



OIA20-0332

**3 September 2020**

John Luke  
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Dear John Luke

Thank you for your email of 29 June 2020, requesting '*full meeting minutes for each Primary Sector Council meeting since 28 May 2018*'. Your request has been considered under the Official Information Act 1982 (OIA).

All *Primary Sector Council - proceedings from meetings*, between 28 May 2018 and 19 November 2019, are released to you.

Some information is withheld pursuant to the below sections of the OIA. The Ministry for Primary Industries (MPI) is satisfied that in the circumstances of this case, the withholding of the information is not outweighed by other considerations which render it desirable in the public interest to make the information available.

- Section 9(2)(a) - *to protect the privacy of natural persons, including that of deceased natural persons*
- Section 9(2)(ba)(i) - *the withholding of the information is necessary to protect information which is subject to an obligation of confidence or which any person has been or could be compelled to provide under the authority of any enactment, where the making available of the information would be likely to prejudice the supply of similar information, or information from the same source, and it is in the public interest that such information should continue to be supplied*
- Section 9(2)(g)(i) - *to maintain the effective conduct of public affairs through the free and frank expression of opinions by or between or to Ministers of the Crown or members of an organisation or officers and employees of any department or organisation in the course of their duty*

There are no proceedings beyond November 2019. The Primary Sector Council (the Council) did not meet in December 2019. In February and March 2020, a sub-group of members held editorial workshops to prepare the Council's final report for public release. All other meetings in 2020 were sub-committee meetings to discuss the content of the report, and therefore do not fall within the scope of this request.

In April 2018, the Council was established as a Ministerial advisory committee made up of agribusiness leaders. It was set up to provide fresh thinking and independent strategic advice to the Government on issues confronting the primary sector, and to develop a vision to help New Zealand's agriculture, food and fibres sector navigate the unprecedented levels of change and opportunities it is facing. This is more important than ever, as New Zealand recovers from COVID-19.

The Council's vision and accompanying Te Taiao framework, developed in consultation with industry, will provide a springboard for transformative action. Ultimately, this vision will support the growth of the agriculture, food and fibres sector and play a vital role in our economic recovery, so we can build a stronger, better New Zealand.

Having fulfilled its purpose, and with its two-year term having come to an end, the Council no longer exists. Further information on the Council and the vision it developed, '*Fit for a Better World*', is publicly available at the following links.

- [www.mpi.govt.nz/about-us/our-structure/government-advisory-groups/primary-sector-council](http://www.mpi.govt.nz/about-us/our-structure/government-advisory-groups/primary-sector-council)
- [www.fitforabetterworld.org.nz](http://www.fitforabetterworld.org.nz)

I trust the information provided is of assistance. Should you have any concerns with this response, I would encourage you to raise these with the Ministry for Primary Industries at [Official.InformationAct@mpi.govt.nz](mailto:Official.InformationAct@mpi.govt.nz). Alternatively, you are advised of your right to also raise any concerns with the Office of the Ombudsman. Contact details are: Office of the Ombudsman, PO Box 10152, Wellington 6143 or at [info@ombudsman.parliament.nz](mailto:info@ombudsman.parliament.nz).

Yours sincerely



Sheryl Pinckney  
**Acting Director Primary Sector Futures Policy**

## Primary Sector Council – proceedings from meeting on 28 May 2018

### Key themes

#### Ministers' session

- Minister O'Connor shared his expectations on what the Council would achieve and provided an overview of where he believes the primary sector is at currently.
- In his overview, he and Minister Whaitiri noted that there is such a diverse range of actors and drivers within the primary sector requiring a coherent approach to leadership. Minister O'Connor spoke about New Zealand's brand and value orientation, and he questioned how the integrity and value of the sector could be improved. There is a wide spectrum of performers across the primary sector, some of who are leading the charge, and others who aren't performing adequately but remain to influence the New Zealand brand. He mentioned the potential of a change in mindset to lift performance.
- Both Ministers spoke about the importance of growing leadership, enhancing skills development and fostering an entrepreneurial environment in the primary sector. Minister O'Connor indicated that the sector should be able to recognise the opportunities presented from alternative proteins and other such disruptions. Both Ministers encouraged Members to think outside the box and to not be afraid to raise difficult issues.
- Minister O'Connor indicated that briefings would be available to the Council where required.

#### Complacency, vulnerability and urgency

- In general, the risk appetite is low in New Zealand, and New Zealand has been too comfortable and complacent, staying in the commodity end of the market.
- We have avoided needing to grapple with harder issues including optimal land use, sustainability of major sectors such as dairy, feasibility of continued reliance on migrant labour, and successful navigation of changing market dynamics and consumer expectations. There is potential for the pressure from market changes to be felt even before the full effect of the ETS kicks in.
- We now risk realising too late that we don't have the required capability to respond even as the challenges become acute (the boiled frog scenario).
- There are pockets of support for developing entrepreneurial capability and strong brand positioning (Te Hono for example). However, it is difficult bringing this capability to bear broadly on an industry so strongly focused on development of production efficiency without being cognisant of consumer markets.
- New Zealand's primary sector is vulnerable as a result, and has 3-5 years to act to turn this complacency around. The PSC needs to be a catalyst for change. On the one hand it can inspire and provide a path for the sector, and on the other hand it needs to consider holding actors to account for not changing, given that falling behind might go beyond free riding and actually undermine the vision.

## **Diversity and need for focus and coordination**

- A significant challenge is the diversity within and across sectors, with many independent actors and with variable performance and aspirations.
- Some major levers for driving development in the primary sector, such as the science and R&D investment systems, themselves seem quite fractured and uncoordinated, adding to the difficulty of supporting a focused vision.
- There is also a diversity of need, and there may be a need to better calibrate the support available to start-ups, to recognised high performers and to the main mass of the sector. This potentially applies not only to R&D investment support but also to knowledge transfer and regulatory settings that don't always keep up with innovation.
- There was some discussion of innovators as leaders and exemplars, and pitfalls such as black crab syndrome suggesting a need for some behavioural science understanding of why success sometimes drives resentment in others and how it can instead be used to drive inspiration.
- The PSC has the mandate to consider and advise on how best to coordinate action towards a focused vision in such a complex sector. The PSC may also consider the lessons from existing work, such as policy trade-offs and unintended consequences of the current policy focus on competition that may be identified in the DIRA review.
- There was discussion on "mobilising the tribe" and the need to get alignment among the groups that exist.

## **Investment, innovation, value creation and value capture**

- There is potential for business models, as well as products to be disruptive. There may be value in determining if success is attributable to a business model or to technology.
- There is the impression that start-ups and innovation don't drive the government's R&D strategies. Start-ups should be seen as a resource, young, innovative people should be encouraged to reach out and develop their ideas.
- If we protect the past, we won't get anywhere. We need to look to the future and how best we can capitalise on opportunities. Disruptors such as alternative protein should be viewed as an opportunity, not a threat. Their market presence is emerging and we need to figure out how they can fit into the current primary sector ecosystem.
- The general risk appetite for R&D is low and cooperatives are not investing in R&D. We have seen offshore capital fund our R&D. Unless New Zealand supports R&D, the technology is going to continue going offshore.

## Consumer focus

- The PSC work needs to remain consumer-focussed and mindful of consumer preferences, in particular how people regard New Zealand. We need to focus on what sets us apart now and what we want our legacy to be.
- New Zealand has traditionally operated with a lack of awareness for overseas markets. Despite this, New Zealand has excelled, “NZ is 100 times smaller and goes 100 times faster”. However, with the emergence of new market dynamics and increased competition, there needs to be leadership and coordination of the consumer-markets interface.
- Going forward, it’s important to consider our urban consumers in New Zealand as a proxy for the international consumer. What urban consumers relate to and resonate with can underpin our understanding of the international consumer preferences.
- Values such as social equity and environmental responsibility are powerful attributes to the New Zealand brand. If we can demonstrate leadership in those areas in the way our primary sector operates, we will be rewarded in the market place.
- There is work going on amongst industry and within MPI regarding assurance programmes and credence attributes. These programmes are not in the scope of PSC work but should be considered. Industry and/or MPI can be invited to brief the PSC at later stage.

## Environment

- Optimal land use is difficult to model, this is something the PSC may need to consider as part of a broad vision.
- New Zealand’s social licence has diminished in the past few years. Rebuilding this is a key objective for the primary sector.
- It is difficult to treat emissions as embodied in traded goods, as environmental effects and efforts to improve environmental performance are diffuse. However, efforts to positively impact the environment can bear reputational benefits for producers.
- There is a tension between central and local government to regulate and set standards. The PSC may want to consider how national direction could be implemented locally and how the process could be sped up.
- There are ongoing challenges around good data and measurement, making it difficult to benchmark and track progress.
- There are several farm plan initiatives and it is not clear how they all come together.
- The word “sustainability” needs to be defined, getting the definition right from the outset will bring clarity and will also allow the development of ways to measure it. To gain a deeper understanding of the word, there needs to be a mechanism that reflects trade-offs and intergenerational perspective. There may be scope to invite government officials to a PSC meeting to provide their view on what sustainability is.
- There may an opportunity to identify what are the major sticking points for producers in terms of improving environmental performance. For example, there are ‘fish hooks’

around counting soil carbon and using different definitions of trees. The PSC could work to resolve these issues and suggest ways to remove any such road blocks.

- Soil science and water are two major areas that would be useful and relevant for the PSC to understand more about. There could be an opportunity to invite the relevant Ministers to a future meeting.

### **Skills and capability**

- In the changing environment with new products, processes and technologies providing opportunities for New Zealand's primary sector, it's imperative that we are agile to adapt and respond. We need to ensure that we don't allow underdeveloped and insufficient workforce capability be our primary sector's downfall.
- There is an opportunity to enhance both industry and the government's investment in people. Inspiring greater commitment from both parties is a fundamental element to improving the overall capability of the primary sector.
- There needs to be engagement with business owners and operators to support them to move into the value-added space. In terms of skills, we need to better understand where the gaps lie, what impediments exist for businesses, and provide feedback on how we can support them.
- Action needs to be taken to ensure succession, the primary sector needs operators and owners on the ground, not just leaders.

### **PSC vision**

- Any vision statement needs to be succinct, aspirational, inclusive and reflective of the international reputation New Zealand trades on. It should be articulated with power and passion that is meaningful to stakeholders.
- Concepts that could feed into a vision include natural capital (land, water, animals and climate), human and cultural capital, social and intergenerational wellbeing, New Zealand's reputation and brand as a country, and focus for investment in the future.
- In creating a vision, the PSC need to consider urban and rural priorities. To achieve success, urban, rural and political thinking must align.
- The PSC should consider whether the word 'primary' limits thinking. A more explicit focus on food, fibre and consumers might help to focus the vision off-farm and signal the need for a stronger market orientation.
- The PSC has the mandate to be provocative and challenging. If the PSC is going to be provocative, there are some issues (e.g. GMOs) that it might be prepared to raise.
- There is a recognition that acting on some of the bigger ideas will likely take reallocation of resources and MPI would support a 2019 budget bid if the PSC is able to articulate the path of change that reallocated government resources would support.
- The implementation of any strategy needs to be measured. There may be scope to use the Living Standards Framework to measure implementation.

## Moving to action

- There was acknowledgement that the scale of the opportunities and challenges and the breadth of the PSC's mandate make its task daunting. There was discussion of where PSC should put its effort. Tackling everything in one go is risky and splitting into workstreams for specific topics might be a better approach.
- The PSC should avoid duplicating the work of other groups, including past efforts at sector visions that did not capture broad support or lead to action.
- The PSC will need a business model to translate from vision to implementation. It also needs to consider how it can use immediate practical actions to pave the way for a long-term, aspirational vision. The next 5-15 years need to be taken into consideration.
- The PSC should engage with the sectors, stimulate practical action quickly and feed ideas to ministers early rather than in a final report. There is an opportunity to advise the Minister on where to focus policies and use resources. The use of a roadmap or flight plan was suggested to give the sense of direction guiding action without details being locked in.
- There was the idea that the PSC could act like a start-up, by prototyping ideas and taking action early. The PSC's mindset should be based on inspiring creativity and leading the charge for change. This leadership will ensure businesses feel protected to branch out.
- The next meeting should focus on a design session on the business model questions (how to organise the work, how to engage the sectors and ministers and leverage resources such as Provincial Growth Fund, AGMARDT and MPI, how to prototype).

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## Decisions and actions

### Decisions made

- The quorum for the Council is 10 members.
- For documents uploaded to the file sharing system, Shared Workspace (SWS), a differentiation will be made between documents that are “FYI” or “Please read”.
- Bullet points are to be circulated after each meeting so Members are aware of what they can say publicly regarding meeting deliberations.
- The minutes will be a thematic overview of what was discussed and what the actions are. An effort will be made to get them circulated within a few days after the meeting.

### Actions from 28 May 2018

	Action	Person	To be completed by:
1	Send out instructions for how to access the SWS	Jess	2 June 2018
2	Upload Food & Fibre papers to SWS.	Jess	2 June 2018
3	Upload Team USA (subset of Te Hono) papers to SWS.	Jess	Subject to availability, John Brakenridge to follow-up.
4	Organise design workshop for next meeting.	Lain Stephanie Mark	If needed, Lain to decide.
5	Send out survey to identify best date for the next meeting.	Jess	9 June 2018

### Next meeting

#### Actions

- Create a clear purpose and define end goal, including timeframes.
- Agree key topics for key work streams, including priorities for prototypes.

#### Possible facilitators:

- Dr Mike Pratt or Clive Wilson

#### Other:

- A discipline for the PSC to follow – “what issues can we not ignore?”
- The possibility of online facilitation to align the purpose was raised as an alternative to facilitation in the next meeting.



## Primary Sector Council – proceedings from meeting on 23 July 2018

- The Primary Sector Council's (PSC) second meeting on 23 July 2018 was a design workshop facilitated by Scott Champion from Primary Purpose.
- The overall objective of the workshop was to identify and establish the workstreams that the PSC will undertake in its forward plan as well as establish a programme for how the PSC will work in the next 6 months.
- The group was split into two working groups which both completed a number of exercises and group discussions to draw out the workstreams.
- This document provides a thematic overview of the discussions and the workstreams that were identified. The facilitator has created another document containing the synthesised outputs from the exercises and discussions which will be used by the PSC and the MPI secretariat in determining the next steps.

### Key themes

#### Role definition

- There was a sentiment that the 'why' question regarding the PSC's establishment had not been fully answered in the first meeting, so this was explored briefly in one of the first exercises.
- The PSC's work will feed recommendations to the Minister which will in turn, inform MPI's work. It will identify the areas in which urgent attention is required, for example, the GMO-debate.
- At the same time, the advice to the government needs to work towards creating an environment to induce change for businesses. The approach recommended by the PSC needs to acknowledge businesses and communities.
- There is an opportunity for the PSC to coordinate with other groups across the primary sector. The term "coalition of the willing" was mentioned. There was an agreement that the PSC will act as a facilitator and a collaborator rather than a leader or owner.
- There was a discussion regarding what the PSC wants to aim for in its work. The consensus was that the group will focus mainly on its main workstreams while providing some bespoke advice to the Minister as requested.
- The question of the life of the PSC was raised. Given that the PSC has been appointed for two years, then it may be appropriate for the PSC to work with a longer-term, pan-sector group such as Te Hono on some initiatives. The PSC might build the starting framework, but will need additional support for the long-term implementation of its work. For example, in relation to any R&D workstreams, the PSC would be promoting a process rather than producing an end-product. Similarly, an initiative such as building an index to measure industry and enterprise performance of value-add and sustainable farming might be picked up by Te Hono, as an example.

## Creating the vision

- The group was eager to move promptly on the vision work as it will underpin the workstreams and the forward agenda. The next meeting will be another facilitated workshop in which the PSC will prototype the vision.
- The vision needs to balance a focus on the environment and on industry performance. There was consensus that time would be well spent achieving buy-in across the sector (both with businesses and industry groups).
- The vision needs to encompass the value proposition and the aspirations. A business's ability to deliver on the vision becomes its endorsement in the market. For this reason, the vision must also resonate with consumers.
- The PSC recognise the importance of existing work and the significance of existing visions in the primary sector, they will take these into account in the prototyping of its vision. But it was noted that the PSC is not intending to repeat or simply combine existing visions.
- After the next meeting, the PSC members want to be able to confidently endorse the vision in their circles. The PSC intends to test the prototype vision with industry over a 3-6 month time period to obtain industry and business feedback.

