

National
Aquaculture
Council



FINAL REPORT:

Developing and Implementing a Business Model for Marketing and Branding Australian Seafood

January 2006

Project administered by the National Aquaculture Council



Australian Government

Fisheries Research and
Development Corporation

FRDC Project 2005/233

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**Developing and Implementing a
Business Model for Marketing and
Branding Australian Seafood**

FINAL REPORT

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Principal Investigator: Mr John Jenkin

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1. NON-TECHNICAL SUMMARY

FRDC Project 2005/233	Developing and Implementing a Business Model for Marketing and Branding Australian Seafood
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Objectives:

1. To develop a business model that will meet the marketing and promotion needs for the Australian seafood industry
2. Develop a strategy that will successfully roll out the proposed business model to obtain industry support and ultimate financing.

Outcomes Achieved:

The work conducted within this project has lead to the creation of a business model (as well as a set of operational rules), adopted by industry, to create an entity that is responsible for positioning Australian premium seafood domestically and internationally.

An entity, “Seafood Experience Australia”, has being established with the responsibility for facilitating the following outcomes:

- Improved profitability for the Australian seafood industry
- Improved unification of the Australian seafood industry.
- Premium positioning of Australian seafood.

Improved profitability for the Australian seafood industry

The market research and positioning strategy resulting from the Aquaculture Industry Action Agenda was recognised as an excellent basis for development of a promotional plan to establish Australian seafood as a premium product in the minds of consumers. The anticipated results from implementation of the strategy were the ability of participants in the Australian seafood supply chain to increase profitability. These supply chain participants requested information along the lines of a prospectus to ascertain their return on investment for participating in the promotion campaign. As such, the National Aquaculture Council instigated this project, the results of which were:

- A business model for an appropriate entity, guided by industry, to carry out the work required
- An establishment strategy, outlining the necessary steps to create the entity and obtain membership to execute the positing strategy
- A constitution for the company developed and guided by industry
- An interim Board for the entity responsible for company registration and refinement and implementation of the positioning strategy.

The constitution ensuing from the project was signed by an interim Board which has progressed work on registration of the company and implementation of the positioning strategy.

Improved unification of the Australian seafood industry

Staff and Members of the National Aquaculture Council (NAC) worked with representatives from the Australian Seafood Industry Council (ASIC) and Seafood Enterprise Alliance (SEA; a group set up by the National Food Industry Strategy [NFIS]) on a leadership group to guide the project. Formation of the Leadership Group, Chaired by Dr Patrick Hone of the FRDC, to guide the project was a major step forward in unification. The Leadership Group represented the interests of the supply chain through membership on the three organisations. The Leadership group was assisted by a Management Group, support staff from within NAC and NFIS and consulted widely with the members of NAC and ASIC as well as a reference group comprising of a wide variety of stakeholders. Membership of these various Groups is appended to the report (see Appendix A).

Premium positioning of Australian seafood

The primary goal of this project was to put the necessary steps in place to conduct a concerted long-term campaign to position Australian seafood as a premium product. Through the consultation conducted through development of the positioning plan, many issues within industry were identified that required addressing before a successful campaign can be implemented. Supply Chain integration, consistency and coordination of communications within the industry, application of standards for product and supply chain and importantly, the financial ramification of undertaking the strategy were just some of the issues highlighted as areas to address inconsistencies within. Many opportunities, such as the soon to be announced seafood standard, provide industry with the means for addressing some of the key supply-chain issues. The monumental task of the company tasked with development and implementation of the strategy is to coordinate and obtain the support necessary to ensure the exercise is as successful as it has the potential to be.

Leading nutritionist, Dr Rosemary Stanton, extols the benefits of seafood at the launch of “Seafood Experience Australia” – the Australian seafood promotions corporation.



A major outcome from this project was the recognition of industry participants and the acknowledgement of those working to progress the work, of the need to ensure that a sound strategy is in place before committing to various activities. This is necessary in order to produce a concerted and coherent campaign to position seafood as a premium category in the market place. The challenge ahead is to keep up the momentum to progress the initiative which is set to increase profitability for the Australian seafood supply chain participants - from water to waiter and pond to plate.

