



WMC Member Research Sharing Protocol

Welcome to Wine Market Council (WMC)! We are very pleased to have your organization as a member. As a non-profit organization supported by members, WMC has a *Member Research Sharing Protocol* to ensure that research data funded by members is not distributed outside of WMC and member organizations. This document explains how the *Member Research Sharing Protocol* works.

We ask that no WMC research materials, including reports, slide decks, videos of presentations, data files, or other materials be distributed outside of your organization without written permission from the WMC president. If you need to include several WMC slides or graphs in a presentation or report for an external conference or meeting, it is permissible to include 1 to 3 slides/graphs with ***permission from the WMC president***, - insuring that each slide/graph includes the WMC logo.

Wine Market Council asks that you ***designate one person within each member organization*** to manage the login credentials. This allows for better control of new research in case people leave their employment. We recommend having one person download the research and store it on a protected internal system (with firewall and/or password protection) so that your colleagues can access the documents rather than giving out the credentials. It is the primary organizational designee who is responsible to ensure that data once downloaded is not shared outside of your organization. Distribution of data outside of membership is a direct violation of your member terms and conditions and can result in expulsion from WMC for failure to safeguard.

Please note that high-level data from studies will be shared on occasion in press releases, articles, at conferences, and other venues for marketing and recruiting purposes, and/or media relations.

Prohibition on Commercialization of Data, Reports and Slides AND Use of Public AI Platforms

It is prohibited for members to use WMC data, reports, recordings or slide presentations for the creation of research or analytical products or services that are resold by the member or another entity. This includes: (a) resale of the reports, presentations or data; (b) reproduction of portions of the reports, presentations or data within another report or presentation for which money or items of value are received without the explicit permission of WMC; (c) usage of the data in the development of software, applications, or algorithms intended for external sale or commercial service delivery.

It is prohibited for members to upload WMC data, reports, recordings or slide presentations to a public AI (Artificial Intelligence) platform for analysis. Examples include the free and public versions of ChatGPT, Gemini, Claude, and others. However, members can upload WMC data, reports or slide presentations to a private, company-owned AI platform that is safeguarded by a firewall.

Examples of prohibition (c) include but are not limited to:

- **Algorithmic Training:** Using confidential datasets to train, fine-tune, or program machine learning models, AI systems, or software logic that will be sold to third parties.
- **Commercial Service Leveraging:** use of WMC data to build "Data-as-a-Service" (DaaS) or "Software-as-a-Service" (SaaS) offerings provided to external clients.
- **External Tool Input:** Inputting confidential data into external generative AI tools or "low-code" platforms where the data may be used to train the provider's models or become part of their public library.

Special Provisions for Trade Associations and Universities

Given that trade associations have both employees and members, and universities have both employees and students, it is important that WMC data, reports, recordings, and slide presentations **only be shared with employees, and not with trade association members or university students.**

One Employee – as with single organization members, trade associations and universities should designate one employee to manage the login credentials and any research data downloads (reports, slide decks, webinar recordings, data files). This allows for better control of new research in case people leave the employment of the Trade Association/University. That one employee may download the research and store it on a protected internal system with firewall/password protection that fellow employees can access. The data should NOT be shared or distributed to Trade Association Members or University Students.

However, there are several special provisions that allow for some educational sharing in limited quantities:

- 1) **REPORTS/PUBLISHED ARTICLES:** You can reference WMC studies in published reports or articles. For example: "According to Wine Market Council's study (20xxx) on XYZ, etc.", and can include 1 to 3 charts/graphs/slides.
- 2) **PRESENTATIONS:** You can include 1 to 3 graphs/charts/slides from WMC studies in your presentations at conferences, in classes, or trade association meetings - making sure to cite WMC as the source on each slide.
- 3) **FIREWALL:** Make sure that all data is protected within your website where only your Trade Association or University employees can access it, requiring a user id and password.
- 4) **WEBINAR RECAPS:** Members can request that all or portions of WMC webinars be available for sharing with trade association members and university students. Please contact the WMC president to schedule this.

What is not allowed is:

- Downloading and sharing complete WMC reports/slides/recordings with your members/students.
- Downloading and sharing more than 3 charts/graphs for your presentations, reports, or other purposes
- Sharing your logon ID with others.

Please note, that as a non-profit, Wine Market Council research is powered by membership dues. Therefore if you have some trade association members who want more data, please ask them to contact Wine Market Council. Thank you for being a member!