory (DiMaggio & Powell, 1991) and the resource-based view with a dynamic-capabilities extension (Barney, 1991; Teece, 2007). The framework is not applied deductively to shape the data. Instead, once second-order themes were stable, I interpreted them through these lenses. Entry requirements and traceability obligations were read as Legitimacy phenomena. Direct effects of certification and geographic signal strength aligned with the Signal lens. Price formation and value capture, together with brand management and narrative use, reflected Resource-related mechanisms. Channel strategy formed a fourth aggregate dimension that emerged empirically and is grounded in market structure, including the US three-tier system and Scandinavian monopoly procurement.

4.7 Trustworthiness and quality

Credibility was supported by data–display coherence (coverage versus evidence), by verbatim quotation with timecodes, and by theme definitions aligned with the codebook. Dependability rests on a documented workflow (Taguette exports, versioned Excel sheets). Confirmability is addressed by keeping raw excerpts and transferability is enabled through concise case vignettes and explicit market contexts so that readers can judge fit with comparable settings.

4.8 Researcher reflexivity

I started my research with the expectation that biodynamic seals would help export performance but remained open to null or negative effects. To reduce confirmation bias, I required at least two cases to support any cross-case claim and labelled single-case observations as boundary conditions.

4.9 Scope and limitations

The design gives access to mechanisms that do not travel well in survey form, such as how a label is read in a tender, or how importer capabilities affect route-to-market execution. It does not estimate effect sizes either and the sample is producer-side and Austrian by design. I will address these boundaries in the Discussion and Limitations and point to complementary designs for future work.

5. Findings

5.1 Overview

This chapter reports what the interviews reveal about the role of eco-certification in Austrian wine exports. The section is organized by the four research questions and integrates evidence across producers and the association interview. Throughout, I indicate the lens that best explains each pattern. The coverage matrix shows that the most frequent and cross-case themes sit in Legitimacy and Channels, with Signal and Resource playing complementary roles. The evidence matrix confirms that each core theme is evidenced by quotations from at least two cases. Background items such as hectares, varieties, and years in export are used as case context rather than headline findings.

5.2 RQ1: Do certifications drive export success?

5.2.1 Direct effects of certification (Signal)

Across cases, certifications deliver access more reliably than they deliver sales uplift. Producers describe certificates as a visible badge that lowers search costs for importers in some markets, particularly where buyers face information gaps. At the same time, respondents caution that the logo alone rarely moves volumes or prices in mature channels, or in one case even, barely has any effect on sales.

„Also in den meisten Fällen würde ich sagen, das ist ein nettes Add-on als Zusatznutzen oder Zusatzfeature, wenn es bekannt ist, überhaupt." WZ3, 05:38 – 05:51

„Hat mir gar nichts gebracht, verkaufstechnisch, es ist leider total erschreckend, aber es ist so." WZ1, 3:41 - 3:56

This is a clear Signal effect. The logo is read as a shorthand for process quality and, therefore, gets attention and can unlock first meetings, but downstream performance depends on the portfolio and fit. At the same time, as highlighted by the quote from WZ1, a clear positive effect of such a logo is not guaranteed.

5.2.2 Geographic signal strength and acceptance (Signal)

The signal is not uniform. Respondents consistently point to Scandinavia and parts of the United States as the most receptive environments for eco-labels. Elsewhere the effect is weaker or filtered through importer preferences.

„Also USA denke ich auf jeden Fall. Speziell die skandinavischen Märkte. Also alle, die darauf Wert legen, dass ihre Partner zumindest in irgendeiner Form ökologisch sind." VERB-PR, 13:47-14:14

„...der Mehrnutzen an Demeter und Bio hat dann schon sehr stark mit dem Distributionsnetz in der Struktur des Händlers oder des Landes, wo man ihn exportieren will, zu tun." WZ2, 09:50 – 10:10

This points again to a Signal mechanism. Buyers in these geographies are primed to read eco-labels as quality cues, and some public buyers even request them in tenders.

5.2.3 Certification as entry requirement in tenders and public retail (Legitimacy)

In several Scandinavian markets, certification is not only a signal but an entry condition. Producers without the relevant seal cannot submit to tenders or face practical barriers in state retail.

„…, wenn man die skandinavischen Länder anschaut … da kann man einfach auch nicht mitmachen, wenn man diese Zertifizierung nicht hat.“ WZ2, 10:15 - 10:30

„Viele Exportmärkte verlangen inzwischen eine Nachhaltigkeitszertifizierung.“ VERB-PR, 22:52 - 23:06

While direct effects and acceptance of said logos relate rather to a Signal, formal certification as entry requirements falls into the Legitimacy sphere. In this case, any type of ecological certification functions as a formal rule that governs market access.

To answer RQ1, certifications help producers get into the room, especially in Scandinavia and parts of the US. Their sales effect is uneven. Where the seal is an entry rule, the benefit is access rather than differentiation.

5.3 RQ2: What regulatory challenges shape market access?

5.3.1 Export compliance: documents and processes (Legitimacy)

All cases report a significant documentation workload for export. The burden is felt most when procedures are not digitized or when paperwork differs by destination.