## Justification for the vision

- The story about the primary sector must be told effectively to get buy-in from industry and induce change at the business level.
- To strengthen the justification of the vision, the PSC discussed the feasibility of commissioning a situational analysis which would provide a factual account of the current scenario.
- The document would be a succinct, well-substantiated situational analysis with a view of sustainability and value-add, underpinned with factual evidence. This work is important to create alignment and a sense of urgency around the necessity and opportunity in repositioning New Zealand's food and fibre sector.
- Some options for undertaking this work that were suggested include contracting an investigative journalist or an academic. The idea that the PSC members would co-author the document was also discussed.

## Considering the broader context

- The aspiration for the primary sector must be considered in a broader context taking into account New Zealand's national aspiration. The vision for the food and fibre sector must form part of the national initiative and the interlinkages between the economic, social and environmental spheres.
- There was a specific discussion focussed on the clear association between tourism and food and fibre production, as they utilise the same resource - the land. The aspiration needs to factor in tourism and work toward reconnecting the urban and rural populations.

- Recognition was given to the generational element of the aspiration for the primary sector, involving people, land and water and the need to ensure future generations were factored into the thinking.

### **Enhancing capability**

- There was a discussion regarding the education system and how to enhance capability. The discussion suggested that one of the workstreams could be to characterise the capability required to get the primary sector to where it needs to be.
- The challenge of re-aligning CRI's activities with the identified sectors' needs was also raised and the importance of capturing secondary and tertiary education was also emphasised.

### **Using data to create change**

- There was the idea that an index could be introduced to the primary sector to track performance across the sector. The metrics or index could be done by sector from a sustainability and value-add perspective. This would enable measurement of performance and progress.
- s 9(2)(ba)(i), s 9(2)(g)(i) [REDACTED]
- There was a discussion focussed on gathering baseline data to benchmark where the sectors are currently, leading to the creation of a roadmap of where they aspire for the sectors to get to.
- This led to a discussion of the idea that businesses could sign up to an index where their metrics would be taken and they would be evaluated in relation to other businesses and defined goals. This system would definitely generate change and highlight good and bad performance.

### **Communications**

- There was a discussion around the public's perception of what the PSC will do and it was recognised that there is an opportunity for the PSC to engage with the public.
- The topic of how the PSC should communicate was raised and whether the PSC needs a website or other platform on which it can engage with industry and the public. This led to a discussion of how to be transparent and share the PSC's progress.

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## Workstream identification

- Underpinning the workstream exercises, there was the idea that a strong partnership needs to be built between government and businesses. This performance-oriented relationship will enable the co-creation of national capabilities around sustainable farming and value-add strategies which are crucial to the positioning of the New Zealand food and fibre sector for the future.
- The following points summarise the recurring themes for the workstreams:
  1. *Situational analysis*: produce a situational analysis to inform the rest of the PSC's work and Government policy more broadly.
    - There is a sense that the New Zealand primary sector is not where it needs to be with regard to either sustainability or value-add.
    - A situational analysis will create a common starting point and a strong fact base, which together are important to support both a sense of urgency and alignment across the sector.
    - Importantly, a well-written and concise situational analysis will provide a rationale for potentially strong policy advice and action that may be appropriate and necessary in some areas.
  2. *Vision creation*: prototype a vision for the New Zealand primary sector and to finalise this in consultation with sector groups.
    - It was suggested that this will be 'Aotearoa's Food and Fibre Vision Statement' as opposed to the 'Primary Sector Vision'.
    - The vision needs to balance a focus on environmental sustainability and on industry performance and incorporate a value-add perspective.
    - The vision will be prototyped on 18 August 2018 and a draft should be available to the Minister and the PSC shortly after this meeting for reference and consultation.
    - The vision statement will be supported by a set of implications to inform the discussion about future direction. These implications will support the industry engagement on the vision. Examples of implications might be a characterisation of the national capability required to get the sector to where it needs to be, or the idea that the food and fibre sector should position itself as world-leading in the sustainability space as opposed to fast-followers or laggards.
  3. *Shift from volume to value*: support the on-going work for the food and fibre industries to move from volume to value.
    - There is an opportunity to create an index of indicators which can be used to measure value-add and sustainability outcomes. There was the suggestion that this could be led by a pan-sector network (e.g. Te Hono) and that the initiative may support an annual awards event where businesses are awarded for their success in the growth, value add, and sustainability spaces.
    - Fundamental to this work will be a characterisation of what value-add means for each of the sector value chains and how it can be measured. This has the potential to feed

into a much more sophisticated dialogue about the national and enterprise level capability required to support the creation of premium value-chains.

4. *Thought leadership*: provide thought leadership across a range of strategic issues.
  - The PSC explored a piece of work around a range of strategic issues which would involve initiating difficult conversations. This would focus on the large issues that other groups have not explored (e.g. the GMO debate). There was also a discussion around how the PSC could understand and improve constraints to potential high-growth sectors.
5. *Taiao (environmental)*: contribute to the critical dialogue and policy work around sustainability.
  - There is the potential to characterise what sustainable farming looks like for the major sectors, i.e, what is the aspiration vs. where are we today?
  - There is an opportunity to contribute to the dialogue around the focus and investment required to ensure New Zealand is at the front of the curve regarding science and technology that supports sustainable farming e.g. shifting nitrate measurement from inputs to leaching, and genetic and vaccine approaches to reducing methane emission.
  - There is an opportunity to characterise how world-leading sustainable farming approaches can be a source of competitive advantage for New Zealand agriculture, for example:
    - Identifying high-value plant proteins suitable for farming in New Zealand;
    - Aligning incentives to support farmers to adopt a mix of trees, high-value protein, livestock feed and ruminant livestock optimised to the characteristics of their land;
    - Developing a deep understanding of how to farm ruminants in the most environmentally efficient way possible.
6. *Education, science and research capability*: provide advice around building the national capability required to position New Zealand food and fibre sectors as world leaders in the sustainable production of value-added food and fibre.
  - The capability gap and the actions to align the education, science and research systems need to be identified. There is scope to reset and re-align the current interface of education, R&D and CRIs with business and other government agencies. This work would involve characterising the national capability required to support sustainable value-added farming, learning from world leaders in this space, reviewing the science and education system and focussing on the next generation by understanding how to attract more talent to the New Zealand primary sector.
7. *Roadmap*: create a summary document encapsulating what is required to reposition New Zealand's food and fibre sectors for the future.
  - The creation of a roadmap would further support the delivery of the vision into the future and document the broad implications of the PSC's conclusions on value-add, environment and capability.



## Decisions and actions

### Decisions made

- The next meeting will be a facilitated workshop to prototype the vision. It will be facilitated by Scott Champion from Primary Purpose. The group are open to having the next meeting on a Saturday (18th or 25th of August) in order to optimise attendance.
- There may be another meeting in August to prioritise workstreams after they have been characterised by the Chairperson and meeting facilitator.
- The Dairy Industry Restructuring Act review team and the Interim Climate Change Committee Chair will come and speak to the PSC at one of its next meetings.

### Actions from 23 July 2018

	Action	Person	Completed by
1	Collate primary sector visions, produce a thematic summary and upload this to SWS	MPI	10 August 2018
2	Draft the Request for Proposal for the situational analysis and upload to SWS	Lain Jager	2 August 2018
3	Identify a selection of candidates from the MPI procurement panel for PSC support	MPI	3 August 2018
4	Determine if Google documents can be used to support the PSC work	MPI	3 August 2018
5	Draft talking points for members	Lain Jager	27 July 2018
6	Produce outputs from the workshop	Scott Champion	30 July 2018
7	Characterise workstreams	Lain Jager and Scott Champion	TBC
8	Lock in forward dates to December	MPI	25 July 2018
9	Confirm the application and protocols of OIA legislation in relation to the PSC	MPI	3 August 2018
10	Organise for DIRA team and Interim Climate Change Committee to attend next meeting	MPI	27 July 2018
11	Determine the feasibility of setting up PSC webpage	MPI	3 August 2018

## Primary Sector Council – proceedings from meeting on 18 August 2018

- The Primary Sector Council's (PSC) third meeting was held on 18 August 2018 and was facilitated by Scott Champion from Primary Purpose.
- The overall objectives of this meeting were:
  - i. to progress the PSC's work on developing its pan-sector vision, and
  - ii. to discuss the progression of one of the workstreams identified in meeting two, the situational analysis.
- Those in attendance were: Lain Jager (Chair), Tony Egan, Julia Jones, Mark Paine, John Rodwell, Steve Saunders, Puawai Wereta and Shanna Hickling.
- Those not present were: John Brakenridge, Stephanie Howard, Julian Raine, Neil Richardson, Steve Smith, Miriana Stephens, Nadine Tunley, Hayley Hoogendyk and Nigel Woodhead.
- Lain Jager informed the members that Shama Sukul Lee has resigned from the PSC due to other work commitments with her start-up company.
- Prior to the meeting, all members (whether attending or not) were asked to complete a number of tasks in preparation for the meeting, these included a ranking exercise of the possible elements of a vision and the creation of their own prototype vision. The outputs from these tasks were used to inform the meeting discussions.
- This document provides a thematic overview of the discussions that occurred.

### Key themes

#### Being courageous in working towards the aspiration

- There needs to be a discussion about the tensions between the PSC's aspiration of a sustainable food and fibre sector (the sector), and how to bring people across the value-chain along on the journey to achieving this aspiration. The PSC in its vision development and the government in its implementation, both need to be courageous to think about the possibility of potentially leaving behind some of the underperformers in the sector.
- The importance of the regions was highlighted, it was pointed out that they could hold the key to aspirations as there is an opportunity for regional-led initiatives to drive change. However it was also mentioned that the diversity of the regions makes it challenging to produce a single framework.
- In the global context, things are going to change drastically and there is a sense of fear amongst the sector, people want to change but do not know how to. There is an opportunity for leaders to lessen the amount of fear amongst the sector and there is potential to communicate small changes for people to make.



- Farmers should be provided with tools for change and offered choices. They need to be informed on what steps they can take to be more sustainable. There is an acceptance in the sector that making the change is not easy, but people are eager and want to know how and if they will be rewarded for it.
- The term 'sustainable' is not clearly defined or understood. There are people working towards becoming more 'sustainable', but they are not sure of when they will get there and how to know when they get there. Sustainability needs to be recognised as a journey and not a static state.
- There is potential to use regulations to influence change in the sector. The intervention of regulation can make a huge difference to the sector, a reference was made to the 2017 young calves regulations which have made a substantial change to the meat industry.
- It was recognised that the food and fibre sector is ready for a pan-sector vision, with other groups holding off on creating a vision while the PSC develops its vision. The vision is already subconsciously shared by many, however, it still needs to be articulated. It was suggested that the vision can act as the sector's North Star.

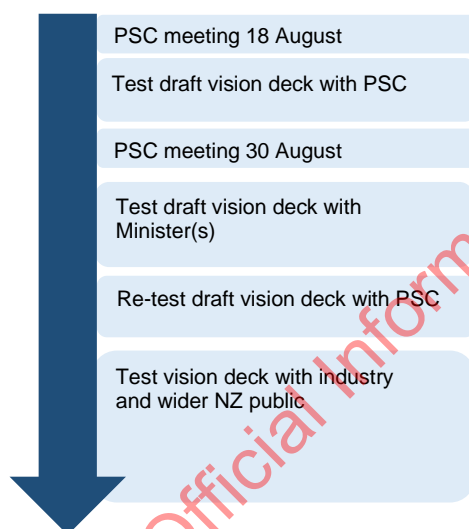
## **Progressing the vision development**

### *Achieving buy-in amongst the government and the food and fibre sector*

- There needs to be a common understanding of who the audience for the vision is. There was a discussion around if the vision is primarily for government or primarily aimed at the food and fibre sector participants.
- The PSC recognise the importance of testing its direction on the vision development with both sets of audiences in order to obtain agreement and encourage commitment from across the sector to all pursue the same path towards the vision.
- There was a discussion around how to 'institutionalise' the vision, there needs to be a politically agnostic conversation regarding the vision and the PSC recognise that it needs support from both sides of the House of Representatives.
- The PSC discussed its method for testing the vision with government and with the food and fibre sector, the creation of a 'vision deck' was proposed.

### *Creating and socialising the 'vision deck'*

- Following this meeting, the PSC is going to draft a 'vision deck' which will include the PSC's ideas for the vision and the main elements it believes the vision should incorporate. The overall intention is to socialise this collateral to gain qualitative input from the government and the food and fibre sector to inform the PSC's vision development.
- The PSC will first test its 'vision deck' with Minister O'Connor and other Ministers. It will then use the document to engage in conversation with food and fibre sector participants about the PSC's direction for the vision. The 'vision deck' will also be uploaded onto the PSC webpage for comment from the wider public. A proposed timeline of the 'vision deck' development and testing is below:



- There was the discussion that the contents of the 'vision deck' and the vision development could also be tested at an existing food and fibre conference or at a dedicated event where a number of stakeholders are in one room.

### *Elements to encompass in the vision and accompanying collateral*

- The PSC recognises that some elements of the vision need to be emphasised, the group was in agreement that environmental sustainability must underpin the vision. It was also highlighted that the PSC needs to think about what the vision means to consumers.
- Regarding the impact of sustainability claims, there are differences in perceptions that vary from market to market. For example, it was suggested that in the US, a sustainability claim reinforced the perception of health outcomes whereas in China, it has been reported to be associated with food safety. The PSC needs to be aware of these subtle differences in perception. There was a suggestion that the vision has more focus on the word "trust".
- When the vision has been fully-developed, the PSC will produce a second layer of accompanying collateral which indicates the enablers and constraints of achieving the vision. Enablers may include: a collaborative approach across the sector to ensure science is

connected, a promotion of farm and business succession, an aligned government strategy and enacting regulations of change. Constraints may include: a lack of cross-sector buy-in across the vision, a disengaged public and a one dimensional silo mentality of mixed visions.

### **Building on the situational analysis workstream**

- There was a discussion on one of workstreams identified in meeting two, the situational analysis.
- It was decided that the situational analysis would be a data-informed view of where the food and fibre sector is currently at. It may also provide a view on how to be sustainable while achieving growth.
- There are options for how to present the situational analysis. It could be one of the following:
  - i. a document describing the status quo only,
  - ii. a document describing the status quo and pointing in the direction of change based on a number of qualified assumptions,
  - iii. a document describing the status quo and a range of multiple futures.
- The PSC agreed to pursue option ii and carry out a further exploration of the scope of this document. Some suitable contributors were put forward, Paul Dalziel and Con Williams.

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## Decisions and actions

### Decisions made

- The PSC will be provided with an opportunity to update their biographies before they are uploaded to the PSC webpage.

### Actions from 18 August 2018

	Action	Person	Completed by
1	Explore the current situational analysis scope and determine availability of data and in-house capacity to complete work	MPI	TBC
2	Rework the current situational analysis scope	Lain Jager	TBC
3	Produce outputs from meeting	Scott Champion	TBC
4	Draft talking points for members	Lain Jager	24 August 2018
5	Draft summary of meeting for MPI website	MPI	24 August 2018
6	Draft 'vision deck'	Scott Champion, Lain Jager, MPI	30 August 2018
7	Publish Primary Sector Council webpage and update bios	MPI	23 August 2018
8	Compile list of stakeholders to test 'vision deck' with	MPI	24 August 2018

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## Primary Sector Council – proceedings from meeting on 30 August 2018

- The Primary Sector Council's (PSC) fourth meeting was held on 30 August 2018.
- The overall objectives of this meeting were:
  - i. discuss the draft Vision Deck to be used to test the pan-sector vision with the sector;
  - ii. discuss the workstreams identified in meeting two; thought leadership, volume to value, Taiao (environmental); and
  - iii. engage with the Interim Climate Change Committee and the Dairy Industry Restructuring Act (DIRA) review team to understand their work further and provide feedback.
- Those in attendance were: Lain Jager (Chair), Julia Jones, Mark Paine, John Rodwell, Shanna Hickling and Nigel Woodhead.
- Those not present were: John Brakenridge, Tony Egan, Stephanie Howard, Julian Raine, Neil Richardson, Steve Saunders, Steve Smith, Miriana Stephens, Nadine Tunley, Puawai Wereta and Hayley Hoogendyk.
- MPI officials in attendance: Ben Taylor and Jess Anderson (full day), Emma Taylor and Penny Nelson (part of).
- Prior to the meeting, all members (whether attending or not) were asked to review the draft Vision Deck and be prepared to provide feedback at the meeting.
- This document provides a thematic overview of the discussions that occurred.