2. ACKNOWLEDGEMENTS

The project would not have come to fruition without the tireless work of project manager, NAC CEO Mr Simon Bennison, NAC Chair and Principal Investigator Mr John Jenkin and NAC Communications Officer Alexandra Bagnara. With the support of Dr Patrick Hone as Independent Chair, and all members of the Leadership Group (Alex Kailis, Arthur Raptis, Bob Pennington, Grahame Turk, Joseph Pirrello, Mark Hancock, Peter Fraser, Ron Edwards, Stuart Richey, Tony Murray, Debra Ferguson) establishment of “Seafood Experience Australia” has occurred. The NAC is grateful to staff at Department of Agriculture, Fisheries and Forestry as well as at ASIC, NFIS and FRDC for helping in moving the project forward. The NAC is also grateful to the support of the former Minister for Fisheries, Forestry and Conservation, Senator Ian Macdonald for his support towards this project. The NAC also wishes to acknowledge Mark Barber and Alan Smart of ACIL Tasman for working to a tight timeframe and accommodating the wide range of industry views in developing documents for the new promotion body.

3. BACKGROUND

Majority of seafood supply chain stakeholders that have been involved in the development of a positioning strategy for Australian seafood have agreed that this project is a priority for the Australian seafood industry. Industry had requested that the NAC continue to facilitate the development and submission of an application to the FRDC to assist in the resourcing of a business model that would take the initiative forward. NAC has undertaken intensive dialogue within their organisational structures and the outcomes from this project are results from those decision-making processes.



The project intends to provide the structure for an entity which will position Australian seafood as a premium product in the minds of consumers.

The project has originated through the Aquaculture Industry Action Agenda (AIAA). The aquaculture industry and the committee driving the implementation of the AIAA agreed that the number one priority was developing a comprehensive marketing strategy and a means to implement it.

The Department of Agriculture, Fisheries and Forestry commissioned a consortium of firms to develop a premium positioning strategy for a number of Australian aquaculture products. Three independent, Australian-owned companies, Market Equity, Principals and Bellamy Hayden, successfully joined forces to win the project.

The key objective of the project was to create a world class positioning solution for Australian aquaculture products that:

1. Improves the profitability of Australian seafood businesses
2. Accelerates demand;
3. Supports a lasting price premium; and
4. Creates an enduring emotional advantage in domestic and international markets.

This project has also grown from projects within ASIC and the Seafood Enterprise Alliance.

Extending the campaign to the entire Australian Seafood Industry

Initial research from this project indicated that the scope of the project should be expanded to include the entire Australian Seafood industry. The main reasons being:

1. Consumers in general do not differentiate between capture and culture product;
2. It was far more practical to include the entire supply chain;
3. Many of those companies trading in cultured product also traded in capture products; and
4. The project provided an excellent opportunity to unify all sectors of the Australian seafood supply chain.

One of the most important aspects the market results highlighted was that the campaign is equally relevant to the capture sector as aquaculture. A generic seafood promotion campaign is much more likely to provide increased benefits to not only both these areas of the seafood industry but also to the post harvest section and consumers.

The NAC and the Australian Seafood Industry Council (ASIC) are worked in close collaboration on this project along side members from the Seafood Enterprise Alliance within the National Food Industry Strategy. The project recognises the outcomes from a meeting in Sydney in June 2005 that resolved to form an entity called “Seafood Experience Australia”. It is anticipated that this will provide the vehicle into which the outcomes from this project will be directed.

The business model developed took into account existing and proposed enterprise, regional and sector level activities to complement the promotional initiative. These initiatives will greatly benefit from the platform this programme will develop. Similar work has been done in other primary sectors such as meat and livestock.

It will be necessary to identify and leverage off the appropriate seafood standards that will maintain the integrity of the premium positioning.

The NAC is confident stakeholders will see the benefits of participating in the marketing, and positioning entity. There may be the possibility to achieve further government funding support, but the size of this support will depend very much on how much the industry values the new corporation through the funds it is prepared to invest. This level of support will be contingent on a sound commercial business case being presented to industry. The project has delivered the means to present this case to industry.

4. NEED

The industry is currently suffering extreme pressure on both the domestic and international markets. It is under pressure from the strength of the Australian dollar and the increased availability of cheap seafood imports from various Asian and developing countries.

The seafood industry is also coming under increased pressure from other available food commodities due to the concerted, well-funded, sophisticated marketing and promotions campaigns conducted by industries such as chicken, beef, lamb, etc. There was clearly a need to look at opportunities to better position Australian seafood.

It has been generally agreed by industry that the most effective strategy would be to position Australian seafood at the premium end of food products. It had generally been agreed that this can best be achieved through recommendations outlined in the consultancy reports. The company, "Seafood Experience Australia" supports the proposal in principle that has been put forward by the consultants but reserves the right to change the recommended programme. It will be up to those driving the SEA to determine the most appropriate strategy.

The SEA needs to focus on close liaison with the various sectors to develop standards that will apply and ensure its integrity is maintained. A key task the consultants undertook was to ensure the business model presented a justifiable case for industry to participate in the programme.