„Ja, immer, das ist immer mühsam im Export, allein diese ganzen Begleitpapiere, Dokumente, was das Zeit und Nerven frisst und mit den Speditionen, die sich dann nicht auskennen und dann im Nachhinein reklamieren, alles mühsam.“ WZ1, 3:56 - 4:29

„…, wenn du Bio-und Demeter-Weine verkaufen willst in Amerika, dann muss mittlerweile auch der Händler zertifiziert sein …“ WZ2, 12:20 - 12:30

„Also in vielen asiatischen Ländern brauchst du ein sogenanntes Ursprungszeugnis, das heißt, du musst Etiketten, Rechnungen, Lieferscheine abstempeln lassen, das wird geprüft und ohne dem kannst du nicht exportieren, …" WZ2, 11:20 – 11:35

This issue points to a Legitimacy mechanism. Producers invest time to follow administrative thresholds that prove conformity. The task does not add sensory quality, yet it is required for trade.

5.3.2 Terminology and labeling law (Legitimacy)

Several markets, such as the US and South Korea, restrict specific wording on labels and invoices. References to “organic” or “biodynamic” can be disallowed or tightly regulated, and some buyers explicitly ask that such terms be omitted from documents to avoid extra steps.

„Und Bio kann man sowieso nicht auf das Etikett schreiben in Amerika, weil das grüne Blatt oder der Green Leaf, wie es so schön heißt, in Amerika nicht erlaubt ist” WZ2, 12:58 - 14:00

"Und unser amerikanischer Importeur hat ursprünglich gar nicht gewollt, dass wir Demeter oder biodynamisch auf dem Etikett erwähnen. Also die wollten möglichst wenig draufstehen haben." WZ3, 18:22 - 18:43

„…, sie wollen es gar nicht erwähnt haben, weil es quasi in ihrem Land nicht erlaubt ist." WZ3, 10:45 - 11:00

The constraint is legal and procedural rather than commercial, directly shaping how the certificate can be communicated. Therefore, this issue relates to the Legitimacy framework.

5.3.3 Administrative burden and desired improvements (Legitimacy)

Interviewees describe a persistent administrative load and propose digital portals, simpler forms, and clearer guidance. Producers also mention tariffs in non-EU markets as material frictions.

„Das ist jetzt mehr zeitintensiv und ärgerlich, dass man das nicht online machen kann, weil in Wien zum Beispiel muss ich die Wirtschaftskammer Wien fahren, muss meine Dokumente dort lassen, das dauert einen Tag. Vor Covid haben sie es an einem Tag gemacht, jetzt dauert es einen Tag.“ WZ2, 11:36 – 11:55

„...zum Beispiel Thailand, wo ein paar Hundert Prozent drauf sind, oder auch Indien ist wahnsinnig hoch besteuert, dass man sich wünscht, dass biodynamische Weine zum Beispiel mit niedrigeren Zöllen belastet werden, weil wenn man eine werthaltigere Arbeit liefert und einen besseren Carbon Footprint und einen Beitrag zur Weltgesundheit..." WZ3, 22:52 – 23:48

These are clear Legitimacy frictions that raise the overall cost of exporting but can be alleviated by policy and process design.

To answer RQ2, market access is governed by documents, wording rules, traceability, and duties. These requirements do not change the wine, but they determine whether the wine may move. Producers wish for digitisation and simplification of bureaucratic processes.

5.4 RQ3: How do certifications shape brand, pricing, and positioning?

5.4.1 Brand management and narrative use (Resource)

All wineries integrate certification into their story. They differ, however, in how prominently it features. Some prefer a light touch in markets where the term invites long explanations. Others use the seal to anchor a broader narrative around practice, place, and transparency.

„Also ich würde sagen, ich transportiere es wo immer möglich und wo immer ich kann. Das ist einer der ersten Säulen, dass ich natürlich stolz bin auf meine Partner…” WZ2, 15:30 - 15:45

„Wir kommunizieren natürlich auf der Flasche, auf der Homepage, Social Media, also es ist schon Teil unserer Informationskampagne, wenn man so will, also das ist ein selbstverständlicher Teil dessen, was wir kommunizieren." WZ3, 15:25 - 16:39

„Und ich muss das ehrlich gesagt einfach besser integrieren auf meiner Homepage. Meine Homepage gehört komplett überarbeitet, da ist das noch nicht so drauf, Ich mach das eigentlich weniger." WZ1, 6:25 - 6:39

Brand management and narrative use of biodynamic certifications correspond to Resource. The skill lies in translating practice into a credible, audience-appropriate story that supports partner trust.

<u>5.4.2 Price formation and value capture (Resource)</u>

Respondents repeatedly state that certification is not the direct price lever, instead, the producer-terroir-style triad carries pricing power. Price levels are attached to the package: producer reputation, terroir, style, and a transparent way of explaining these elements. Certification can support the narrative, yet it does not substitute for reputation and quality.