### Key themes

#### General meeting attendance

- s 9(2)(ba)(i), s 9(2)(g)(i)
- 

#### Vision Deck feedback

- The discussion on the Vision Deck built on that from meeting three. The consensus of the meeting was that the Deck was not yet ready to be communicated and that the PSC should aim to release the Vision Pack and the situational analysis at the same time. This will add weight and context to the Vision Deck because the PSC can draw from the situational analysis to open the dialogue with an authoritative view of our starting point on some important dimensions.

- There was focused discussion about the three slides “*What might implementing the Vision Mean?*” under the headings of World Leading / Global, Prosperous / Value-Added, and Environmentally Sustainable. The consensus was that there was an opportunity to build power, focus, and clarity into this part of the presentation. This is important because being very clear about what the PSC thinks the implications or “*so what*” of the Vision means is what will make the discussion with the sector meaningful and different from previous high level discussions. Time would be scheduled at the next meeting to do this work.

### Situational Analysis progress

- Lain and the secretariat have engaged with Paul Dalziel and Caroline Saunders from AERU regarding the situational analysis. Paul and Caroline are currently preparing a proposal.
- In order to not unduly hold up engagement of the Vision Deck, the proposal will focus on what can be delivered in a 6-8 week timeframe.

### Guest speakers

#### *The Interim Climate Change Committee*

- The Chair of the Interim Climate Change Committee (ICCC), Dr David Prentice attended the meeting along with Pauline Marshall (Director of the secretariat) and Andy Reseigner (secretariat). They provided an informative presentation about the ICCC’s establishment, mandate and work programme.
- The ICCC is working towards identifying starting points for the policy agenda by producing a report for the Climate Change Commission before the end of its on-year term in April 2019.

#### *DIRA*

- Some of the DIRA review team, Annie Hindle-Daniels (Manager) and Matthew Steele (Senior Policy Analyst), spoke to the PSC about their work and the main themes that were arising from their engagement with stakeholders.
- They spoke about the five levers that the DIRA offers the dairy sector, the mandate of the review, the broader context, concerns amongst stakeholders and the policy options for MPI.
- The DIRA review team has spoken to a number of dairy processors and a workshop has been held by Minister O Connor. The main concerns that have been voiced include:
  - Environmental impact of the dairy sector;
  - The transparency in milk price setting;
  - The commercial impact of the DIRA levers; and
  - Whether the value-add aspect has been addressed.

- s 9(2)(ba)(i), s 9(2)(g)(i)

## Workstream discussion

- The group had a discussion about the other workstreams identified in meeting 2; thought leadership, volume to value, and Taiao (environmental), and how to progress these. The workstreams are further described in detail in the PSC Strategy Workshop 1 tracker document.

### *Thought leadership workstream:*

- There was consensus that the thought leadership workstream should be focussed on key strategic issues arising from the Vision and its implications and the group's workstreams particularly in the value-add and sustainability areas. The reason for this was that the PSC has limited time and resources available and a broad programme of work ahead of it.
- There was specific discussion about whether the PSC should consider the issue of GMO in New Zealand and agreement to schedule a discussion about this at a future meeting.
- Other areas in which thought leadership could be undertaken are:
  - Identifying of high-value crops
  - Technology and land-use change
  - Versatile soil use
  - Creating spatial land-mapping tools to support farms transition or diversify
  - Enhancing the grow function of MPI
- Time would be taken at a future PSC meetings to further discuss potential thought leadership topics.
- There was a suggestion from MPI that MPI/MfE could come to speak to the PSC about the work regarding versatile soils and land-use. MPI/MfE would benefit with testing the work with PSC.

### *Volume to value workstream:*

- One of the objectives of this workstream is to create a national dialogue about how well New Zealand is doing at migrating from volume to value. The discussion noted the difference between high-value formats (UHT milk, mozzarella cheese), and value-add (typically differentiated, branded consumer goods sold for a premium).
- The next steps proposed in the Tracker document were supported by the group and the Chair undertook to report back on progress at a later meeting.
- MPI indicated that there is an opportunity for MPI to work with the PSC and create a green paper with the Minister about the future of the primary sector. The green paper would embed how government and business work together and act as a bipartisan document to demonstrate that there is a common viewpoint of the sector. This would need to be done in February or March next year, with this paper, to enable a cross-party view of what the future looks like. The PSC are positive about the prospect of this.



- It was agreed that this workstream could be governed by the main PSC group and subgroup establishment was not necessary.

*Taiao workstream:*

- There was agreement that there is yet some work to be completed in defining how to progress this workstream.
- An emphasis was placed on measuring what good looks like, in addition to measurement, the PSC is aware that what good looks like also needs to be defined. There was a discussion about the importance of science to measure the appropriate parameters, for example nitrate leaching and consider variations such as catchment areas.
- Reference was made to people who have done substantial thinking and investment in this area, for example; Rick Pridmore from DairyNZ and regional council CEs James Palmer (Hawkes Bay), Bill Bayfield (Environment Canterbury) and Michael McCartney (Horizons Regional Council).
- There needs to be better information regarding optimal fertiliser use, it was mentioned that traditional fertilising techniques have been passed down from older generations and changes have not been made for changing conditions. Related to this, any advice for meeting environmental requirements needs to be practical for farmers. Millions of dollars has already been invested in fertiliser use, MPI officials indicated that it would be interesting to know how much has been spent in levy organisations regarding fertiliser use and what they have found.
- There was a lengthy discussion concerning the carrot versus the stick approach to improving environmental outcomes. The question was raised about how to engage with those operators who don't want to change and what, if any, is a big enough carrot to incentivise these farmers? Regarding the public's view, the carrot is bound to achieve a far better reaction from society in general. Most members favoured the idea of a pull up from the top, by way of reward, instead of a push up from the bottom, by way of regulation.
- There was a discussion around how to fit the reward around the regulatory framework. An example was provided of work in Southland related to effluent - there was a particular level that everyone was required to meet, but if you had appropriate on-farm tools that were best practice, you would be rewarded by obtaining resource consent for 10 years as opposed to the usual five years.
- There was general agreement that specific members who are well-qualified and passionate about this area would design and lead this workstream. This will be discussed further in the next meeting.

## Decisions and actions

### Decisions made

- The Vision Deck will not be released until the situational analysis is complete.
- Set timeframes and goalposts for the PSC.

### Actions from 30 August 2018

	Action	Person	Completed by
1	Meet with Paul Dalziel and Caroline Saunders from AERU	MPI and Lain Jager	7 September 2018
2	Review the vision pack (in particular the 'What might implementing the Vision mean' slides).	All PSC	19 September 2018
3	Draft summary of meeting for MPI website	MPI	7 September 2018

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## Primary Sector Council – proceedings from meeting on 19 September 2018

- The Primary Sector Council's (PSC) fifth meeting was held on 19 September 2018 at Lincoln University.
- The overall objectives of this meeting were:
  - i. discuss the Vision implications in further detail to inform a second drafting of the Vision Deck, Scott Champion from Primary Purpose facilitated these sessions; and
  - ii. adopt a common view regarding the PSC's approach to the future capability and investment workstream following a session with Tim Morris from Coriolis.
- Those in attendance were: Lain Jager (Chair), John Brakenridge, Julia Jones, Mark Paine, John Rodwell, Steve Smith and Nigel Woodhead.
- Those not present were: Tony Egan, Stephanie Howard, Julian Raine, Neil Richardson, Steve Saunders, Miriana Stephens, Nadine Tunley, Puawai Wereta, Shanna Hickling and Hayley Hoogendyk.
- MPI officials in attendance: Ben Taylor and Jess Anderson.
- This document provides a thematic overview of the discussions that occurred.

### Key themes

#### Vision

- The aim of the vision implication sessions was to ensure that the fundamental building blocks underpinning the draft vision are present and that the vision implication statements are sufficient in providing clear, concrete recommendations.

#### Draft vision

- There was a discussion of what the PSC liked and disliked about the current draft vision. In general, aspects of the vision that were favoured were:
  - The length, it isn't too long;
  - The simple link between Aotearoa and goodness;
  - The emotive aspect, love and care;
  - The human element, nutrition, health and wellness; and
  - The words "Innovative, inclusive and resilient" which feel like guiding principles.
- Some of the aspects that were questioned were:
  - The year 2077, it didn't resonate as it was not clear why this year was selected; and
  - The lack of a mention of quality experience for the most discerning customers.
- Further elements to incorporate into the vision were mentioned such as:
  - an emotive reflection, "NZ is an experience which is good for you whether you are here or there";

- social licence; and
  - ensuring basic needs such as taste and look are satisfied as well as sustainability.
- There was the idea that in the vision, NZ could be personified to further generate a connection to people.
  - There was a discussion around the potential collateral that could be produced to communicate the vision. Creative pieces to communicate the vision were discussed and a question of how to visualise the vision was raised. There was the idea that a video of NZ as a woman who cares for the world could be created.
  - It was reiterated that the PSC wants to test a draft vision which they would invite the sector to comment on with the corollary being that we are not seeking to go to the sector with a finished product
  - There was a discussion about what success looks like. Some of the ideas mentioned were; NZ is a producer of; super foods and super fibre, sustainable / regenerative products, high-value / low impact products, and is agile and a disruptor rather than disrupted.
  - The definition of “super” was discussed. In terms of food, it could mean that NZ produce is superior in terms of nutritive elements and taste compared with other countries. In terms of fibre, it could mean that it is a natural fibre which doesn't exhaust other resources such as chemicals to produce. Related to this, the concept of a circular economy and needing to bring manufacture back onshore were discussed.
  - The following discussions refer to the vision implication statements found in the Vision Deck pages 12, 13 and 14.

#### *World-leading vision implication statements*

- The world class element needs to underpin the vision but given NZ's size and location, it needs to be the ultimate collaborator, an exemplar collaborator.
- In achieving the world-leading implication statements, there needs to be partnership approach adopted by government and industry.
- There was a discussion around whether the funding is supporting the system or the outcomes and going forward what the desired approach is.
- Regarding a strategic commitment by the New Zealand Government to focus and fund the New Zealand science and education system, the vision should lead to the provocation of a discussion and tensions between the government agencies that administer the system.

#### *Environmental sustainability vision implication statements*

- The philosophy of what 'environmental sustainability' means needs to be defined and then the language needs to be tweaked to align with communication of the vision.
- There was a discussion about being regenerative rather than just sustainable.
- The question of how to incentivize change was raised, the statements must encompass the market benefits and illustrate that change in the environmental space can reap benefits for sector participants.

### *Prosperous / value-add statements*

- There was a general feeling that the PSC needed to do more thinking in the area and to look for interdependencies between this and other areas. However, there were also a number of points made, including:
  - There is a lack of true leadership that attracts people to the sector;
  - There is a need for the industry to invest in people;
  - There is a difference between knowledge and capability vs qualifications;
  - There is a need for industry business models to support investment in the area; and
  - There needs to be a 'clear flight path' for the sector to enable it to make the transition.

### **Future capability and investment workstream**

- Coriolis has been commissioned by Callaghan Innovation to conduct a review of the New Zealand Food Innovation Network (NZFIN). Tim Morris from Coriolis spoke to the PSC regarding sector strategy implementation and in particular, implementation of changes to the New Zealand Food Innovation Network.
- The NZFIN was established to provide pilot plant facilities as shared infrastructure for small food businesses. However, it has been indicated that the network is gradually evolving into a much wider economic development role and is assuming the role of incubator hub and scaling-up facility, and there is a question around if it should be fulfilling both of these functions.
- Coriolis has carried out in-depth analysis of the status quo and has looked to situations in other countries. It has concluded that the two best options are to integrate the NZFIN into the CRI framework or to adopt "The Welsh and Irish Model" which involves setting up an industry board, an industry strategy and innovation network which are all well-funded. The latter is ambitious and will require buy-in and coordination across agencies.
- The PSC saw merit in the general approach of the "The Welsh and Irish Model" and agreed that it fits into its capability workstream. The PSC and Coriolis will re-engage at a later stage following on from a workshop with Callaghan Innovation on 28th September 2018.
- Coriolis stressed that NZFIN is an example of a more general issue that implementation is the most important element to a strategy. In this vein, Coriolis raised a point that the PSC has previously discussed, that innovation in NZ often happens in the absence of a defined commercial implementation chain. Coriolis also pointed out that this has implications for the PSC's vision work and that the practical steps needed to make the vision work are a key consideration.

## Decisions and actions

### Decisions made

- Future meetings will likely be held in Christchurch, the venue is TBC (however, the next meeting will be held in Wellington).
- A section from the situational analysis will be incorporated into the Vision Deck to illustrate the starting point (today) and what is coming from over the horizon (future).
- A section on “What success looks like” would be added into the Vision Deck.
- The PSC has signed off the proposal from AERU for the situational analysis with consideration of comments from members and requested commencement of this work.

### Actions from 19 September 2018

	Action	Person	Completed by
1	Engage with person to support the wording of the vision and liaise with MPI secretariat.	Steve Smith	24 October 2018
2	Send around revised vision wording to PSC and request comment.	Steve Smith	24 October 2018
3	Prototype film to illustrate vision to be used to inform PSC discussion regarding vision collateral.	John Brakenridge	TBC
4	Produce outputs from the vision implication sessions and redraft the Vision Deck with the addition of a ‘What does success look like?’ section.	Scott Champion and Lain Jager	24 October 2018
5	Draft summary of meeting for MPI website	MPI	26 September 2018

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## Primary Sector Council – proceedings from meeting on 24 October 2018

- The Primary Sector Council's (PSC) sixth meeting was held on 24 October 2018 in Wellington.
- The overall objectives of the meeting were:
  - Connect with the Primary Sector Science Roadmap Steering Group (PSSRSG) to understand how the PSC Vision fits with the Primary Sector Science Roadmap (PSSR),
  - Discuss the value-add workstream and a proposed value-add index,
  - Discuss the next steps in the Taiao workstream and how to scope this work programme,
  - Discuss the extent of the PSC ambition in addressing the national capability workstream.
- The PSC was also invited to Minister O'Connor's office following the meeting to update him on the PSC's progress.
- Those in attendance were: Lain Jager (Chair), Tony Egan, Stephanie Howard, Julia Jones, Mark Paine, Julian Raine, Neil Richardson, John Rodwell, Steve Saunders, Steve Smith, Nadine Tunley and Nigel Woodhead.
- Those not present were: Miriana Stephens, Puawai Wereta, Shanna Hickling, Hayley Hoogendyk and John Brakenridge.
- MPI officials in attendance: Ben Taylor, Jess Anderson and Lucie Douma (full day), Penny Nelson (part of).
- This document provides a thematic overview of the discussions that occurred.

### Key themes

#### Session with PSSRSG

- MPI provided context surrounding the Minister's expectations regarding the dialogue between the PSC and the PSSRSG. The Minister of Agriculture is keen to understand how the PSSRSG fits in with the PSC's Vision. It was noted that he is passionate about science and thinks there is scope to improve the current science model. The Minister is keen to obtain tangible advice from the two groups on what is working and what is not working.
- There was an idea that a subgroup of both the PSC and the PSSRSG could be created from this meeting to ensure conversation and alignment with the science and vision strategies for the primary sector.



### *Primary Sector Science Roadmap*

- The Chair of the PSSRSG provided an overview of the science roadmap which is a science-led, living document that will have a supporting role to the PSC vision and provide backbone to it. It was noted that while the PSSR is a document which was created under the previous government, it was developed to be an enduring approach. However, aligning the PSC and PSSR will give the opportunity to be able to incorporate objectives and concerns of the current government and sectors.
- It was discussed that there needs to be more clarity and focus around what exactly we want to do. Regarding the document, some further thought needs to be provided around “the what”, for example with climate change, the roadmap needs to consider that if the goal is carbon neutral by 2050, then how will the roadmap support the achievement of this?

### *PSC Vision*

- The PSC Chair provided an outline of the PSC’s progress so far on developing the Vision and emphasised the implications underpinning the Vision which come under the following key issue areas:
  - Taiao (healthy land, healthy water and healthy people) – The impact of climate change is a key concern. This has far reaching implications for policy and strategy in the primary sector. The primary sector has been a strong driver of revenue for NZ and will need to remain a strong driver of export revenue in the future, this is important for all New Zealanders. Increasing environmental pressure means the transition from volume to value is incredibly important.
  - Prosperous/value-added – While it is critical that we move Taiao into the centre of our Food and Fibre strategy from both a positioning and sustainability perspective, a very important supporting strategic focus is to continue to grow value. This is key to being able to grow economic value within sustainable environmental parameters. The PSC is continuing to develop its thinking about how this drive for value across all Food and Fibre participants is best supported.
  - World leading/global – In order to successfully deliver the Vision and the supporting strategies around Taiao and high value there are some areas where we will need to materially live our national capability:
    - The creation of an integrated science, education, technology, innovation and commercialisation eco-system operating in alignment with the Food and Fibre Strategy;
    - Implementation of environmentally sustainable farming systems
    - Supporting national positioning, marketing and value chain design
- Advice to Ministers of the draft vision will be made on this side of Christmas.