The administration of SEA will ultimately be responsible for the positioning of premium Australian seafood and will determine the most appropriate positioning strategy to adopt. It may decide to simply implement those strategies that are proposed by the consultants. The vehicle by which Australian seafood can be successfully marketed domestically and internationally will depend upon the business model, ensuring that has the wide support of industry and that it is extended appropriately.

This project also identified the most appropriate financing strategies that the successful business model should adopt. Other key aspects relating to corporate structure and administration were also addressed.

For the larger task ahead, wider involvement and a commitment to achieve the outcomes is needed. Some of the true visionaries in the industry and those with more extensive marketing experience have already indicated their willingness to participate. The challenge ahead is to keep up the momentum to progress the initiative which is set to increase profitability for the Australian seafood supply chain participants.

5. OBJECTIVES

The purpose of this project was to

1. Develop a business model that will meet the marketing and promotion needs for the Australian seafood industry
2. Develop a strategy that will successfully roll out the proposed business model to obtain industry support and ultimate financing.

6. METHODS

a. Development of the business model

In order to progress the business modeling and to ensure the wide range of issues identified by industry were considered, a set of Terms of Reference to be met by the consultant were developed. These were in part be shaped by on-going progress towards establishing an Australian Seafood Marketing and Promotion Corporation and through work of the Leadership Group for the Project.

The terms of reference are appended to this report (See Appendix B).

Only one business model was developed. Within this model the consultant listed a number of options for key areas such as membership and board structure, financing strategies and administration. A consultant was selected from a tender process. The model included strategies to finance the entity. The consultant was required to:

- define the entity, identify ownership options,
- provide keys aspects for consideration in the final corporate structure including the articles of association/constitution,
- what its main business focus will be,
- how it will generate revenue (options to finance the entity),
- membership and Board structure
- provide a process to ensure the most appropriate model is successfully taken up by industry.

The consultant was asked to evaluate other business models in the primary industry sectors for similar entities that could successfully be applied to the seafood industry. The consultant also reviewed the financing strategies that have been applied to these entities. The financing strategies are just one of a number of components that comprise the business model.

The model was developed with significant input from key industry stakeholders along the supply chain identified by the major companies and industry organisations. A list is appended to this application of key businesses involved (See Appendix A). These companies were also approached for participation in the initiative through membership of the entity.

The Leadership Group later assisted in developing a business case for the entity that was chosen. The group was responsible for setting the criteria as to which aspects of the model best match the needs of industry.

The model provided a number of options in the area of corporate structure, membership structure, financing strategies, licensing, shareholding, etc. The Leadership Group received advice from the consultants that it was the task of the entity to develop its own business plan. It will take some time for the entity to collect the necessary finance to develop and implement the strategies developed by the board of management.

The consultant was asked to assist NAC with the roll-out of the business model and ensure its successful adoption. This involved obtaining consensus from key stakeholders to support and fund the preferred model and make steps towards establishing the entity.

The working group liaised with the consultant to develop a transition plan to enable the entity management to implement the outcomes of the project.

7. RESULTS

a. *Establishing the Entity*

In August 2005, FRDC funded the project to create a business model to develop an entity for promoting Australian seafood. Leaders from across the seafood industry in Australia were brought together to steer the project. Members of the Leadership Group consist of representatives from ASIC, NAC and SEA and include:

- Patrick Hone, FRDC (independent chair)
- Alex Kailis, Managing Director, MG Kailis Group, WA
- Arthur Raptis, Operations Manager, A Raptis and Sons, Qld
- Bob Pennington, Managing Director, Penningtons, SA
- Grahame Turk, Managing Director, Sydney Fish Market, NSW
- John Jenkin, Managing Director, Antipodean Projects, WA
- Joseph Pirrello, Managing Director, Ocean Fresh Fisheries, NSW
- Mark Hancock, Chief Executive Officer, Seafarm, NSW
- Peter Fraser, Managing Director, Lobster Australia, WA
- Ron Edwards, Chair, Seafood Enterprise Alliance, ACT
- Stuart Richey, Director, Richey Fishing Company, Tas
- Tony Murray, Managing Director, MTC, Qld
- Debra Ferguson, Managing Director, Ferguson Australia, SA.

The Leadership Group agreed to a set of Guidelines to provide direction throughout the project (See Appendix C).



“Seafood producers can be price makers, not price takers.”
Alex Kailis leads discussion on the promotional ideas that came out of Seafood Directions

Since the first meeting of the Leadership Group at Seafood Directions in September 2005, a consultant to develop a model for an entity to take carriage of the promotion initiative was appointed. The appointment was conducted through a rigorous assessment process with the consultants ACIL Tasman being awarded.