„Nein, für mich hat die Zertifizierung keinen Einfluss auf den Preis gebracht. Der Preis hängt ganz stark mit Image zusammen, wobei Image beim Wein eher an andere Parameter gebunden ist und nicht so sehr an die Wirtschaftungsweise." WZ3, 16:30 – 17:26

„Es ist das Gesamtpaket. Es steht auf Feld, wie ich vorher gesagt habe, Mensch, Respekt oder Bewirtschaftung im bestmöglichen Maße der Natur, also Boden, Terroir und dann auch das Gesamtpackaging …" WZ2, 17:20 - 17:40

While certifications like respekt or demeter do not impact price formation directly, WZ2 argues that starting at a certain price level for wines, organic certification is generally seen as a mandatory sign for quality.

„Wenn du eine gute Qualität hast und nicht Bio bist, wird es sehr schwierig zu erklären ab einem gewissen Preissegment." WZ2, 09:05 – 09:15

These dynamics point towards a Resource logic. Producers that can articulate their package clearly are better at realising value, independent of the seal. Furthermore, capabilities in vineyard and cellar, combined with identity work, produce the quality that markets are willing to reward.

5.4.3 Target audience and segmentation, and market touchpoints (Signal)

Certified wines often reach a partly distinct, or, niche audience, especially where buyers seek formal assurance of sustainable and biodynamic practice. Producers adjust touchpoints by country, with less detail on biodynamics in markets where wording is sensitive, and more direct communication in receptive markets.

„Je mehr man sich mit Wein auskennt, desto eher ist natürlich Bio, Demeter, Regenerative Organic interessant, weil natürlich das das Segment ist, wo man etwas wissen muss." WZ2, 18:55 - 19:07

„Da bin ich mir auch nicht ganz sicher. Manche Länder sind natürlich etwas empfänglicher, zumindest skandinavische Länder, die da vielleicht mehr Wert darauflegen, wobei ich auch gehört habe von den Einkäufern von Maiflu Wines in Schweden oder Norwegen, dass eigentlich ein nachhaltiges Zertifikat wichtiger wäre im Verkauf sozusagen. Es ist griffiger, wenn das mit diesen Punkten im Systembolaget, dem Monopol zum Beispiel, ausgezeichnet werden kann. Das ist quasi ein bisschen eindeutiger zuordenbar und daher quantifizierbarer.“ WZ3, 17:45 – 18:25

This is a Signal effect that interacts with the Resource story capability. The same practice is framed differently for different listeners. In this case, consumers with a deeper knowledge about wines and viticulture as well as consumers in Scandinavian countries seem to respond well to biodynamic certifications.

To answer RQ3, certification lives inside the brand narrative and can help target specific segments. Price is anchored in the producer-terroir-style package and in the clarity with which it is communicated.

5.5 RQ4: What export modes do producers prefer?

5.5.1 Channel strategy and partner fit (Channels)

All wineries rely on importer-led export. Respondents describe careful partner selection, often over long cycles, with emphasis on portfolio fit and shared values.

„Ich habe jetzt in Japan sehr lange selektiert, bis ich tatsächlich den richtigen Importeur gefunden habe." WZ1, 9:50 - 10:13

The capability is not to bypass intermediaries, but to pick the right ones and to support them with clear stories and reliable compliance.

In the United States, producers describe a general importer model that feeds state-level distributors. In Scandinavia, producers often work with single importers per country and adapt to monopoly procedures.

„Also das hängt natürlich sehr stark von den Ländern ab, wie vorhin gesagt. Es gibt unterschiedliche Markteintrittsprojekte. In Amerika fahre ich ein zentralistisches System, in dem ich sage, ich habe einen Generalimporteur, eine Ansprechperson, und der verteilt dann über seine Kanäle an unterschiedliche Distributeuren in unterschiedlichen Staaten, und die wiederum an Retailer und oder Restaurants direkt." WZ2, 19:20 – 20:30

„Also es sind in erster Linie Generalimporteure natürlich, die dann verteilen, wenn wir jetzt bei USA, an die Distributeure in den einzelnen Bundesstaaten in dem Fall. Also da hat der Generalimporteur, der jetzt in unserem Fall in New York sitzt, hat Eigendistributionen, ich weiß gar nicht wie viel, 13, 14 in den Staaten und sonst auch Partner, die die Weine distribuieren." WZ3, 18:46 - 19:54

„In den skandinavischen Ländern haben wir meist auch einen Importeur, der dann an die kleineren Händler und Gastro verteilt." WZ3, 19:54 - 20:12

The choice of export channels is clearly shaped by national institutions. The route to market is a design choice within external constraints.

Across cases, importer-led exporting is the default. Partners are chosen selectively and often on a one-country basis. The best importers combine compliance know-how with a values-based portfolio fit, actual route-to-market coverage, careful brand stewardship, and reliable operations. These features interact with certification: the seal opens doors in receptive markets, but the importer's capability determines whether those doors lead to lasting sales. In the United States producers typically work with a general importer who coordinates state-level distributors, while Scandinavia is managed through single-country partners and monopoly procedures

5.6 Cross-lens synthesis

The findings show a consistent separation between access and advantage.