### *PSC and PSSRSG convergence*

- The importance of understanding how the PSSR and the PSC Vision align was emphasised. The PSSRSG was keen to discern if there were elements of the PSSR that could be adjusted or augmented to better support the PSC Vision.
- There was support for the idea that the PSSR should flow from the Food and Fibre vision and strategy and a good discussion about whether this strategic lens was broad enough. For example should the PSSR also reflect the needs of all New Zealanders? environmental interests?, or the tourism sector?. There was general support for a broader view, though with a sensible/ balanced applied focus.
- There was a general view that the content of the PSSR was very good but could be made richer through the inclusion of clearer longer-term strategic goals around Taiao and value growth. This would support both stability of the PSSR and also prioritization of the various science streams.
- While there was good PSC support for the content of the PSSR, there is concern the current funding and delivery model is suboptimal:
  - The funding model changes too much from year to year. This causes too much focus on obtaining funding and undermines funding for core capability and long-term strategic imperatives;
  - The funding model for applied science could shift to enable more direct relationships between research providers and business and an effective co-funding model could lift industry investment;
  - In the current system there is no push back on funding being partitioned to support the maintenance of core capability and fundamental science;
  - The fragmentation of the commercialisation capability was a source of frustration and the lack of accountability by science partners in this space undermines business confidence;
  - Too little inertia in the system and specifically a lack of clarity and alignment to long term priorities were also thought to be a problem
- There was a discussion around how to achieve an improved co-design culture between industry and scientists. The importance of a long-term science strategy was acknowledged by both scientists and industry representatives at the meeting.
- Overall, the PSC and PSSRSG agreed that in their discussions they had identified a number of symptoms of a sub-optimal science system. There was a discussion of whether the current architecture of the system is appropriate to support Food and Fibre Sector needs. The general consensus being that there was an opportunity to transform the system for Food and Fibre related science along the lines of the Wageningen University model, i.e., the adoption of a less fragmented, more coherent, more networked, more strategically focused approach.

### *Looking to international examples*

- There was a discussion regarding Wageningen University in the Netherlands which went from a relatively “broke” institution to the number one agricultural university in the world. NZ has the potential to do the same thing if it can obtain alignment. The Dutch system worked because a top-sector group was established comprised of 30 members of the agriculture and food industry from universities, industry and government. The Dutch government backed the group and funded investments, these investments were measured on outcomes and the top-sector group was held to account. They now have a national strategy in the Netherlands. Ireland and Israel were also looked to as examples of countries with national strategies, and the alignment of the tax-system with foreign investment in Ireland was mentioned.
- It was mentioned that NZ’s science system is highly fragmented and could benefit substantially from a centralised way of aligning all of the components of the science ecosystem, which is also evident in China.

### *Going forward*

- MPI indicated that the approach for providing advice to the Minister would be to provide some recommendations before Christmas with options. There needs to be a prioritised list rather than a long ‘shopping-list’. s 9(2)(b)(ii), s 9(2)(g)(i)
- It was mentioned that the PSSRSG would like to further develop this piece of work, informed by the morning’s discussion, and then come back to PSC to consult on the list of recommendations. This may be in the form of a joint subgroup.

### **KPMG proposal, related to Taiao and Value-add workstreams**

- For this discussion, Ian Proudfoot from KPMG was phoned into the meeting to discuss the KPMG proposal. He described two possible indexes that KPMG are looking into which could potentially fit into the PSC’s value-add and Taiao workstreams.

### *Sustainability index*

- The first index is a sustainability index which could provide a benchmark to New Zealand primary producers, it would be based on data that is already collected as part of integrated reporting which is likely to be universally expected from businesses in the future. The objective is to demonstrate the performance of New Zealand in terms of sustainability.
- PSC members challenged the validity of an index in the presence of other programmes such as the Red Meat Profit Partnership and reflected on potential push-back towards the data and measuring scales that would be used in the index. It was noted that the index would be evolved over time and there would always be an opportunity to change it as new data becomes available.

- Some PSC members expressed the opinion that the index is essential to communicate baseline levels and hold the New Zealand primary sector to account for its behaviour. The data will be largely collected from a regulatory environment which will only convey baseline performance and not ambitious performance. Given this, the data will be robust and different sector groups or businesses could use the index to demonstrate how they are performing in relation to baseline, e.g. “we are exceeding x level in the national index”. However, it will not measure or demonstrate ambitious performance.
- There was a suggestion from the PSC to add some milestones or dates to the index to drive change implementation.
- This index would knit the Taiao workstream together as it’s about the environment and the impact it has on people, which this index could demonstrate. It could be used as a tool to support realisation of the Vision and it could be used in the dialogue with industry about the Vision. It was noted that the PSC’s responsibility should be to define the criteria on which the index should be based.
- There was a conversation about how to gain buy-in and it was mentioned that currently, different sectors are comparing performance to each other without one set of dimensions or data. The index would provide a common basis and one source of data to be used for gauging performance.
- It was also mentioned that NGOs must be on board with such an index.

#### *Value added index*

- The second index that KPMG are looking into is a value-add index, which was assessed to be significantly more complex from a design and construction perspective compared to the sustainability index. The complexity stems from the different products, markets and value chains that span across the sector, this index would require some generalisation.
- The objective of this index would be to demonstrate that New Zealand is using its land and resources for the benefit of all New Zealanders and that they are being used in a manner to obtain the most value.
- As has been debated by the PSC in previous meetings, arguably New Zealand is under-performing in the value-add space, and that going forward, more value must be extracted from a smaller environmental envelope. However, at the moment, it’s felt that New Zealand is unable to have this conversation as we have no way to measure value-add. The PSC indicated that it would want to see a trend over time in terms of within-sector-comparisons.
- It was emphasised that there will be a reduction of capital investment in New Zealand unless we can modify our approach to value-add by increasing productivity and

ensuring we maintain a high-value production chain. The importance of foreign capital was mentioned, New Zealand needs to be an attractive place to invest in.

- There is a role at the macro level for government to fulfil in terms of funding to support businesses develop value-add strategies. The funding programmes provided by AGMARDT were looked to as an example of what needs to happen at the macro level. It was mentioned that NZTE is not structured to provide large, high-level funding.
- There is a psychological element that if people don't see the impact straight away, then they are less likely to believe it will pay off in the long-run. There is a long lead time with value-add strategies, with 20-30 years mentioned in relation to the wine and kiwifruit industries. The sectors cannot be built up any faster without further investment.
- Given our environmental and social pressures our farmers are being told to grow/farm different crops and to change their farming systems in order to get more value added products coming from NZ. However, there are no resources being put into this to assist farmers with change or how to get these products to market. Some of our most profitable industries such as wine were assisted by the government. In 1984 the government provided subsidies to wine growers to pull up vines to address a glut that was damaging the industry. Many growers used the grant to transition from less economic varieties to more fashionable varieties. This sort of assistance is not currently being considered to aid the primary sector of today. There are sectors emerging globally such as insects that are also not being considered in NZ.
- There was a general consensus that, taking into account the complexity and cost of assessing value add at industry or sector level, if there was going to be any initiative in this space it would be pitched more to assist with design at enterprise level.

### **Taiao workstream**

*Please refer to the Taiao document (E Workstream outline) in the SWS under Workstreams/Taiao.*

- Stephanie Howard is leading this workstream. An offer was made for PSC members to express interest in joining a subgroup for this workstream, so far John Rodwell has signed up.
- It was discussed that further time and expertise was required to design this workstream and specifically to identify where there is an expectation for the PSC to voice a position; such as environmental sustainability, climate change and nutrient overloading.
- There was the suggestion to develop a high-level brief and engage external expertise to pick up the workstream from this point. Before a brief can be developed it is important to determine what the PSC's take will be on these issues as it is a crowded space and much research has already been done.

- It is too early to come up with a brief until the PSC's vision and views have been articulated. For example, there are carbon neutral aspirations for NZ so research could be done on 'what does this look like for farmers' what do they need to do differently to achieve this vision. It is important not to repeat research that is already done therefore the brief needs to clearly articulate what the outcome of the research will be that aligns closely to the PSC vision statement.
- There was an appreciation for adequate communication to farmers and this means getting the right messages to farmers at the right time.

### **National capability workstream**

- There was limited discussion for this workstream due to timing.

### **Meeting with Minister O'Connor**

- After the meeting, the PSC, secretariat and the PSSRSG Chair attended a meeting at Minister O'Connor's office in Wellington.
- The PSC provided an overview of progress on the Vision statement and of its work so far in determining the implications that underpin the Vision. The PSC and PSSRSG Chairs also described how the two groups' have converged on a number of ideas regarding the science and education system alignment.
- The Minister encouraged ambitious recommendations from the PSC and expressed a sense that he does want them to feel constrained by how they think government might work.
- The Minister encouraged the PSC to engage with other groups such as the Farming Leaders Group and other groups being set up by his ministerial colleagues.
- The Minister is happy with the PSC's work and is very keen to engage with the PSC on the Vision in early December and would like to include a number of his ministerial colleagues in this meeting.

## Decisions and actions

### Decisions made

### Actions from 24 September 2018

	Action	Person	Completed by
1	Provide feedback on the Science Roadmap via survey monkey (TBC)	MPI	TBC
2	Nominate members for sub-group with Roadmaps Steering Group	Everyone	15 <sup>th</sup> November 2018
3	Draft summary of meeting for MPI website	MPI	2 <sup>nd</sup> November 2018

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## Primary Sector Council – proceedings from meeting on 28 November 2018

- The Primary Sector Council's (PSC) seventh meeting was held on 28 November 2018 in Christchurch.
- The overall objectives of the meeting were:
  - Insights from the sheep and wool sector.
  - Presentation and discussion of the vision statement and its communication by NZ Story.
  - Discuss the progress of the Taiao workstream.
  - Discuss the messaging of the national capability workstream.
  - Investigate whether the PSC should take a view on the GM/GE issue.
- Those in attendance were: Lain Jager (Chair), Tony Egan, Stephanie Howard, Julia Jones, Mark Paine, Julian Raine, John Rodwell, Steve Saunders, Steve Smith, Nadine Tunley, Nigel Woodhead, Miriana Stephens, John Brakenridge and Shanna Hickling.
- Those not present were: Puawai Wereta, Hayley Hoogendyk and Neil Richardson.
- MPI officials in attendance: Ben Taylor and Lucie Douma.
- This document provides a thematic overview of the discussions that occurred.

### Key themes

#### Session with NZ Merino

- NZ Merino provided context around their vision of the sheep industry. They currently have an incubator under construction based in Christchurch. This is to encourage innovation and to develop thinking in the sheep industry.
- The incubator is designed to answer questions such as 'how can farms enter into the carbon sequestration debate to create a competitive advantage for the industry e.g. become carbon negative'. There is a drive to consider the wool index, in particular; ghg, water use and animal welfare with an attempt to monitor these issues directly on farms, to allow farmers to see how they are performing and where they can improve.
- The principles of the incubator align with the Sustainable Development Goals. Start-ups are invited into the space to investigate the potential of wool and the different industries it can be a part of.
- The wool industry has changed significantly where it used to be 100% of sheep sold at auction. This is now 70% with the rest holding premium product status (such as merino wool) and is sold through contracts, not auction. This is an example of how we can value-add to the product at the primary sector level.

### Session with NZ Story on the vision statement

- NZ Story provided background to what the NZ Story is and how NZ is viewed overseas. The key points to take away are:
  - What NZ takes to the world needs to represent who we are and what we are capable of while also addressing what our trade partners say are important to them.
  - NZ is seen as warm and welcoming and we are trustful. International markets want to build long-term relationships with us.
  - Concept of guardianship (Kaitiakitanga) comes through in all our markets – we innovate but don't destroy what is important, we know we have problems, we are judged for the way we recognise and solve our problems. These characteristics are coming through consistently in our trading countries.
  - In tourism we have the principle of kaitiaki - concept of asking visitors to protect our land and to take care of our land, themselves and our people while they are here. Used in tourism with waste, great walks etc.
- NZ Story shared their working drafts of the vision statement to obtain feedback from the PSC. NZ Story was engaged to develop the vision for the PSC and first held a workshop at Lincoln University. The Lincoln workshop's outcome was a long full vision which was further refined in house. At this meeting the two draft statements were shared with the full PSC to obtain feedback and refine the vision statement further to finalise it.

### PSC Vision

- NZ Story shared two vision statements with the PSC group for feedback and direction. The first one is more practical and on the ground, whereas the second option is more emotional and high level. The feedback from PSC was:
  - The missing element from both visions was the concept of Manaaki – people connecting with people, this is important to be in the vision statement.
  - Some members preferred option 1 over option 2 because it states that the principles of kaitiaki are self-generated from us, this has greater meaning to the people in the room. This option is action focused and on the doing, where option 2 is weaker on the action front and more a serving others approach. With option 1 we are doing it because it's who we are, whereas option 2 doing it because it's meeting someone's need. Option 1 helps to create a connection. Farmers will understand better – however they also understand the emotion. Members from the PSC appeared to like the 'distinctive product' wording as the primary sector is reliant on this. This is something people can believe in and be passionate about.

- Other members preferred option 2 as the buzzwords in option 1 can be distracting. Option 2 has the emotional connection to it – easier to get a feel of the land and people. There was general agreement and like for the ‘gentler presence and stronger sustainability’ wording as well as ‘continually reset’ (however, this is not the reason we are kaitiaki, it’s because it’s the right thing to do, not referencing off the world) – this is reminded to us that we need to keep going, we cannot take status quo for granted. Members liked the word ‘Honour’ – this is a strong word and not superficial. Emotive connection – like the words ‘we call home’. Sometimes vision needs to be a little fluffy. We need to capture hearts and minds and this vision does that.
- It is important to understand who the audience for this vision is. This is three-fold; farmers voice, appealing to people overseas, pledge to wider NZ. The vision needs to convey ‘this is us and this is where we are going’. Option 1 and 2 merge might be the best way to go. The audience is us – it is internal. We need to know the audience this is to resonate with, this is really important. This will form part of the communications plan and the stakeholder engagement.
- The PSC vision is important to get right and to have the buy-in from stakeholders. The PSC vision aims to guide the industry body visions and strategies – this is the pan sector leadership position.
- Some members thought that as part of the vision deck that will be communicated with stakeholders there needs to be a video that will set the context and explain the purpose for the vision. This video needs to be emotive and thought provoking – set the emotional scene and then back this up with rational claims within the rest of the slide deck. The vision deck needs to have both emotional and rational triggers.
- The MPI Biosecurity video is a very good example of the type of video that the PSC intends to develop.
- As part of the vision we need to know what success looks like – the criteria for this needs to be achievable and measurable. John Brakenridge and Steve Smith offered to assist with defining the criteria.

### **Taiao workstream update**

*Please refer to the Taiao document (E Workstream outline) in the SWS under Workstreams/Taiao.*

- Stephanie Howard and Miriana Stephens reported back to the PSC where they had got to with the Taiao workstream and to obtain feedback and further direction from the group.
- The main purpose of this session was to set the context of Taiao and to obtain feedback on the Taiao framework.

- Taiao relates to the environment and this is important to consider in the vision as it is the base for the way we make food. The nature of the challenges in this workstream are transformative action – it is more than just significant change.
- Transformative action could mean a change in what we do, rather than just how we do it. Land use change needs to be considered. On an individual farm this could mean diversification, lower stock/product farming intensity or complete land use change. Mitigation and efficiency gains are important to consider however this may be sufficient on its own to drive towards the vision outcomes (i.e. how we measure success).
- Taiao is not just about the food and the fibre but also the land and the rivers. Change is needed because the land and the rivers can no longer support the burden put on them in terms of the land usage. It was discussed that science will drive land use change, through land classifications.
- It was proposed and generally agreed by the PSC that the livestock issue needs to be addressed directly s 9(2)(ba)(i), s 9(2)(g)(i)  
[REDACTED]
- Nitrate leaching does not only come from dairy, horticulture also has a part to play. s 9(2)(ba)(i), s 9(2)(g)(i)  
[REDACTED]
- The group generally agreed that the three aspects to consider under Taiao are land, water (including fisheries and the connection to the sea) and air. A framework needs to be set with questions asked – not answering of the questions. DoC has done a lot of work in identifying the connections, this is important to take a look at with the development of a Taiao framework.
- Miriana Stephens presented on Wakatu and what their intergenerational vision and what the 5 key outcomes to achieve that vision are. They are trialling their vineyards which have been mapped on their carbon sequestration and exactly what the health of the land is – planting is by design and history i.e. replicating what was there in the 1800's in terms of bird corridors and native tree species.