The consultancy helped resolve a number of important issues. These include deciding exactly what form this organisation should take - whether it became a corporation or some other business entity - its roles, membership and Board structure, how it was to be financed and its corporate administration.

The promotions entity was designed to complement and integrate with existing and future promotion efforts of individual companies as well as broader seafood and food sectors across Australia. The entity would also be responsible for developing linkages with programs at a regional, state and national level.

The project managers used the opportunity of developing the business model to create a constitution for the entity. The constitution was signed at the completion of the project and an interim Board appointed to administer the company "Seafood Experience Australia".

Both the constitution and the business model (three parts) are appended to this report (appendices D, E, F & G).

b. Development of the Strategy

At Seafood Directions in September 2005, industry was provided with the opportunity to create a "Vision" for the promotion of Australian seafood.

Alex Kailis, Managing Director of MG Kailis and member of the Leadership Group urged the conference's 300-plus participants to take ownership of a vision that would lead to the strategy. He said three steps were necessary:

- A united industry vision
- A strategy to deliver it
- Strategy execution and the dollars to fund it (a task of the promotion entity).

The industry has some excellent groundings on which to base a sound promotional effort. The 'vision' session was a successful exercise and will pave the way for strategy formulation. Elements of our vision as the Australian seafood industry (as workshopped at Seafood Directions 2005):

- Seafood as an icon dish in Australia - "Australia's National Dish"
- A premium quality Australian seafood identity and awareness as the seafood to be sought after.
- Fishers and producers as primary producer heroes; respected by the Australian community.
- Inclusive of all the industry, inclusive of the total seafood supply chain.
- Prosperous and vibrant with young people wanting to join.
- More than Australian seafood - The Australian seafood experience.
- All the industry pieces are coordinated.
- Well informed and educated consumers.
- Price makers, not price takers.

A suggested slogan was "If you like your seafood, respect your fishermen."

It was also recognised that implementation of the strategy was contingent on ensuring supply chain issues were addressed. Opportunities such as application of the Seafood Standards (to be enforced in May 2006) were identified as potential options for ensuring the positioning of "premium" product would have integrity. The task itself in obtaining consensus on the interpretation of premium was subject to much deliberation.

The Leadership Group received advice from the consultants that it was the task of the entity to develop its own business plan based on the strategy it chooses to adopt. It will take some time for the entity to collect the necessary finance to develop and implement the strategies developed by the board of management.

c. *Obtaining Industry Support*

The basic message that kept arising is that the Australian seafood industry must stand united if the promotion exercise is to be successful. Wide industry consultation was conducted throughout the project. The theme that the numerous communiqués that were issued reiterated was the need for continued support (refer to appendix H)

Cooperation is the backbone to the exercise. A unified approach from industry is necessary to ensure success of the SEA and the promotional work conducted by it. All Australian companies whose core business is the harvest, farming, catching, buying or selling of seafood from Australian waters will need to stay involved.

The promotion entity has been set up to be owned by its members. To make sure the entity operates in the spirit of cooperation, the representative structure of the Board was designed to reflect the broad range of industry supply chain participants that will be involved in promoting Australian seafood. The Leadership Group identified some of the qualities that the Board needed to have. These included knowledge and experience in:

- Promotion
- Industry (large and small – Capture and Aquaculture)
- Corporate Governance / Legal
- Business administration
- Finance
- Seafood Production and distribution
- Trade
- Economics and Policy

A reference group was established to ensure those who expressed interest in being involved in the project remain aware of developments and to provide input to strategy formulation. This initiative is designed to be inclusive of all Australian seafood industry participants. Membership for the interim Board was open to all seafood industry supply chain participants.

e. *Transition from the Leadership Group to “Seafood Experience Australia”*

The interim board of the new promotion body, chosen as an expertise based board by a selection panel, includes

- Bob Cox, CEO Southern Cross Marine Culture
- Chris Dockray, Chairman Tasmanian Salmonid Growers Association
- Ron Edwards Chairman Seafood Enterprise Alliance.
- Peter Fraser, Executive Director, Marine Produce Australia
- John Jenkin, Chairman National Aquaculture Council
- Grahame Turk, Managing Director Sydney Fish Market
- Mark Hancock, CEO Seafarm
- Tim Hess General Manager sales and logistics Petuna Seafoods,
- Tony Murray, Chairman Ocean Shrimp
- Debra Ferguson, International Marketing Director Ferguson Australia
- Alex Kailis CEO MG Kailis Group



Interim Board Members at the launch of “Seafood Experience Australia”: (R-L: Alex Kailis, Peter Fraser, Ron Edwards [Chair], Tony Murray, Bob Cox, John Jenkin, Tim Hess and Grahame Turk. Not pictured: Chris Dockray, Tim Hess, Debra Ferguson)

The interim board held its first meeting at the Sydney Fish Markets on December 19th following the meeting of the leadership group. The board chose Bob Cox as Company Secretary, Ron Edwards as Chair, adopted the draft constitution prepared by the consultants and reflecting the views of the leadership group with minor modifications and agreed to work on the results of this project as a means of evolving a strategy for the new board.