Access is secured by Legitimacy. Certificates act as entry rules in some geographical markets. Documents, wording, and traceability allow trade to occur. Policy and process design determine the friction level.

Advantage is achieved through Resource. Producers who turn practice, site, and identity into a convincing story capture value more reliably. Certification helps the story but does not replace it.

Signal explains why logos matter more in some markets than others. Buyers read the badge through local norms and expectations.

Channels translate these forces into practice. Partner choice and market structure shape who hears the story and how quickly bottles move.

In short, certification is a necessary condition in some places and a useful signal in others. It becomes a competitive asset when it is embedded in a coherent offer, told with clarity, and delivered through the right partners.

5.7 Robustness and boundary conditions

Two drawbacks influence the patterns above. First, effects are market dependent. Where public buyers specify eco-criteria, certification functions as a rule. Where private buyers rely on tasting and portfolio fit, the badge has less weight. Second, price effects are indirect. Labels may widen the audience or reduce search costs, yet premiums attach to producer reputation, terroir, and style.

The coverage and evidence matrices reduce the risk of over-claiming by ensuring that each core theme is supported by quotes from multiple cases. Single-case observations are reported as vignettes and do not anchor cross-case claims.

5.8 Practical implications

For producers, the data suggest three priorities. First, treat compliance as an operational capability. Clean documents, clear wording, and traceability unlock market access at lower cost. Second, invest in story craft. Explain practice and place in a way that fits the listener. Third, select partners deliberately. Good importer fit and stable routines often matter more than adding another logo.

For policy and market bodies, the interviews highlight digital portals, harmonized documents, and clear guidance on wording as practical levers to lower administrative burden without weakening standards.

5.9 Summary of findings

RQ1. Do certifications drive export success?

Across cases, certifications improve access more than they generate sales uplift. The seal works as a visible cue in receptive markets and in public tenders. In Scandinavia it often functions as an entry requirement, not merely a differentiator. Outside those contexts, the logo is a helpful but insufficient condition for growth; performance depends on portfolio fit and partner execution.

RQ2. What regulatory challenges shape market access?

Market access is governed by documents, wording rules, traceability obligations, and duties. Producers report time-intensive paperwork, restrictions on terms like “organic” or “biodynamic,” and bottle-level traceability in monopoly markets. These are legitimacy thresholds: they do not change the wine itself, but they determine whether the wine may move. Interviewees consistently ask for digitization and simplification.

RQ3. How do certifications shape brand, pricing, and positioning?

Certification is woven into the brand story, but price formation relies primarily on the producer–terroir–style package and on clear, credible communication. The seal can help target a distinct audience and reduce search costs, yet price premia attach to producer reputation, site, style, and transparency rather than to the logo alone.

RQ4. What export modes do producers prefer, and what defines a good importer?

Exporting is importer-led across markets. In the United States, producers work through a general importer and state-level distributors; in Scandinavia, they typically appoint one importer per country and follow monopoly procedures. Good importers combine compliance literacy (documents, label wording, traceability), portfolio and values fit (experience with organic/biodynamic portfolios), real route-to-market coverage (on-trade and off-trade access), brand stewardship (education, price integrity, adapted messaging), and operational reliability (ordering rhythm, forecasting, payments). Certification helps select eligible partners, but sustained results depend on these importer capabilities.

This chapter showed that certification supports export growth primarily by securing access rather than by directly creating advantage. Where certification is treated as a rule of entry, as in parts of Scandinavia, it enables participation and shortens search for buyers. Where certification is read as a signal among many, it helps first contact but has limited power on its own. Price realization rests on the producer–terroir–style package and on clear, credible communication. Export channels are importer-led across markets, with outcomes depending on the importer's compliance literacy, portfolio fit, route-to-market coverage, stewardship, and operational reliability.

Taken together, the findings map cleanly onto the four lenses used throughout the study. Legitimacy explains the gates that must be passed for wine to move. Signal explains when and where eco-logos reduce uncertainty for distant buyers. Resource capabilities turn practice and place into value that buyers are willing to pay for. Channels translate access and capability into repeat sales. Export performance is strongest when these four elements are aligned: the producer meets the institutional threshold, the logo is recognized in the target market, the firm can tell its story well, and the importer can carry that story to the right accounts.

The results also mark boundaries. Certification alone does not guarantee price premia, and administrative requirements continue to absorb time that could otherwise be spent on market development. The interviews point toward practical levers: smoother digital procedures, clearer wording guidance, and importer development focused on education and price integrity. These implications motivate the next chapter, where I discuss how the findings refine existing theory and what they mean for producers, import partners, and policy actors.

6. Discussion and Implications

This chapter interprets the empirical findings and explains what they mean for theory and practice. I organize the discussion around four analytical lenses that have guided the study: Legitimacy, Signal, Resource, and Channels. The first part synthesizes the results into a simple distinction between access and advantage. Certification helps producers pass formal gates and secure entry. Long-run performance depends on capabilities and routes to market. I then link these patterns back to the literature and state the study's contributions. The chapter closes with practical implications for producers and import partners, policy implications, a short section on robustness and limitations, suggestions for future research, and a brief conclusion. Wherever I quote, I attribute case identifiers and timecodes; translated excerpts are marked accordingly. Theme labels follow the English terminology used in the codebook.