#### *Taiao framework*

- It is important to create a framework we, as a country, want to work towards. A draft framework was tested at this council meeting and the intent of the framework is to guide the discussion of what is meant by Taiao and environmental limits. The framework allows people to connect with it and see where their role and place is within it – it is something authentic we can test with stakeholders.

- The primary audience of this framework is farmers – it needs to appeal and be understandable for them. The framework needs to tell the story of the vision. This is a working progress and some more work is required to articulate the story better. Possibly we engage with an external party who are good at articulating stories.

#### *Taiao outcomes*

- The Taiao pillars were presented by Stephanie. The feedback from the other members was that the pillars need to reference oceans and people as well. They need to align to the wider environment i.e. the situational analysis, current government programs and demonstrate what the gap between the vision and current activities is.
- Not everyone in the industry will be able to keep up with the changes. Once water prices, nitrate and carbon responsibilities come into force this will need to be accounted for on farm enterprises. It is estimated that about 11% of the dairy industry will not want to change, or cannot change therefore will be removed from the industry. It is important that we assist with their land use change and we make this as easy as possible for them, using soft levers.
- There was the suggestion that a certification is put in place such as a 'healthy choice mark' for the food and fibre sectors that assures a certain quality/operational process. This is something that can be suggested to stakeholders at a high level during the vision deck engagements.
- If a certification path is introduced we need to ensure that a tick of certification is something that everyone can believe in and is not something that tries to cover everything, e.g. it just focuses on water and carbon.

#### **National Capability workstream update**

- From Minister O'Connors lead the PSC has the opportunity to be free and frank with advice on possible changes in the national capability space to improve the science and University systems.
- If the Food and Fibre sector is to double in size by 2060 (as per the situational analysis) we need to seriously consider our national capability in the primary sectors. The proposal to the government will be to investigate and reconfigure a subset of the science and education sector and align this with Food and Fibre by:
  - Redrawing the funding system
  - Encourage capital investment in the research that is being funded.
- There was general agreement from the PSC members to the above proposal highlighting that we should stay away from the solution to improve national capability, rather there is a need to explain that the system is broken. This requires talking in terms of capability including science, technology, commercialisation and knowledge.

- A good exemplar for the NZ system to learn from is the Wageningen University model, where the funding and support is third government, third CRI's and third industry. Research is then judged on outcomes produced rather than milestones met along the way. With industry Government partnerships in NZ, industry should be able to lead and give science the delivery and accountability of meeting the outcomes. Industry and science partnership design is very important to get right.
- Currently the science system is not geared up to deliver on the climate change expectations. There is a need to create an institution/funding model at scale – however the design of this model is very important to get right. The system is likely to be delivered by a design group. This is to be food and fibre driven, however, even the design of the design group is important because we cannot just take a 'today' lens. We need to be future looking as well. We don't know what will hit tomorrow.
- There was general agreement from the members that the scientist's behaviour comes from the funding model. The funding model is the problem and scientists spend more time applying for funding than actually doing the science. Currently the model is not world class, it is not agile, doesn't allow effective Government and industry partnerships and it is not appropriated correctly to the size of the food and fibre sector. Another issue is that there is not enough science celebrated in NZ.
- What does the science structure look like with the big things coming. It needs to be different to what it currently is. There needs to be more capability applied to agile science, not just deep thinking science. If we can get the funding model more focused and outcomes oriented it will deliver better for NZ. Create a system that is fit for purpose to meet applied goals.

### **GM/GE conversation**

- The PSC members discussed GM/GE and whether the PSC should take a stance on the issue, what type of stance should this be (i.e. proactive or reactive) and should there be communication around it.
- The proposed position the members are considering is:
  - GM technology adoption should be assessed on a cost (and risk)/ benefit basis;
  - A fast follower approach is recommended for the adoption of GM technology, i.e., NZ should not be seeking first mover advantage in this space;
  - The context is very dynamic as the technology, its potential applications, and public (market) perceptions may change rapidly over time – that means the cost (and risk)/ benefit should be considered on a continuing basis
  - The current policy framework allows for the assessment/ approval of potential GM tech releases on a case by case basis and is adequate to support the proposed strategic approach

- The PSC supports the continued exploration of GM technology by New Zealand scientists as allowed by the current policy framework.
- For the proposed communications of the GM position, the members are not considering a forum. The proposal is a clear PSC position on the issue which can be used if they are asked for it. This is a reactive approach.

**Next steps**

- The PSC have a meeting with Ministers O'Connor and Parker on the 13<sup>th</sup> of December to discuss the draft vision pack and to obtain feedback from Minister level prior to industry consultation.

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## Decisions and actions

### Decisions made

### Actions from 28 November 2018

	Action	Person	Completed by
1	Summarise the GM/GE discussion/position and circulate to the PSC group for further comment.	Lain Jager	3 <sup>rd</sup> December 2018
2	Prepare a brief with the value proposition for MPI to develop the video for the vision slide deck.	Steve Smith	17 <sup>th</sup> December 2018
3	Provide any raw video footage from Ko Tatou to assist with the production of the vision video.	MPI	20 <sup>th</sup> December 2018
4	Taiao workstream to engage with MfE and provide half hour report back to PSC members on their water and climate change work programme progress.	Stephanie Howard	13 <sup>th</sup> December 2018
5	Draft summary of meeting for MPI website	MPI	5 <sup>th</sup> December 2018

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## Primary Sector Council – proceedings from meeting on 13 December 2018

- The Primary Sector Council's (PSC) eighth meeting was held on 13 December 2018 in Wellington.
- The overall objectives of the meeting were:
  - Finalise the draft vision statement
  - Discuss the Taiao workstream
  - Discuss the draft vision slide pack
  - Discuss the meeting with Ministers
- Those in attendance were: Lain Jager (Chair), Stephanie Howard, Mark Paine, Julian Raine, John Rodwell, Steve Saunders, Nigel Woodhead and Shanna Hickling.
- Those not present were: Puawai Wereta, Hayley Hoogendyk, Neil Richardson, Miriana Stephens, John Brakenridge, Tony Egan, Julia Jones, Steve Smith and Nadine Tunley
- MPI officials in attendance: Ben Taylor and Lucie Douma (full day), Emma Taylor and Catherine Wilson (morning).
- This document provides a thematic overview of the discussions that occurred.

### Key themes

#### Update from MPI work programs

- MPI will be producing a positioning paper to follow on from the Primary Sector Council's vision that sets out the context and describes the big challenges and opportunities that are heading towards the Primary Sector. The timing and what type of document this will be is still being discussed internally.

#### PSC vision and vision pack

- The wording 'prosperity' should be included in the vision
- Including the word 'natural' is loading as it forms an opinion on GM/GE issue – however, this interpretation is not agreed on by every member of the group. Better to keep the word out as it raises more questions.
- Change the word 'oceans' to 'water' to include fresh water aspects.
- Need to test the phrase 'proud kaitiaki' to ensure it is framed correctly.
- There was a dry run of the vision slide pack with changes highlighted.

### Video to accompany the vision

- John Brackenridge's script is the base for the storyboard – this needs to be started this side of Christmas. The script will be sent out with mark-ups to all PSC members for a final chance for input. This will also go to the Farming Leaders Group (FLG) for input.
- The video will be produced and led by John Brackenridge. Steve will be working with John to get the video underway with the designers.

### PSC Vision engagement plan

- The vision will become a public conversation. This is unavoidable given it will be in the media therefore the conversation will be wider than the Food and Fibre sector.
- The Primary Sector will be engaged with on the draft vision and it is expected that 30/40 different companies/enterprises will be engaged with in some form.
- The PSC members will all be part of the engagement. One – two members of the PSC will be at each conversation. They will be supported and attended by MPI personnel to line up with the MPI positioning paper. MPI needs to ensure the appropriate level of MPI personnel are in attendance. The consultation process is very important to get right and will be a combination of MPI and PSC.
- Julia Jones is producing and leading the engagement strategy and planning.
- It would be useful for the PSC to have a timeline of when things are expected to land i.e the ICCO deliverables and climate change work etc.
- The PSC needs to obtain wider permission from iwi to go out with the vision statement. We may not be addressing enough of Maori views, it's a pakeha view – do not want to be seen as token. Mariana will lead the outreach of getting Maori endorsement. When we use construct and the language used we need to obtain Maori endorsement. What permissions are required? What does permission look like? Engage with FOMA.

### Farming Leaders Group

- The PSC does not have the mandate from the sector to undertake the work to come up with a Primary Sector vision – this has come from Ministers. This has implications on effective engagement with the sector. The FLG are a group that has taken a leadership position in the sector. It is important to close up the gap between the PSC and FLG as they will sponsor/support the pitching of the vision. s 9(2)(ba)(i), s 9(2)(g)(i)

██████ FLG might need a new constitution to become a top level group as sector leaders possibly include Forestry and Fisheries in their membership – ██████ s 9(2)(ba)(i), s 9(2)(g)(i) ██████

- FLG is not formalised. It is an informal group that got together because they wanted to see change in the sector. The group should form up and strengthen to become the Food and Fibre top group. The FLG have pledged their believes and goals.
- s 9(2)(ba)(i), s 9(2)(g)(i) ██████
- s 9(2)(ba)(i), s 9(2)(g)(i) ██████
- Questions we have are:
  1. Do we need a top group? Yes – to empower the Food and Fibre sector to take a genuine critical view it is required.
  2. What kind of top group? It will need the largest players in the industry. ██████ s 9(2)(ba)(i), s 9(2) ██████
  3. What is the membership? Architecture of the group is important.
  4. How do we get the CEO's onboard? FLG is good for the leadership but it's the CEO's and management that do the implementation.
- A lot of convincing and engagement needs to be done over the first quarter of 2019. An attempt needs to be made to talk to forestry and see what they say and where it could lead.
- Lain will meet Minister O'Connor with Mike Peterson (FLG chair).

### Taiao workstream

- Stephanie has the lead for the Taiao workstream – there is a possibility that MfE can help fund the sub-group.
- Membership includes: Stephanie Howard, John Rodwell, Miriana Stephens, Shanna Hickling, Nigel Woodhead, Julian Raine and Mark Paine.
- It is important for the sub-group to consider climate change. They need to find out:
  - What is MPI already doing in the environment space?
  - Where is govt at? This is the link between industry/farmers and government and system failure needs to be addressed.
- Potentially link in with the Land and water science challenge – Ken Taylor

### **Next steps**

- A Ministers meeting will be held on the afternoon of December 13 with Minister O'Connor, Minister Parker, Lain Jager, John Rodwell and Mark Paine. At the meeting they will ask about setting up a sub-group for Taiao and test the draft vision statement with them.

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## Decisions and actions

### Decisions made

- Draft vision statement was agreed and voted on by members.

### Actions from 13 December 2018

	Action	Person	Completed by
1	s 9(2)(ba)(i), s 9(2)(g)(i)	Miriana Stephens	20 <sup>th</sup> January
2	Send out video script with mark-ups to all PSC members and FLG.	Lain Jager	14 <sup>th</sup> December
3	Kick-off the development of the video	John Brakenridge	24 <sup>th</sup> December
4	Develop a timeline for PSC for when various government group deliverables are due	MPI	20 <sup>th</sup> January
5	Obtain Maori approval to go out with the vision statement.	Miriana Stephens	20 <sup>th</sup> January
6	Meeting with Minister O'Connor and Mike Peterson	Lain Jager	31 <sup>st</sup> January
7	Draft summary of meeting for MPI website	MPI	15 <sup>th</sup> January

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## Primary Sector Council – proceedings from meeting on 31 January 2019

- The Primary Sector Council's (PSC) ninth meeting was held on 31 January 2019 in Wellington.
- The overall objectives of the meeting were:
  - Finalise engagement plan
  - Review final vision statement
  - Discuss the vision video/story for vision deck
  - MBIE to present the potential new H&S updates.
  - Discuss Taiao workstream
  - Discuss Marketing NZ's Food and Fibre and NZ Cuisine
  - Discuss the National Capability workstream
  - PSC budget update from MPI
  - Connect with the Farming Leaders Forum
- Those in attendance were: Lain Jager (Chair), Stephanie Howard, Mark Paine, Julian Raine, John Rodwell, Steve Smith, Nigel Woodhead, Neil Richardson, Nadine Tunley, John Brakenridge, Julia Jones.
- Those not present were: Puawai Wereta, Hayley Hoogendyk, Miriana Stephens, Tony Egan, Steve Saunders and Shanna Hickling.
- Afternoon: Farming Leaders Forum – Mike Petersen, Katie Milne, Jim van der Poel, Andrew Morrison, John Loughlin, Bruce Wills, Barry O'Neil, Dr Ian Walker, Hugh Ritchie, Malcolm Bailey.
- MPI officials in attendance: Ben Taylor, Lucie Douma, Libby Rees and Catherine Wilson (full day). Emma Taylor, Penny Nelson and Ray Smith (Afternoon).
- This document provides a thematic overview of the discussions that occurred.

### Key themes

#### Opening from Chair

- Today's meeting was attended by the Farming Leaders Forum (FLF) and their main focus and reason for being is in relation to water quality and carbon.
- Not all of the FLF group are at the same position, some are further ahead in the journey than others. The Farming Leaders Forum can help to facilitate the engagement on the Vision. s 9(2)(ba)(i), s 9(2)(g)(i)
- s 9(2)(ba)(i), s 9(2)(g)(i)

[REDACTED] There needs to be a design conversation about the make-up of a peak group. Need to be aware that some sectors do have big challenges to face.

- Data analytics is something that is getting very big. For example Tesla has changed the automotive industry through people who knew nothing about cars. The building of cars is easy it's the re-thinking of the model that is the hard part. This has resulted in car companies being sold to silicon valley. s 9(2)(ba)(i), s 9(2)(g)(i)

[REDACTED]

- The primary industries are about to enter a phase of brutality not seen since the 1980's. The PSC's role is not to destroy the industry but to help it change fast. Some industries are closer to understanding the changes required than others.

- s 9(2)(ba)(i), s 9(2)(g)(i)

[REDACTED]

- The vision deck is going to say that change is happening, it is then asking whether we want to be world leaders of laggards. The argument is not with the industry groups. The challenge is that transition is very hard and is about what we are willing to give up.

- s 9(2)(ba)(i), s 9(2)(g)(i)

[REDACTED]

### Engagement strategy

- A stakeholder engagement plan has been developed and all the documents can be found in the shared drive. It is important not to over engineer the engagement strategy.
- MPI needs to be included in the engagements as much as possible because after the vision has been finalised they will lead the 'so what' part and develop the next steps on how the vision can be realised. Therefore it is very important for them to be part of the engagements.
- Each engagement is categorised 1-4, as a measure of type of engagement (ie. 1 = Face-to-face, 4 = email). Some priority engagements will require attendance from Lain as well as senior MPI representatives ie Penny Nelson or Ray Smith. At least



two PSC members will attend each engagement. The goal of the engagements is to prioritise the feedback gathered from audiences, MPI will collect, collate and theme feedback into a coherent form post engagement period.

- Currently the list includes all domestic organisations. There was a point raised on whether we should be looking further down the value chain to understand what our customers also want. What do our international export markets want? It was agreed that a focus group could be set up with international participants including <sup>s 9(2)(a)</sup> [REDACTED] (in-confidence) to test the vision with. It is not about the selling of the vision but need to listen to them. Julia to facilitate this session and include John B, John R, Neil and Steve Smith – they will take the conversation away from the full PSC group.
- Another point was raised to include the banks as they fund the primary sectors and they are hugely influential in how growth is achieved through the funding mechanisms.
- The PSC went through the engagement plan and put members names next to appropriate organisations that they would be best placed to engage with. It is important for all members to review this list and ensure they are happy with it. Engagement will take place once the video as part of the vision deck is ready. John B suggested this would be ready at the next PSC meeting on Feb 21.