The interim board at this inaugural meeting decided to name the new promotion body “Seafood Experience Australia” reflecting the strong market research indicators that the “taste “experience is a key factor in the selection process for consumers.

The new organisation is designed to complement existing programmes and activities whilst being independent in determining the best approaches for whole of industry activities. It will also identify the most beneficial programs to link with. This "bigger picture" approach will help in guiding the future directions of marketing and promotion efforts. The entity would also be able to analyse the success of certain programs and provide opportunities for increasing success.

f. Communication and Extension

A website has been developed: www.seafoodpromotion.com

This website replaces the previous location for communiqués and background documentation. Along with the wide consultation provided electronically and through member debriefs, several opportunities to meet and debrief industry have been taken advantage of.

Stakeholders have been encouraged to seek further involvement in the project by requesting briefing meetings, presentations and discussions. These requests have been met where ever possible.

Communiqués and media releases have been issued to members of the Leadership, Management and Reference Groups for the project, as well as through media and broader stakeholder networks. These are appended to the final report (Appendix H).



Chair of the SEA interim Board, Ron Edwards, addresses the press at the launch of “Seafood Experience Australia”

A successful launch of the new body took place at the Sydney Fish Markets, attended by a large number of media representatives. The Chair of the entity, Ron Edwards, welcomed guests to speak with famed dietician Rosemary Stanton and renowned TV chef Luke Mangan. A great deal of work was put into the launch by Grahame Turk, Louise Nock and Amber Forrest-Bisley of the Sydney Fish Markets, Peter Horvat, Communications Officer of the FRDC and Alexandra Bagnara, Communications Officer at NAC. This effort has been continued in dealings with media and stakeholder networks.

8. BENEFITS

Significant benefits were derived from this project including;

1. Production of a workable business model that will ultimately provide the business plan for the entity responsible for positioning the Australian seafood industry.
2. Application of the model by industry towards developing a business plan.
3. The entity for implementation is resourced and owned by industry.

Expected results to be delivered to industry include:

- Improved profitability for the Australian seafood industry
- Improved unification of the Australian seafood industry.
- Premium positioning of Australian seafood.

Providing the business model produced is successfully implemented by the corporation, the result is an anticipated increase in profitability for all entrants of the Australian seafood supply chain.

9. FURTHER DEVELOPMENTS

Significant contributions have been made by many people and organisations to get “Seafood Experience Australia” to this point. Many companies have provided financial support to enable interim board members to attend the Sydney meeting along with NAC, NFIS and FRDC who provided similar support. “In kind” support has been considerable from the Sydney Fish Markets, the FRDC, NAC, ASIC, Fisheries WA and NFIS. Members of the leadership group and the interim board have freely contributed their time and energies to ensure this important transformation took place.

The interim board of SEA is keen to develop a network of supporters in agencies and industry bodies around Australia who are prepared to assist them in communication with the wider community, including industry members.

The SEA understands the need to ensure that a sound strategy is in place before committing to various activities, in order to produce a concerted and coherent campaign to position seafood as a premium category in the market place. The interim board is working on developing strategy and identifying activities of significance to industry.

The interim board is working to a six month timetable until the end of the 2005/06 financial year when there will be an annual general meeting of members to elect a board and address the strategic and business activities of the corporation.

10. CONCLUSION

The project has delivered an excellent foundation for the industry to seriously develop a structure and strategy that will unite the industry and provide real financial gains through coordinated professional integrated campaigns. The results were a business model that meets the marketing and promotion needs for the Australian seafood industry and a strategy that will successfully roll out the proposed business model to obtain industry support and ultimate financing.

This is a most exciting time for the Australian seafood industry. For the first time it has in place a promotion body that can advance our industry as a unified entity in the area of seafood promotion to consumers, industry, government and other important stakeholders.

APPENDICES

Appendix A Database: Members of the Leadership, Consultancy, Management and Reference Groups

Appendix B Terms of Reference for Development of the Business Modelling

Appendix C Leadership Group Guidelines

Appendix D Constitution for “Seafood Experience Australia”

Appendix E Business Model: Executive Summary

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Appendix H Project Communiques and Media Releases