This structure reflects established theory touchstones on institutions and legitimacy, signals under information asymmetry, and capabilities as drivers of value capture, as well as sector-specific guidance on monopoly retail and the US three-tier system.

6.1 Interpretation of Findings

6.1.1 Certification as access

Across cases, certification first functions as a key that opens doors. Respondents describe a predictable sequence before a shipment moves: destination-specific documents, careful wording on labels and invoices, and a traceability trail that in some monopoly markets, according to participants, must reach down to the bottle. Scandinavian alcohol monopolies publicly anchor procurement in sustainability and traceability, which moves environmental practice from a marketing cue to an administrative threshold for eligibility in tenders and listings. This is an institutional dynamic in which regulative and normative pillars define the boundaries of acceptable action (Systembolaget, 2024).

Treating access as an operational capability follows directly. The wineries that move smoothly standardize export paperwork, maintain market-specific wording templates for terms such as “organic” or “biodynamic,” and keep a clean audit trail for lots and bottlings. These tasks do not change sensory quality, but they reduce friction and cost by aligning with the receiving system’s expectations.

6.1.2 Certification as signal

Beyond access, certification can signal process quality to distant buyers under information asymmetry. Interviewees converge on Scandinavia and parts of the United States as the most label-sensitive environments, while other markets read the badge more weakly or through the importer’s framing. This aligns with signaling logic in markets with uncertainty about true quality and with reviews that find positive yet context-dependent willingness-to-pay effects for sustainability attributes in wine.

Recognition asymmetries between labels matter at first contact. According to the interviewees, Demeter often enjoys broader name recognition outside narrow wine circles, while respekt resonates inside certain professional communities. These differences shape who grants first meetings, yet the interviews also show that they do not determine long-run demand without alignment on style, portfolio and price.

6.1.3 Capability plus channel

When producers discuss price and repeat orders, the badge alone does not carry the premium. Value is realized through a package of producer reputation, terroir, and style, presented clearly and consistently. In RBV terms, advantage sits in resources and capabilities that are valuable, sometimes rare, and difficult to imitate (Barney, 1991). A dynamic-capabilities perspective highlights how firms sense market expectations, seize opportunities through appropriate positioning and communication, and transform routines to align with evolving institutional constraints (Teece, 2007). Certification supports the narrative by making claims legible, but it does not substitute for the underlying craft or for the capability to tell the story well.

Channels then determine how much of this potential becomes sales. All wineries in this study use importer-led routes. In the United States, a general importer coordinates state-level distributors within a legally mandated three-tier system (Wine Australia, n.d.). In Scandinavia, producers typically appoint one importer per country and work within monopoly procurement. These structures are well-documented in trade guidance and in official materials, and they match the structures respondents describe (Systembolaget, 2024).

6.2 Theoretical contributions

6.2.1 Institutional theory/Legitimacy

Prior work often treats certification as an attribute on a label. The interviews extend this by showing certification as license-to-operate in specific geographies. Paperwork, terminology constraints, and traceability are not mere noise but rather institutional boundaries that determine whether wine may move through a system. This reflects the regulative and normative pillars outlined in institutional theory, which define acceptable action and shape the compliance work required of firms in different markets (Scott, 2014). These dynamics help explain why producers invest repeatedly in administrative competence that does not alter the sensory properties of the product.

6.2.2 Signaling theory

Classic signaling predicts that observable, costly signals can reduce uncertainty and shape selection under information asymmetry (Spence, 1973). The present study adds a market-contingent layer: according to participants, the same eco-logo is read as a strong cue in Scandinavia, and as a weaker one elsewhere, because public tender rules and local schemas differ. Recognition asymmetries between Demeter and respekt affect first impressions more than price formation, based on my cases. This context dependence mirrors the variability documented in sustainability cue research in wine.

6.2.3 RBV and dynamic capabilities

The findings separate possession of a certificate from the capability to convert practice and place into value. Price is anchored in producer identity, site, and style, which are difficult to imitate and therefore fit the VRIN logic (Barney, 1991). The ability to craft and adapt the narrative across markets resembles a dynamic capability that helps firms sense buying criteria, seize opportunities with market-appropriate messaging, and transform routines to fit institutional constraints (Teece, 2007).

6.2.4 Export channels and strategy

The study specifies importer-led architectures for Austrian eco-certified wineries and details the capability bundle that differentiates effective import partners: compliance literacy, portfolio and values fit, route-to-market coverage, brand stewardship, and operational reliability. In the US, the evidence aligns with the legally mandated three-tier system and with the distinction, noted by interviewees and trade guidance, between selling importers that build demand and clearing importers that handle logistics and compliance but do not drive the brand.