### Vision Statement

- It is important to be clear on who the vision statement is for.
- There was discussion on whether 'whakapapa' is being used in the correct sense therefore it should be framed differently such as with 'we aspire to be good ancestors'. Ancestors is becoming a catch-phrase around the world and it fits well in the global context.
- The word 'trusted' should be added after distinctive, before sought-after in the vision statement. Trust forms part of the 'good ancestors' story, but this is inherent so could it be used under the vision rather than in the vision. This was tested by members of the PSC who stated that right now farmers are not trusted which is why it needs to be included in the vision – there was general agreement on this point, because it is needed for the community conversation. Sought-after looks to the complete supply chain – it says something about customers, value chain and products, it entails all.
- 'Oceans' was originally put in to bring on board the seafood industry, land was supposed to entail rivers, lakes etc. Every word has a meaning. 'Water' needs to be explained, such as does it include oceans? It was agreed to use 'water' as pillars can come underneath the vision that provide a basis for the conversation around rivers, lakes and oceans.
- 'partnered with nature' should replace 'sourced from nature'. 'Sourced' provides too much of a stance on GM and some members of the PSC thought this was good as we cannot compete against GM on the world stage therefore by claiming GM free that would be NZ's unique position statement. This point was contested by other members who stated that a vision statement looks at minimum 20 years into the

future and would this stance still be relevant in 20 years, are we risking cutting out the potential of GM. It was agreed that 'partnered with nature' was a strong alternative that embodies taiao, instead of taking from nature we are working with nature. This provides a good pillar to have a conversation from.

- Pillars will provide greater depth to the meaning of the words in the vision statement. An additional slide will be added to the slide deck to communicate the pillars. The framework needs to articulate the pillars well. This project is be developed by Neil, John B and Steve Smith.
- Taiao has a fourth element – 'air' – and this needs to be updated in the vision deck.

### **Vision deck**

- John B then discussed his vision deck and the way he would present the vision to his audiences. This was received well by the PSC group and a discussion followed around how the vision should be business led and government enabled.
- It was discussed that it would be useful to have a list of agreed exemplar behaviours to mirror the vision statement that can be drawn on when presenting to various audiences. These may or not be easy and would be used by the presenters to discuss the potential implications of the Vision with various audiences – importantly some examples will be at a strategy systems level and some will be at a more specific level tailored to the industry such as the use of nitrate sensors in farm soils.
- Developing a list of approximately 10 exemplars will aid the discussions and give life to the vision statement. These are to be developed by PSC members and collated by MPI. These exemplars will look different for each industry. Each slide deck will need to be populated with some wins.
- It was also agreed that each PSC member is allowed to make the vision deck their own and present it the way that feels best for them as long as there is consistency in the vision statement. The way it is presented is at the discretion of the presenter – however to ensure an audit trail is maintained, each presentation and the group it is presented to needs to be sent to MPI.
- Key feedback to get from the engagements is:
  - What is working for you in the current environment?
  - What is not working?
  - What are the regulatory barriers?
  - Is the vision bold enough?

### **Update on video/story for vision deck**

- The revised vision statement will be communicated to the third party tasked with designing the video. The video is an asset in engagement and will accompany the vision deck. The story speaks of two alternative futures for Aotearoa New Zealand; one with doing nothing and one with how we managed to change before it was too late.

### **MBIE health and safety update**

- MBIE presented their health and safety amendment updates and how this could have far reaching implications for the agriculture sector. They requested assistance with who they should engage with in the industry to get robust discussions and feedback on the proposed changes.

### **National capability discussion**

- This discussion has been deferred to the February 21 meeting.

### **Taiao workstream discussion**

- This discussion has been deferred to the February 21 meeting.

### **Marketing of New Zealand's food system**

- The discussions on 'Marketing NZ's Food and Fibre to the World' and 'Characterisation and marketing of NZ Cuisine' have been deferred to the February 21 meeting.

### **Budget update from MPI**

- The budget for PSC business is \$400,000-500,000 per annum, including \$150,000 for secretariat support.
- The amount is also inclusive of consultants and contracted reports, all PSC meetings and sub-group meetings and travel.
- At this stage just over half the budget has been used therefore there is approximately \$200,000 remaining to undertake the stakeholder engagement process.

### **Farming Leaders Forum Afternoon session**

- It was mentioned by individuals of the FLF that we need to produce more food, with a shrinking base from which to do this. This food needs to be of higher quality, more nutritious and lower footprint, therefore GE needs to be part of the conversation.
- Two key priorities were identified; social license and generational change for the primary sector. There is a need to flip the negative rhetoric and focus on positively reinforcing genuine change.
- There was broad consensus around the revised vision statement of PSC and it was noted that there was alignment with individual industry body visions (ie. Healthy food, for all, forever – HortNZ). There was a mention to keep the vision word count down. It is important to note that the vision is similar to the one the FLF came up with as well.
- The inclusion of the concepts of Taiao and being a good ancestor were singled out as a really meaningful elements of the PSC vision, they resonate strongly with New Zealand industry.
- An emphasis on ensuring the vision takes 'everybody' with it – keeping it realistic but also being bold given that it is visionary in nature. An appreciation that the vision will be easier for some industries to realise than others. In some cases it is already a reflection of their current practices. It needs to be aspirational for all in order to 'take

everybody with us’.

- Discussion around how far to push the vision ‘out’ concluded in the balance between boldness and a willingness to accept the consequences of being bold. However, a need to avoid shocks comparable to historical change in NZ primary sectors with this vision and the subsequent industry change required. s 9(2)(ba)(i), s 9(2)(g)(i)  
[REDACTED]
- There was agreement that change is required but a need to prioritise changes and to undertake the low hanging fruit first. Funding for Research and Development and focus on extension – currently underutilised as a channel for distribution of knowledge/skills in the primary sector. There is a capability shortage in identifying added-value opportunities. There was also advocacy for the PSC to encourage more funding from government for R&D to obtain a carbon free 2050. s 9(2)(ba)(i), s 9(2)(g)(i)  
[REDACTED]
- There was a general consensus that the vision needs to be coupled with a framework and a roadmap for transformation that can be clearly articulated with exemplars and early wins to answer the questions – What is expected of me? What do I need to do differently today? Change fails because of the way it is executed.
- All FLF members were in support of the vision in principle, but it comes down to how it is executed. How to set the right dynamics and drivers within the market is very important – it is also important to distinguish each industry, i.e. grapes and vineyards will not be looking at this the same way as beef farms. Farmers are open to change if there is a good case for it, not just in response to regulation.
- The FLF feedback on the vision wording was the word ‘value’ was missing. The current attributes in the vision do not add up to value. Another missing element was - is it strong enough on the community, work and employment front? How do we bring this in as it is currently missing and don’t want the vision to look like the affluent are getting richer with no mention of community and the workers.
- There is potential in reframing regulations as the ‘bottom line’ rather than what to aim for. The vision should be the leading conversation and the top-line for what to aim for.



## Decisions and actions

### Decisions made

- An engagement plan was established and members allocated engagements.
- Final vision statement language was revised.

### Actions from 31 January 2019

	Action	Person	Completed by
1	4-10 names who represent sophisticated global consumption trends and to hold a focus group with them to test the vision statement	Steve Smith, Julia Jones, Neil Richardson, John Brakenridge, John Rodwell	21 <sup>st</sup> February
2	Prepare pillar slides for the slide deck	Steve Smith, Neil Richardson, John Brakenridge	15 <sup>th</sup> February
3	List of 10 'inspirational exemplars' for members to draw on at engagements and send to MPI.	All	10 <sup>th</sup> February
4	Communicate revised vision statement text to DesignWorks and commission the video so first cut can be viewed at the Feb 21 meeting.	John Brakenridge	21 <sup>st</sup> February
5	Review the final engagement allocations document	All	15 <sup>th</sup> February
6	Draft summary of meeting for MPI website	MPI	10 <sup>th</sup> February

## Primary Sector Council – proceedings from meeting on 21 February 2019

- The Primary Sector Council's (PSC) tenth meeting was held on 21 February 2019 at Studio ZQ in Christchurch.
- The overall objectives of the meeting were:
  1. Discuss the Taiao workstream
  2. Discuss the National Capability workstream
  3. Discuss Miri's story video
  4. Present the vision with Food and Fibre Sector CEO's
  5. Present to Minister Parker
- Those in attendance were: Lain Jager (Chair), Stephanie Howard, Mark Paine, Neil Richardson, Tony Egan, Julian Raine, John Brakenridge, Julia Jones, John Rodwell and Nigel Woodhead.
- Those not present were: Puawai Wereta, Hayley Hoogendyk, Miriana Stephens, Steve Saunders, Steve Smith, Shanna Hickling and Nadine Tunley.
- MPI officials in attendance: Ben Taylor, Lucie Douma and Libby Rees (full day).
- This document provides a thematic overview of the discussions that occurred.

### Key themes

#### PSC morning session

##### Welcome

- The meeting opened with a brief discussion on thought leadership and governance strategy and the need to achieve strategic convergence. The Primary Sector is facing the biggest change since the 1980's –the difference being that the Primary Sector now faces a different operating environment that extends beyond deregulation to encompass a breadth of complex disruptors. In the 1980s 100% of people's protein was grown/harvested etc. We are now operating in a market where production transcends nature. This is indicative of a fundamental shift taking place.
- The concern with thinking about the current change as parallel to that in the 1980s is that it leads some to think they know what to expect – but there is a need to redefine this change entirely – the Primary Sector isn't a necessary part of the Food and Fibre sector ecosystem like it once was. If the Sector doesn't fundamentally change it could be bypassed.
- Three areas of change:
  1. Markets

2. Consumer preferences, social license
3. Legislative moves, how extreme they might be domestically and internationally (tariff and non-tariff barriers).

A suggested 4<sup>th</sup>

4. Capital and innovation. Leaders never 'lead' innovation change – tech does.
    - There is competitive advantage to be achieved in mobilising capital faster.
- The afternoon session was a non-PSC event, hosted by NZ Merino to facilitate a conversation and also provide an opportunity for the vision presentation and test Miri's video. It was a dry run for presenting the vision to an external audience and an opportunity to gather feedback from Food and Fibre CEO's. Following this Minister Parker arrived and the afternoon's discussions were relayed to him to present the Sector's current thinking.
  - Te Hono bootcamp week of the 21 July provides the timeline for achieving collated feedback from PSC engagement plan – it will be a chance to deliver the overall take-homes and the subsequent finalised vision. Te Hono 2019 may be attended by Minister O'Connor and Minister Parker – their attendance will be important for the convergence of government and sector strategy. The opportunity at Te Hono bootcamp is that senior officials and leaders in the primary sector will talk about change at government level.
  - The conversations about the vision in the next 4-5 months will enable us to get to a design stage and build consensus within the sectors. This can then be built upon at the Te Hono bootcamp together.

#### **Discussion of the Taiao workstream**

- The overall objective of the Taiao workstream is to connect with land managers, providing a framework that supports the PSC vision through the concept of Taiao.
- The workstream subgroup proposed two actions: (see Appendix One)
  1. One pager to connect with farmers and producers, answering the why, what, how of Taiao. This document will be orientated to reflect how farmers see the world, 'speak their language'. (Potential for a longer '2 pager' for other audiences).
  2. Define the 'health' of Taiao. – There is a need to define what 'healthy' means in the Taiao framework for PSC. This needs to remain high level, there is a need for sector engagement on establishing these definitions. The ambitions of NZ inc also need to be considered. These definitions of health would act as an aspirational measure.
- There is a sense that Taiao is developing recognition as a mainstream approach to business, at the grassroots informing a sector wide movement. Failure to lead in this space will soon be a business failing. Taiao as BAU.



- It was considered that it was possible to focus on one thing within the Taiao framework and unintended effects would also see the other elements improved as well so as to position it as less overwhelming. Positive externalities – ie. A water focus with a number of initiatives that would simultaneously reduce other environmental impacts.
- Messaging around the vision was important to ensure stakeholders engaged with it in a constructive way. Positioning the environment as an element of the business process rather than positioned as an outcome it becomes a competitive advantage, value-add to stakeholders. If the environment is positioned as an outcome, external to the value chain, then the strength of the PSC message may be eroded.
- The Taiao workstream informs a part of producers' social license to operate. It's an awareness of the world view of customers - the economic implications of which are huge. The rural-urban divide concern also plays a role in this.
- There is a need to be sensitive to the work already being undertaken in this space - to ensure that this body of work resonates with people who are already doing work towards this end and that they don't feel unappreciated/ignored. PSC work needs to value their 'know how'.
- Also, to appreciate that some farms consider animals as machines and water as a resource free to exploit – these farms will prove to be the greatest challenge to change. PSC work needs to simultaneously reinforce positive behaviours and remove negative ones.
- Timelines for work programme – see Appendix One. Develop a working draft and circulate with PSC before the next meeting (March 27<sup>h</sup>) and revise accordingly. The interconnectedness of all the elements not being lost but looking at them individually to establish definition of 'healthy' first.
- It was highlighted to identify how Ministry for the Environment fits into this space as just as much of a stakeholder as MPI.
- It was identified that there is a need to establish a hierarchy, to enable economic incentive/reward for doing the right thing/improving. For example, Synlait and Miraka are rewarding suppliers of milk that meets certain characteristics and marketing it accordingly. This will change the game and answer the economic incentive question. Other learnings include from Zespri as 'taste price takers' – leveraging a market system that supports economic incentive for value add behaviours.
- There exists a generational dissonance in terms of short/long term vision around creating 'value' and balancing the books. Need to be careful not to lurch from one monoculture to another (i.e. forestry). It is multiple outcomes for multiple stakeholders (MOMS), constantly changing overtime, everyone will interpret the needs differently.

- Farmers are ready – but the market processes don't support them in making change. They need recognition and acknowledgement for making improvements – in the form of economic incentive to encourage behaviour change, what's in it for them otherwise. Processors need to reward farmer behaviour change – we need to push market change.
- MPI raised the question of how far into the detail of the Taiao conversation the PSC should go. It was concluded that the risk of going too far before the next meeting was small so will come back to this.

### **Discussion of the national capability workstream**

- Capability management requires coordination – it's about effective management more than money in this space/context. See Appendix Two for the challenges presented to the discussion. The underlying objective of optimising Primary Sector capability is delivering decreased environmental impacts with equal or better return on investment.
- The Sector's current approach is securing a 'safe pair of hands' at the individual worker level, rather than at an education systems, pan sector level. Skills are developed on-farm with a narrow focus that means at the sector level capability is not being developed.
- Business management is critical to future success, yet it is not currently held up as such and seems to be considered secondary to other skill sets in the sector. – see Appendix Two for supporting data. The numeracy and literacy statistics are of particular concern. Farmers do not appear to value skills efficiently or effectively. This is a big impediment that could be mitigated with alignment on strategy.
- The Primary Sector also has a shocking track record around work safety – a perception that needs to be addressed to attract capability to the industry.
- It was raised that design and marketing as capability area was missing from the list of science and education.

### *New Zealand Skills Institute*

- Proposed by Minister Hipkins – the New Zealand Skills Institute would be a unified, coordinated, national system of vocational education and training.
- The impact of this could be significant for the national primary sector capability – as long as its producing skills that are actually needed by the sector. The idea being that it will eliminate unproductive competition (this is however problematic if this removes any responsibility to be answerable to industry) – in light of a period of a number of institutions struggling or closing entirely. The stakes are high – proposed it needs to be at the TEC level.
- Looking at the NZ young farmers model – the skills they're focusing in on at competition – need to scale this up.

- It was asked if it is a demand or supply side issue - The demand side is the biggest problem, but supply and quality is also a problem. There is a need to stimulate demand in this space – to have students leaving school and interested in developing a skill set for fulfilling careers in the primary sector. If people can see the career potential they will come.
- Education system needs to be outcomes focused, not ‘bums on seats’ philosophy that plagues tertiary education business models now.
- There was convergence of group around the proposal presented but acknowledgement that it requires significant political capital – acceptance/acknowledgement that the sector created the education vacuum – but is it on strategy to address this now? We need to get people to agree why we need this for the primary sector – prove why it’s critical. Then, consider what to do about it.
- Recommendations and submissions due to government by March 27<sup>th</sup>.
- The group concluded that the current National Capability slide deck have a couple of slides that include the PSC’s agreement/support and PSC suggested next steps.
  - PSC in agreement with ‘recommendations to govt slide’ – only concern was raised around funding not being done through a leadership group.
  - Is there any low hanging fruit or middle ground that can be achieved now, to start working with industry on education.

### **Leadership Group discussion**

- A leadership gap in the primary sector needs to be addressed and one consideration needs to be the make-up of this group. It should include international, local, tech people that would form a group responsible for delivering on the vision.
- There was a question raised as to who would write the terms of reference for the leadership group. This could sit with the PSC.
- PSC to brief the FLF in the afternoon who can elevate to Prime Minister.

### **Discussion of DesignWorks Miri’s story video**

- Miri’s story presented to the PSC for the first time in video form. Developed by external group – designworks.
- Discussion ensued around whether the videos (Miri and original one) were PSC property or an extension of PSC messaging. Consensus that these videos are not currently fit for purpose.

### **Afternoon session – joined by Food and Fibre Sector CEOs**

- The overall sense from the room was a collective want to answer ‘how do we achieve this and is that at a pan sector level?’ The group were largely in agreement on the scale of change that’s required. The group also agreed that the sooner the better, and accepted that it might be ‘painful’. s 9(2)(ba)(i), s 9(2)(g)(i)

what is it that needs to be done? What is it we are going to do now?  
How?

- The group felt also that the leadership should come from the collective 'us' as industry leaders, working with government - but it shouldn't be under estimate that the industry is moving toward efforts already.
- Some felt it important to acknowledge that there is a difference between acknowledgement of change and willingness to change. This difference would prove a challenge to collective action.
- The industry representatives highlighted that there exists a fundamental difference between producers and government around 'wealth protection' (industry) versus 'wealth creation over time' (government).
- Consumers need to be part of the change equation, consumers need to be the ones to drive this – the evolution of NZ's Food and Fibre sectors. This will help to drive value creation of existing products and get a premium for them.

**A facilitated session saw the group break into three to answer three questions -**

*What should PSC's engagement with the industry look like?*

- 1<sup>st</sup> Awareness of PSC's work, let industry know where the PSC is at with their thinking and reaffirm that hearing their feedback is important. Start with Beef + Lamb, Federated Farmers, MIA, HortNZ etc.
- Collect their feedback at this stage, tap into their knowledge of their organisation and board, how they might react and the best way to communicate to that specific company.
- 2<sup>nd</sup> Collect feedback from individual company CEOs – selecting the ones who are most likely to engage first.
- 3<sup>rd</sup> The PSC and CEO approach company boards with a solutions orientated approach, with much more how rhetoric, not just the vision.
- 4<sup>th</sup> Collaboration – to develop a plan of action. Form coalitions of the willing, this will disincentives not partaking.
- Being sure throughout this process to acknowledge efforts made by each 'stakeholder' along the way if they already doing things.

*Can our primary sector configure itself to give high quality advice to Government? (What does it look like?)*

- The group working on this question re-worded – How might we configure our primary sector to have a partnership with industry and government? This would require redefining the perception of the public service, not as policing policy but as partners in strategy. A pan sector policy shop was suggested. The willingness of the current government to engage was noted as a real positive. A need for greater information around for example the inclusion of agriculture in the ETS would be important.

### *Message to the Minister*

- The group was largely in support of the need and willingness to change. Accepting that the industry will need to make harder calls, rather than be laggards. The change needs to take place at a whole systems level and avoid lurching from one monoculture to another. This systems level approach would be informed by Taiao. It will not be a linear process.
- There was significant discussion around the industry's 'need' for protection. Some felt that the industry didn't need any protections, provided the regulatory levers employed were based on solid evidence. Also that active participation in the process would avoid unintended outcomes. Additionally, industry need for greater depth of data and facts for future decision making. Need a belief in market forces, internalise the externalities.
- The group agreed that it was up to business and market to realise value-add but that this also requires an environment that incentivises risk to optimise value potential. Leverage the value chain to drive genuinely sustainable practices.
- We're facing unfair global markets that receive significant protection still. We are already relatively unprotected. There is market opportunity here but this needs assessment.
- When taxes are being proposed the industry should be able to critically analyse them, where is the tax revenue going for example – what is the intended purpose of the tax. Will this just simply be passed to consumers and be reflected in increased prices.
- Industry is very keen to engage, knowing that a failure to do so will result in government regulation that is less optimal for the Primary Sector.
- The changes of the 1980s only saw the exit of 3% of the industry when 11% was predicted, this is a positive indicator for this new period of change.
- The science behind for example GHG tax – need to be clear and whether the implementation of certain measures will realise desired behavioural change.
- Industry are willing to own the problem and invest significant effort to fix it. The Minister and policy assistance is needed to stop blocks to change.

### **Minister Parker's speech**

- Minister Parker alluded to the trade shifts that are required.
- Parker said that what drives his agenda is that the world has serious environmental challenges and NZ has many advantages with its natural capital and this needs to be protected.
- Nothing happens without leadership – there will be no change without leadership.
- We will create brand value from our environmental values – this will extract the value and we can push this to trade, this is complex and also interlinks with capital markets and banks.

## Decisions and actions

### Actions from 21 February 2019

	Action	Person	Completed by
1	Engage with the primary sectors on the vision	Everyone	15 <sup>th</sup> July
2	Draft the proceedings and summary of meeting for MPI website	MPI	15 <sup>th</sup> March

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# taiao

Progress Report - February 21 2019



## Taiao Well-being Framework

Rangi ora  
Whenua ora  
Wai ora  
Whanau ora



Healthy Air  
Healthy land  
Healthy water  
Healthy communities

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# Making Taiao Real

For **taiao** to be a real, motivating and transformative force for farmers and producers we need to earth it



## 1 page to connect with farmers, producers

- We want to invite farmers and producers to join a movement that is necessary, urgent, ambitious, transformative and enriching
- A fundamental tool to engage with them is a simple explanation of the why, what and how of Taiao:
  - What we mean by Taiao
  - Why it is needed; the urgency of embarking on the journey together (a changing world: environment/natural resources at tipping point; heightened, growing consumer expectations for environmentally benign products; competition from products with lower environmental footprint)
  - What it means for farmers and producers, and their businesses and the decisions they will make tomorrow and the day after

# Delivery

- Drafting by Working Group > **March 15**
- Bring to PSC for input **before March 27** meeting
- Finalise April

## Pillars of taiao

**Climate change**  
■ High proportion of GHG emissions from agriculture and pastoral farming in particular

**Soil**  
■ Health; richness; Loss of topsoil  
■ Inappropriate use of versatile soils

**Contaminants**  
■ Waste: Plastic  
■ Synthetic chemical residues



**Freshwater and oceans**  
Quality; quantity; habitat  
■ Degradation from land use (nitrogen; phosphorous; sedimentation; *e coli*; freshwater species decline)  
■ Wetlands loss  
■ Over allocation

**Biodiversity**  
■ Habitat loss  
■ Species decline and extinction (especially lowlands)  
■ Pollinator security

**Animal Welfare**

**People and Communities**  
• Health and safety  
• Employment Conditions  
• Education and Opportunity  
• Community Engagement

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## 2. Defining Health of Taiao

- Health/wellbeing is central to Taiao; but lacks definition
- **Defining what we mean by healthy** across the pillars will help identify the level of aspiration, practice change and transformation required, and the opportunities and challenges ahead
- It will provide:
  - A **tool** to engage with sectors to tackle difficult issues that require whole-of-sector and/or cross-sector agreement to deliver (co-development; new ways of working)
  - A **basis** from which to identify what actions might be required to achieve Taiao

## Method/Process

- Start with one pillar – Land:Whenua - to **prototype** the process
- Identify the **defining features of land** for food and fibre (e.g., soil; land use)
- Develop **template**
  - Where appropriate use established measures for health
  - Quantitative-Qualitative
  - Consider value of a band where (ambitious) 'good' performance is the floor of healthy, while exemplary is where producers/sectors would likely need to be to be world-leading
- Note: we can be clear where there is doubt or uncertainty as to what healthy looks like and use this as a tool to engage with sectors and identify what might be needed to move to clarity.

## Work programme

→ March 1

Set template for **land:whenua** pillar

Identify **key features** of land for food and fibre

**March 1-March 15**

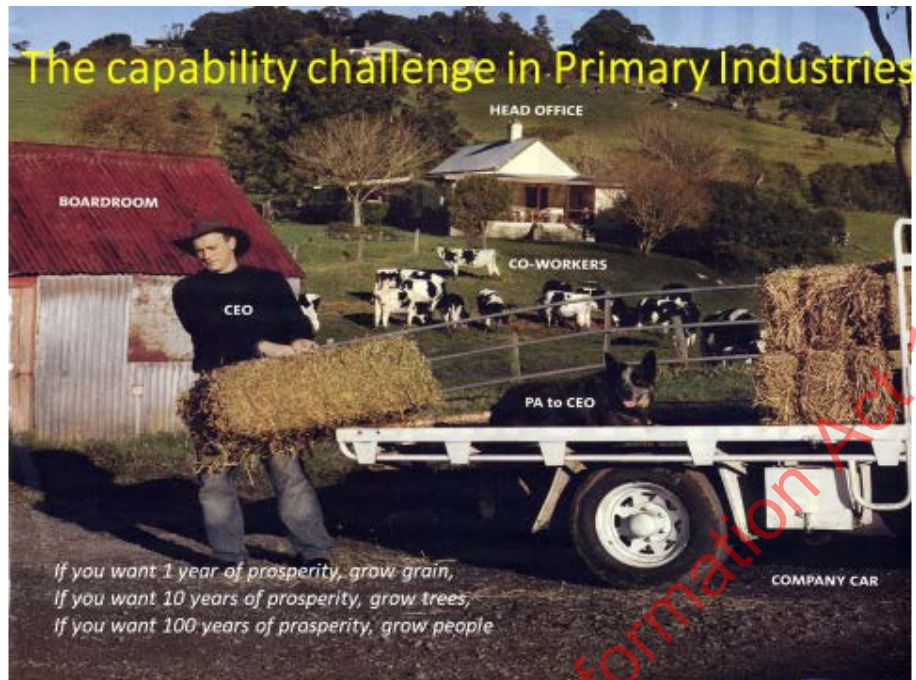
Full working draft of healthy land:whenua pillar

→ March 22

Circulate to all PSC for comment/input

> Working group review to inform next pillar

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## Overview

- Key messages
- Current situation + opportunities
- A proposal
- recommendations

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## Key messages

- Capability management requires coordination:
  - Markets
  - Farming Systems
  - Research & Education Institutions
- Most of the elements for an effective strategy exist
- Scale and effective partnership are essential

What are the capability implications of the current situation?

- NZ food and fibre has potential to significantly increase export returns
- Environmental Sustainability is the issue of our time
  - Risks and farming conditions:
    - Reputation; Extreme weather events; Pest, disease and biosecurity risks
  - The requirement to farm within the environmental envelope:
    - Water use and quality; Emissions: HBiodiversity;;Soils

### Capability challenges

- Opportunity 1: high value depends on high skill
- Opportunity 2: viable environmental sustainability depends on high skill
- Opportunity 3: effective utilisation of new technology depends on high skill

Opportunity 1: high value depends on high skill



Opportunity 2: viable environmental sustainability depends on high skill



Guyton's: 11.9% ROA + 28kg/N Leached

Central Plateau Average: 5.5% ROA + 39kg/N Leached

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Opportunity 3: effective utilisation of high technology depends on high skill

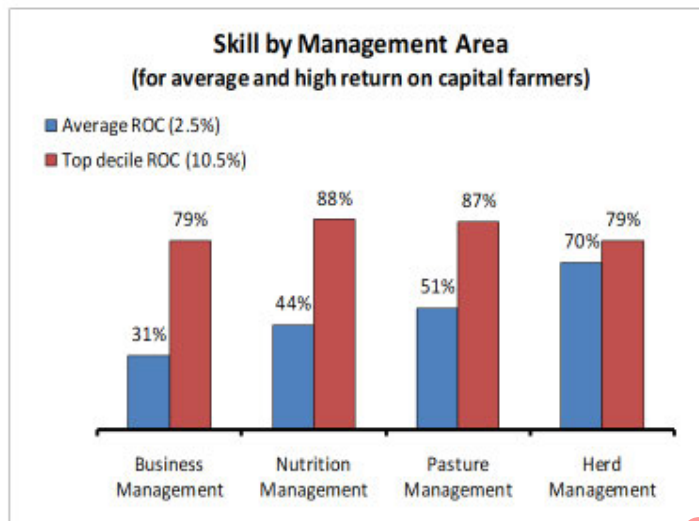


Opportunity 3: effective utilisation of high technology depends on high skill



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We can quantify the benefits: the Tasmanian Approach



We can monitor progress: the PICA Approach



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# What will it take to get there?

## Farm and value chain

- Attracting the right people
- Clear progression pathways
- Fit for purpose training
- Great employment practices
- Safe working conditions

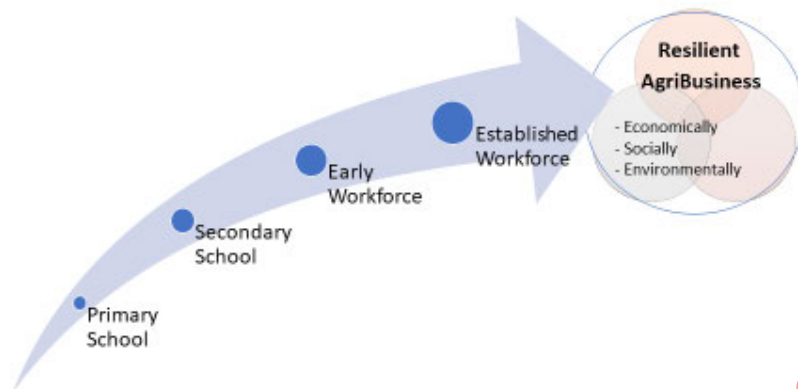
## Science + education

- Fit for purpose RST + commercialisation system:
- Aligned + responsive education and training system
- Fully engaged private sector working in effective partnership with government

Do we need a total overhaul?



## The Leadership Pipeline



## A Progression Pathway

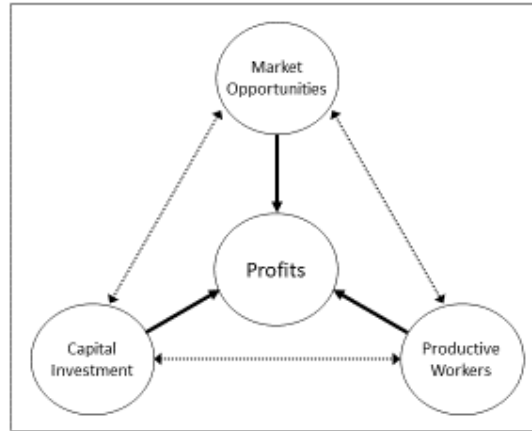
TeenAg: fun, rewarding and challenging to students



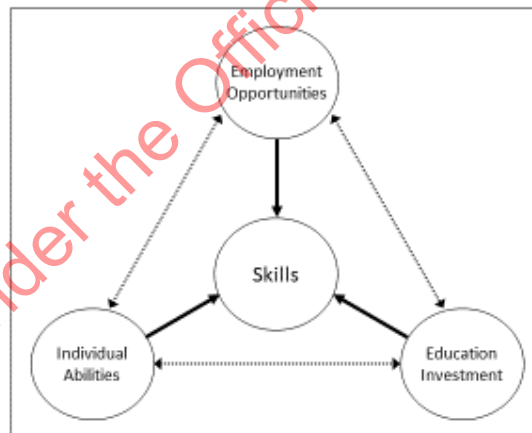
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# How to construct a solution: The Perspective of Employers

Prof. Paul Dalziel

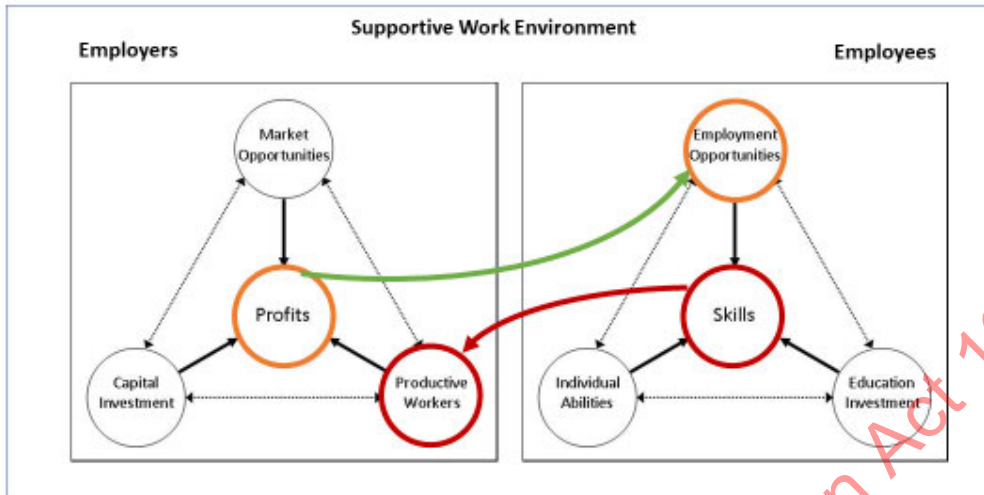


# The Perspective of Employees



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# The Synthesis



## Conclusions

1. Capability underpins economic development
2. Networks create demand
3. Value + balance formal and informal learning to grow capability
4. Talent is retained through growth opportunities
5. Workforce planning to manage volatility – growing talent pool



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## Implications for the education and science system

- Core elements of programme established
- High dependence on partnerships to perform
- Gearing up for sustainable change

## Recommendations to Government

- Independent 'Transformation' Taskforce reporting to [redacted] + 'Top Group'
  - Determine scale and pace of change
  - Agree on benefits
  - Design equitable co-investment framework
- Multi-agency coordination
  - MPI lead
  - MPI; MBIE; TEC with support from Treasury + MoE + MfE
- Co-investment/ co-governance approach
  - Industry: determine needs and quality
  - Providers: deliver in response to needs and quality standards
  - Govt agencies: co-invest and co-govern

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## Primary Sector Council – proceedings from meeting on 29 April 2019

1. The Primary Sector Council's (PSC) eleventh meeting was held on 29 April 2019 at MPI in Wellington.
2. The overall objectives of the meeting were:
  1. Discuss the primary sector ecosystem
  2. Session on understanding the concept of Taiao
  3. Update from the Taiao subgroup
  4. Discussion on marketing NZ's cuisine
  5. Feedback on the vision engagement
3. Those in attendance were: Lain Jager (Chair), Stephanie Howard, Neil Richardson, Tony Egan, Julian Raine, Miriana Stephens, Nadine Tunely, John Rodwell, Steve Smith and Steve Saunders.
4. Those not present were: Puawai Wereta, John Brakenridge, Julia Jones, Nigel Woodhead and Mark Paine.
5. MPI officials in attendance: Ben Taylor and Lucie Douma (full day).
6. This document provides a thematic overview of the discussions that occurred.