6.3 Implications for producers

The interviews suggest that export performance improves when producers treat compliance not as an afterthought but as part of everyday practice. Where documents, label wording, and traceability are handled with care, shipments move with fewer frictions and relationships with import partners are easier to maintain. In tender-driven settings this operational discipline is not optional. It is the practical face of legitimacy, and it determines eligibility as much as the wine itself (Scott, 2014; Systembolaget, 2024).

How producers speak about their markets also matters. In contexts where buyers expect eco-credentials, the certification can lead the conversation and reduce search costs for distant partners. In other places it works better as supporting evidence that sits inside a broader account of site, style, and producer identity. This context sensitivity matches what we know about sustainability cues in wine, where willingness-to-pay effects are positive but not uniform across geographies and segments (Schäufele & Hamm, 2017). The practical implication is simple. Producers who can tell a short, clear story that links farming practice to taste and provenance, and who can adjust that story by market, are more likely to translate access into demand. In the language of capabilities, this is a communicative asset that supports value capture without replacing the underlying quality work in vineyard and cellar (Barney, 1991; Teece, 2007).

Importer selection follows the same logic. Partnerships are more resilient when portfolio fit, shared views on farming, and route-to-market coverage align. The interviews describe selection as gradual and deliberate, often with a preference for one partner per country to protect positioning. Such choices are not only commercial. They recognize that compliance routines and brand stewardship travel through people and organizations, and that the wrong fit can neutralize the very advantages certification was meant to signal.

6.4 Implications for Importers and Trade Partners

For import partners, the evidence points to a simple truth. The most valuable service is not a promise of volume. It is the ability to make a complex system legible and to carry a producer's story to the right accounts. In the United States this includes fluency in the three-tier structure and a clear view of where responsibility sits for education, pricing discipline, and compliance steps across the chain (Wine Australia, n.d.). In monopoly markets it includes familiarity with tender calendars, wording requirements, and traceability expectations that reach the bottle level (Systembolaget, 2024).

Producers in this study valued partners who reduce uncertainty for everyone involved. That can mean anticipating documentation issues before they arise, giving candid feedback on positioning, or organizing tastings that match the listening habits of local buyers. It can also mean discretion when the term "biodynamic" invites scrutiny and a lighter touch is more effective. Where these traits are present, certification works as intended. It secures access and helps the first conversation. Where they are absent, the badge opens a door that no one walks through.

6.5 Policy Implications

The institutional environment shapes export outcomes long before a bottle reaches a shelf. The interviews describe rules that are clear in intent but often heavy in process which could, with modest changes, be lowered without softening standards. Digital portals that consolidate forms, stable guidance on acceptable wording, and transparent expectations for traceability would help producers meet their obligations with less trial and error. These adjustments would support the stated goals of Scandinavian procurement, where sustainability and traceability are public priorities, and would reduce the administrative cost that producers repeatedly report (Systembolaget, 2024).

At a more general level, clarity helps signals work. When terms are applied consistently across agencies and over time, buyers and sellers can rely on a shared vocabulary. Certification then functions as both a gate and a cue: It defines eligibility where rules require it and it informs selection where discretion remains. The result is a system where environmental practice is visible, verifiable, and less costly to communicate across borders.

6.6 Robustness and Validity

The analysis triangulates evidence across an association interview and three producer interviews, observes strong convergence on core themes, and maintains reliability through the codebook and cross-case matrices. Quotes are time-stamped, and theme labels are standardized in English to preserve traceability from data to interpretation. While the sample is small, the pattern repetition is high and fits other evidence about market structures and sustainability expectations, including official materials on monopoly procurement and US distribution rules.

6.7 Limitations

This study is narrow by design as it focuses on Austrian producers who hold biodynamic certifications. The lens is therefore producer-side. Importers, buyers in monopoly systems, and consumers were not interviewed in this phase. Their perspectives are present only to the extent that producers describe them. The findings should be read as a grounded view from the supply side rather than a full market equilibrium.

The evidence base is qualitative and small. Interviews were conducted with one association representative and a small number of wineries. Although patterns recur across cases and are supported by a transparent codebook and cross-case matrices, the sample does not allow statistical generalization. The contribution is analytical generalization: it gives mechanisms that appear plausible beyond the cases, but it does not estimate effect sizes.

The temporal context also matters. Regulations, tender criteria, and label wording guidance evolve. A result that holds under one procurement cycle or one market advisory can shift in the next. The patterns identified here, certification as access, advantage as capability plus channel, are likely to remain relevant, but their relative weight can move with policy and with trade practice.

Finally, pricing and performance are treated qualitatively. The interviews speak to how price is formed, not to how much it changes. The study does not link certification status to volumes, margins, or tender win rates. Those questions require either a mixed-methods design or access to transactional data that were beyond the scope of this work.

Taken together, these boundaries frame how the results should be used. This study clarifies mechanisms and their conditions, shows where certification acts as a gate and where it works as a cue, and documents the capabilities that help producers convert access into durable relationships. It does not claim universal reach but offers a map that is accurate at the level of pattern and careful about the limits of its scale.

7. Conclusion

This thesis examined how wine certifications influence the export trajectories of Austrian producers who farm biodynamically. It asked four questions about access, regulation, brand and price formation, and export channels. The empirical work combined semi-structured interviews with an association representative and multiple wineries, analyzed through a Gioia-style coding process and structured by four interpretive lenses: Legitimacy, Signal, Resource, and Channels. The goal was not to estimate effect sizes but to clarify mechanisms and their boundaries across markets with distinct institutional designs.

7.1 Answers to the research questions

RQ1. Certification and export success.

Certification supports export success primarily by improving access and first contact. In receptive contexts, especially the Scandinavian monopolies and selected United States segments, eco-logos reduce uncertainty for distant buyers and help secure meetings and listings. Outside those contexts, the logo is a useful cue but not a decisive lever. Sales growth depends on portfolio fit and partner execution.

RQ2. Regulatory challenges and market access.

Compliance determines eligibility. Producers navigate destination-specific wording rules on labels and invoices, documentary requirements, and traceability that can reach the bottle level. These tasks are part of legitimacy work rather than marginal bureaucracy. When handled with discipline, they prevent delays and protect credibility. When neglected, they create friction that no amount of marketing can offset.

RQ3. Brand identity, pricing, and positioning.

Price formation rests on the producer–terroir–style package and on clear, credible communication. Certification fits the brand story as supporting evidence that signals process quality. It does not, by itself, create a premium. Where reputation, site quality, and narrative skill are strong, the badge travels further and helps the producer reach audiences that value environmental practice. Where these capabilities are thin, the badge has limited effect on price.

RQ4. Export modes and the role of importers.

Exporting is importer-led across markets, with national architectures shaping the route to market. In the United States, a general importer works within the three-tier structure. In Scandinavia, producers typically appoint one importer per country and follow monopoly procedures. The interviews converge on a practical bundle that defines a strong importer: compliance literacy, portfolio and values fit, route-to-market coverage, brand stewardship, and operational reliability. Certification can help identify eligible partners. Performance depends on these capabilities.

7.3 Contributions to current research

The study contributes in three ways.

It reframes certification in specific geographies as a license to operate, not only a marketing attribute. This clarifies why documents, wording, and traceability belong in the explanation of export outcomes.

It specifies signaling depending on the context as well. The same seal reads as a strong cue in one market and a weak cue in another, depending on public tender rules and local schemas and separates access from advantage. Certification opens doors, advantage arises when producers combine underlying quality and identity with narrative skill and with import partners who can steward the brand through the chosen channels.

7.4 Practical implications

For producers, the findings suggest treating compliance as daily practice, not an afterthought. A short, market-sensitive story that links farming to taste helps convert access into demand. Importer selection deserves explicit criteria that include documentation fluency, portfolio fit, coverage, stewardship, and reliability. Pricing should be anchored in reputation, site, and style, with certification used to support the tier rather than to set it.

For import partners, value comes from making complex systems legible and from carrying credible stories to the right accounts. Clear guidance on documents and wording, thoughtful education of the trade, and protection of price integrity are the behaviors that producers in this study associated with durable growth.

For policy actors, modest process improvements would lower friction without weakening standards. Digital portals that consolidate forms, stable and plain-language wording guidance, and proportionate traceability expectations would support environmental goals while freeing producer time for market work.

7.5 Limitations and scope for inference

The study is Austrian and producer-side in which buyer, importer, and consumer perspectives are not directly sampled and therefore the evidence is qualitative and small, which supports analytical rather than statistical generalization. Quotations were not translated to fully preserve meaning. Regulations and tender criteria evolve, so specific procedural details can shift. In sum, these boundaries do not undermine the central mechanisms identified here, yet they mark the limits of the claims.

7.6 Directions for future research

Three paths appear most promising:

1. Importer capability tests: Research could include importer interviews to validate the five-part capability bundle and to compare long-lasting relationships with those that stall.
2. Market design comparisons: Future studies should also aim to compare monopoly markets with private retail markets to estimate how much certification functions as a rule versus a signal.
3. Link to outcomes at scale: Lastly, other studies could aim to combine certification status with observable outcomes such as tender wins, shelf prices, and on-trade placements to gauge the size of indirect effects through access and search cost reduction.

7.7 Closing reflection

Eco-certification has become part of how Austrian wine travels. It secures legitimacy where systems demand it, and it shortens the distance between unknown producer and interested buyer. What happens after the first meeting depends on craft, identity, and the quality of the importer relationship. The strongest export outcomes occur when these pieces are aligned. In that sense, certification does not carry a winery abroad on its own, but it gives the winery a fair start in places where credibility is earned before it is tasted.

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Appendices

Appendix A: Interview Guide (German)

1. Wie würden Sie Ihren Betrieb heute kurz beschreiben? (Fläche/ha, wichtigste Sorten, Jahresproduktion, Exportanteil in %)

2. Welche Zertifizierungen nutzen Sie aktuell (falls zutreffend: EU Bio / Bio Austria, Demeter, respekt-BIODYN, Sustainable Austria)Seit wann?

3. Welche drei Auslandsmärkte sind für Sie derzeit am wichtigsten?

4. Seit wann exportieren Sie, und wie hat sich das über die Jahre entwickelt?

5. Inwiefern hat Ihre/eine Zertifizierung Ihren Export beeinflusst?

6. In welchen Ländern öffnet das Siegel spürbar Türen und wo kaum?

7. Gab es Fälle, in denen die Zertifizierung eher hinderlich war oder keine Rolle spielte?

8. Welche Export Formalitäten sind für Sie aktuell die größten Hürden?

9. Welche Unterstützung nutzen Sie (Verband, ÖWM, Spediteur, Berater)? Was hat am meisten geholfen?

10.. Wie integrieren Sie die Zertifizierung in Ihre Marken Story im Ausland?

11. Hat die Zertifizierung Ihre Preissetzung/Platzierung im Ausland beeinflusst?

12. Hat sich Ihr Zielpublikum oder die Ansprache im Handel verändert, seit Sie zertifiziert sind?

13. Über welche Kanäle verkaufen Sie aktuell in Ihre Top Märkte?

14. Inwiefern beeinflusst die Zertifizierung die Kanalwahl?

15. Gab es Kanalwechsel in den letzten Jahren? Was war der Auslöser?

16. Wenn Sie eine Sache in Zertifizierung oder Importrecht ändern könnten, was wäre es?

17. Welchen Rat geben Sie einer kleineren Kellerei, die jetzt in Zertifizierung und Export starten will?

18. Möchten Sie noch etwas ergänzen, das ich nicht gefragt habe?

Appendix B: Cross-Case Displays

B1: Evidence Matrix

This matrix documents the number of short, quotable excerpts available per theme and case. It was used to assess evidentiary depth and to support the selection of illustrative quotations for the findings chapter.

Anzahl von Example quote (short)	**Spaltenbeschriftungen**				
Zeilenbeschriftungen	**VERB-PR**	**WZ1**	**WZ2**	**WZ3**	**Gesamtergebnis**
Administrative burden		1	2		3
Alignment of personal and business values					
Awareness comparison between respekt and Demeter					
Brand management and narrative use			1	1	2
Certification trajectory and decisions					
Channel strategy		2	1	1	4
Community learning and knowledge exchange		1			1
Competences and responsibilities (compliance roles)					
Competitive pressure					
Core export markets					
Demeter as biodynamic reference standard					
Direct effects of certification	1	3		1	5
Entry requirements	1		1		2
Export compliance		1	3		4
Export intensity					
External quality assurance					
Gatekeeping and admission processes	3				3
Geographic signal strength and acceptance			1		1
High certification quality bar					
Label architecture and double certification	1				1
Market communication style	1				1
Market entry and growth paths					
Market outlook					
New certification decision					
Organic certification as baseline requirement					
Politics and interest constellations					
Price formation and value capture			1	2	3
Product and producer attributes as primary value drivers			1	1	2
Regulatory change and market effect					
Scope of respekt and Demeter					
Social responsibility as certification motive					
Target audience and segmentation			1	1	2
Terminology and labeling law			1	3	4
Traceability obligations				1	1
Trade policy and duties				1	1
Winery background information					
Gesamtergebnis	**7**	**8**	**13**	**12**	**40**

B2: Coverage Matrix

This matrix indicates whether a theme appears in each case at least once. It was used to assess cross-case pattern presence and to distinguish shared patterns from single-case observations.

Summe von Coverage_Flag	**Spaltenbeschriftungen**				
Zeilenbeschriftungen	**VERB-PR**	**WZ1**	**WZ2**	**WZ3**	**Gesamtergebnis**
Administrative burden	1	1	4		6
Alignment of personal and business values	2				2
Awareness comparison between respekt and Demeter				1	1
Brand management and narrative use	1	3	1	5	10
Certification trajectory and decisions	1				1
Channel strategy	2	4	4	2	12
Community learning and knowledge exchange		1			1
Competences and responsibilities (compliance roles)	2				2
Competitive pressure			1		1
Core export markets		1	3	2	6
Demeter as biodynamic reference standard			1		1
Direct effects of certification	1	5		2	8
Entry requirements	1		2		3
Export compliance	1	2	3		6
Export intensity		1	1	1	3
External quality assurance	2				2
Gatekeeping and admission processes	6	1			7
Geographic signal strength and acceptance			1		1
High certification quality bar	3				3
Label architecture and double certification	5				5
Market communication style	2				2
Market entry and growth paths		3		1	4
Market outlook		1			1
New certification decision			1		1
Organic certification as baseline requirement			2		2
Politics and interest constellations	1				1
Price formation and value capture			3	4	7
Product and producer attributes as primary value drivers			1	2	3
Regulatory change and market effect	1	1			2
Scope of respekt and Demeter	2			1	3
Social responsibility as certification motive			1		1
Target audience and segmentation			2	1	3
Terminology and labeling law	4		1	3	8
Traceability obligations			1	1	2
Trade policy and duties				2	2
Winery background information		4	6	6	16
Gesamtergebnis	**38**	**28**	**39**	**34**	**139**