### Key themes

#### Minister O'Connor visit to Primary Sector Council

- Minister Damien O'Connor was at MPI and stopped by the Primary Sector Council meeting to emphasize the importance of the work they are doing and how he was aiming to attend Te Hono in July.

#### Discussion of primary sector eco-system

- A proposal of how a leadership group within the Primary Sectors could work was circulated. There is a request for feedback on this document. Comments made in relation to the proposed eco-system approach included:
  - The Irish Board Bia strategy has a context section in the beginning of their strategy that could be used as a base to paint and understand the context.
  - There was concern that we need to revisit the ecosystem slide deck and confirm that everyone agrees with the slides.
  - There was acknowledgement that farmers are fearful for the money and capability required and that they may not have the capability to change.

- The vision wording and strategy to be designed underneath cannot put a specific quantity on the change that is required – this will be too specific and there is a risk that it will fail, therefore better to agree to a change that is required.
- The ecosystem slide deck included a slide on the 10 hard to answer questions that there is no current consensus on within the primary sectors. The following discussion and feedback took place:
  - It was acknowledged that globally we are unlikely to meet our climate targets under the Paris Agreement.
  - We need policy clarity on the hard to answer questions.
  - Strategic clarity is critical to our ability to manage the transition well
  - The banking sector is questioning how much it will cost for farmers to transition (estimate as \$5b) – for unsustainable farming operations this is a big question and problem.
  - Banks may not be willing to fund the required transition unless they see a bankable future, again strategic clarity is important
  - There has been progress made with carbon – i.e. Carbon zero; is this not the start to the change that is required?
  - It's not that we aren't moving forward; we are but it is happening in an ad-hoc way; no overall plan. This will mean farmers are continually pressured to meet new requirements. Without an overall vision and plan for the Food and Fibre sector – farmers will then undermine and it will be difficult to get traction.
  - Some processors want ETS at farm level.
  - It was agreed that we need buy-in to the end state/the outcome want to achieve. Not debate every point along the way (i.e. the climate science points) – we need to take a long-term view. We agree with what the future may look like and then get a group that leads us through that change.
  - There is urgency to get a group together and to get us on the same page, in the same direction.
  - Are we going to move industries – we can't move industries from within an industry so how do we do this without destroying it?
  - Government needs to step up for who will do work to create the future farming transition.
  - As there is no immediate crisis it is hard to push for change.
  - Can we get the Senior Leadership Teams to walk through the door and agree on a pan-sector vision. We need to get industry over the line. Get the eco-system in place and high level vision is aimed to be ready for July.
  - Need to get the future vision to accept the past problems we have had.
  - Leadership is fundamentally the cornerstone of the new entity.

**Taiao – s 9(2)(a)**

- Where is the NZ story internationally, given context on Taiao? There is agreement that we need to align these.
- There is an NZ story and it is dual story including Maori and Pakeha – we need to create a dual story within the primary sectors also; not just use the Maori story.

### ***Taiao philosophy***

- Maori describe the river, mountain and place of being is very important and core to the relationship with the environment.
- Part of contribution to environment is foregoing self (to an extent). There is deep respect and relationship with the environment in the Maori culture.
- In Maori philosophy humans are very down the chain; we are not the boss, the birds are, this creates an entirely different relationship.
- The elders have a sense of the past and the relationship with nature; what about the young. It's culturalism and get kids to reconnect to past and the nature.
- Maori have the concept of kaitiakitanga and this resonates with NZ; people need to know where it comes from and the essence, this is how it is mainstreamed and loses Maori voice and brings resentment.
- Kaitiakitanga is connected to everything in the triangle – this is essential in the vision that we don't just limit the meaning of Taiao. It is not just stewardship – it is much deeper than that.

### ***How Taiao can fit into vision***

- People find it difficult to change because people revert back to the agendas.
- Iwi chairs forum has gone and consulted on the all encompassing principles, this would be good to look at
- Councils are where the rubber hits the road, not central government.
- Potential to create a dual approach, true partnership with Maori and Pakeha should be 50/50 voice.
- The one thing that could change this country is water; however this isn't good enough because we have a global crisis. Even the Maori community is difficult to understand and make change for carbon emissions as it is not something can see whereas water, can visibly see when the river is unwell.
- Biggest issue in Maori community is water because it is what people know (they can see it and feel it) and can use as gateway to climate change.
- By doing this and making carbon invisible, this is not ideal – but people can't see it. Including Maori.
- We need a trigger point to enact change – start with water (which is visibly bad) and then go further to LUC etc. – we need a thinking change.
- What is the carbon profile of meat vs. plant; not dairy here vs. dairy in other countries
- s 9(2)(ba)(i), s 9(2)(g)(i)
- An important related focus is our commitment to honouring the genuine partnership inherent in Te Tiriti o Waitangi.
- How do we get Kaitiakitanga in it's whole? How engage with Maori? Do it for the lifespan of the vision, Kaitiakitanga is a relationship.

- Don't drive timelines with iwi – shows just a tick in the box, we need to create an enduring long-lasting relationship.
- We are at risk of taking concepts out because we do not understand them or have the work. We want to use concepts but we cannot use them in the way we currently are.
- Create an enabler; these concepts have merit and potential. This is why partnership is so important with Maori. Action: Go to small group of people to get enabler, ie engage s 9(2)(a) to assist with Taiao framing.
- Genuine belief in the Taiao concept now how do we integrate the values of the concept into the vision. Don't want to shy away from using Taiao but we need to be careful to build respect and true partnership with Iwi.
- It's not a word it's a concept and value – need to change the structure of the vision to something like 'embrace philosophy of Taiao'.
- Can we get to the point where the farming community can understand it.

**How does this fit into the wider ecosystem/policy leadership group?**

- s 9(2)(ba)(i), s 9(2)(g)(i)
- Maori need to be on leadership committee.
- On this committee 3 components are required:
  1. Need Maori representation
  2. Consideration to how decisions affect the treaty partner
  3. Are the solutions implementable
- Top sector group in the Netherlands has 100ish people and have a select committee who deliver on it, so we could structure ourselves in a wide group and small top committee that delivers, we have many people in NZ that have ability to be on this leadership group.
- s 9(2)(ba)(i), s 9(2)(g)(i)
- Speed that active consumers are growing is fast; not just changing environment, but products that are developed within that environment.
- Standard of living should be a key consideration into why we are doing this.
- We are unique in world where Primary Sectors and tourism share same resources.
- Given our exporting figures we are very exposed to global consumer movements.
- Trying to get NZ back on top 10 of wellbeing/living standards and do this by transforming the primary sectors.
- Can't do this, Maori words take out of vision as they are the operating modes.
- s 9(2)(ba)(i), s 9(2)(g)(i)
- Our purpose sits within broader vision for NZ and mission includes; sovereignty and Maori philosophies.
- Principles are building blocks to achieve outcomes wanted around the room.
- How do we design entity and ecosystem to deliver on this and the operating principles.
- Need sufficient clarity of vision to enable a pan-sector ecosystem with partnership ecosystem to deliver. This should be done in July at Te Hono Bootcamp.

## Taiao session – Stephanie Howard

- Taiao can mean all things to all people.
- Going through the 10 principles – doing the right thing for mokopuna is hard to articulate, prosperity needs to include commercial viability and a sense of well-being. It was agreed that it needs to include that what we are doing is genuine.
- There is no mention of a science based understanding within Taiao.
- It was questioned why urban was not included in the centre green interlinking circle as part of the Taiao framework. The response was that the circles currently include healthy farms, rural and export communities and this could be expanded to 'healthy NZ and business' – the wording now is so focused on farms and their communities but could be applied to other audiences. Inner circles should be economy not 'communities'
- Each principle for Taiao will include on-farm questions.
- Possibly we could frame Taiao as 'where we fit into Taiao' – this will use Taiao as a principle and not a noun. Using 'inspired' allows participation in a conversation to discuss outcomes, well-being framework inspired by Taiao.
- Need to have an acknowledgement that Taiao is Maori – the partnership/collaborative approach is missing.
- 5 intergenerational outcomes; Taiao is just one of them. This is an intergenerational method.
- We need to say this is about our people and sovereignty. Taiao for New Zealand – this resonates with who we are and it is us these principles are aimed at. Sovereignty will bring it to a different level.
- This is the hostility for the farming community because there is no support structure – need the conversation of 'here are the tools that will help to address the change'.
- The vision is easy to buy-in to and it is where the capital comes from. Articulation of principles will be higher; rather than at farm-level.
- Taiao needs to lead to outcomes want to achieve – Steph to meet with Treasury on their well-being framework.

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## Decisions and actions

### Actions from 29 April 2019

	Action	Person	Completed by
1	Provide feedback to Lain Jager on the ecosystem of the primary sector, and why a leadership group is required.	Everyone	30 <sup>th</sup> May
2	Doodle poll to plan future PSC meetings	Lucie Douma	10 <sup>th</sup> May
3	Taiao sub-group to meet and discuss where to from here	Stephanie Howard	31 <sup>st</sup> May
4	Meet with chefs and experts to discuss what could be done in the NZ Cuisine space	Steve Smith	1 <sup>st</sup> June
5	Summarise and consolidate primary sector engagement	MPI	19 <sup>th</sup> June
6	Complete PSC engagement with stakeholders	Everyone	15 <sup>th</sup> July

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## **Primary Sector Council – proceedings from meeting on 19-20 June 2019**

The Primary Sector Council's (PSC) twelfth meeting was held on 19-20 June 2019 at Studio ZQ in Christchurch.

Attendees: Both days - Lain Jager (Chair), Stephanie Howard, Julian Raine, Miriana Stephens, John Rodwell, Steve Smith, John Brakenridge, Julia Jones and Nigel Woodhead. 19 June only - Tony Egan, Nadine Tunely, and Mark Paine.

Not present: Neil Richardson, Puawai Wereta and Steve Saunders.

MPI officials in attendance: Ben Taylor and Libby Rees (both days).

The overall objectives of the meeting were:

- Discuss the progress of Taiao work stream
- Review and consider industry feedback on vision
- Finalise the vision wording
- Develop recommendations
- Update on freshwater reforms

### **Key Themes – 19 June**

#### **Taiao**

- Taiao – presents a journey of transformation for the Food & Fibre sector.
- Te Mana o Te Taiao
  1. 'The first right goes to the environment'.
  2. Reflects the original slide deck's presentation of ecology as the most important circle that sustains everything else.
  3. Operating within environmental limitations/constraints.
  4. Environmental limits act as the ultimate regulator.
- A Taiao based approach to land use decision making presents interesting questions in the space of economic return versus social return (community consequences), sovereignty and biodiversity. Necessitates an integrated approach.
- Taiao accreditation scheme proposed, that would have aspirational standards to encourage behaviour change, act like an assurance scheme potentially. The bottom end needs to be regulated and exemplary behaviour encouraged by a scheme.



1. On-farm environmental planning.
2. Catchment planning.
3. Fit for purpose measurement systems – ie. nitrate sensors, review of overseers – to support on-farm practices, provide data for decision making.

### **Vision wording**

A revised vision 'one pager' was presented that, reflecting the feedback from the industry, reframed the vision into a vision statement, mission statement, and values. This was further supported by a section entitled 'what are we going to do' that tells a wider narrative to support the aspirational statements.

- Tourism NZ's *Enrich New Zealand* mission statement was introduced to the meeting, with Tourism NZ's blessing for the Council to use this language.
- While it was agreed that a tagline is essential, consensus was not reached on the use of the exact language. It was however acknowledged that an alignment with Tourism NZ has notable benefits.
- Following from the morning's discussions on Taiao it was felt that more emphasis on the concept in the vision was needed – integrate wording *Te Mana o Te Taiao*.
- Vision wording specific comments were taken from the group and recorded for use on vision finalisation work to be in the lead up to Te Hono.

### *Key points:*

- 'Prosperous' implies private wealth rather than collective – need to be clearer in our messaging, where 'enriched' future might work.
- Kaitiaki – you can only be kaitiaki if you are tangata whenua, Māori. Suggestion to use guardian instead of kaitiaki.
- Keep values section in, in principle.
- The use of Taiao not at risk in the same way.
- How we're going to do it will become one of the strategic pillars (measurable).
- It was felt that the vision passed two tests:
  - Effectively communicates to audience of required systems change.

- Ensures endurance.
- There was consensus around the vision in principle and acknowledgement of some further wordsmithing required.

### **Recommendations**

- The group agreed in principle to develop a series of recommendations for the Minister under four key areas:
  - Sovereignty
  - Economic
  - Eco-system
  - Environment
- The group discussed the need for pan sector policy approach to be much more unified.
- A need for measurable levels and support for measuring tools and practices based on the notion that data is a credible decision making tool.
- Concern was raised around the protection of intellectual property and governance, particularly around the preservation of the tikanga concept of Taiao.

### **Key Themes - 20 June**

#### **Essential Freshwater Reforms**

- John Penno, Chair of Freshwater Leaders Group presented to the group on work to date and what is coming up.

#### **Ecosystem**

- 'Top Group' design
  1. Looking to examples, Ireland and the Netherlands come at it from different approaches. Need a uniquely New Zealand solution.
  2. A national commitment to Taiao underpinned and championed by the Food and Fibre sector, based on the PSC vision.
  3. Ability of such a group to effectively serve the NZ Food and Fibre Sector rest entirely in the design.

4. There are urgent issues that there isn't a unified approach to and a pan sector body may be the answer to unifying the sectors' voices on these issues.
  5. There is a need to know what the design looks like and what it will deliver. Is it more than a policy shop. Sufficiently distanced from Government and industry.
  6. Who is it answerable to
    - a. PSC vision, underpinned by Taiao
    - b. Reserve power
  7. Connect with the commissioner for the environment.
- 'Top group' funding
    1. Who pays for this? How is it funded?
    2. Productivity commission size > \$5mil.  
  
Current funding levels:
      - a. \$130 mil collected in levy's collected annually
      - b. \$300 mill on science applied to F & F sector
    3. Commodity levy structure – individual right to choose where levy goes. The government could match levy inputs \$1:\$1.
    4. Funding structure is critical to maintaining the organisations ability to perform pan sector leadership.
  - Governance structure
    1. Needs diversity. Have to be careful about the group not being a representational body, one of the directors being the Environment commissioner for example. Taiao governance.
    2. Suggestion that six directors should be five and the chair should have a business background.
    3. Appointment is hard because 'policy' is particular interest area that people might not be interested in.

## Recommendations

- a. Sovereignty

Group felt a recommendation round sovereignty was necessary and Lain would work with Julia to further develop this to bring to the group in the coming weeks for comment.

b. Taiao/Environment

The group was unanimous in its support of recommendations around Taiao and the environment in principle. Lain and Steph will write and circulate to the group for comment 3-5 recommendations in the coming weeks.

c. Economic

The group supported economic recommendations that aligned with achieving 2% growth and recommendations for supporting fair transitions for farmers (social economic impacts) Noting that people and fair are two different things.

**Meeting closed 3:00pm, Thursday 20 July 2019**

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## Decisions and actions

## Actions from 29 April 2019

	Action	Person	Completed by
1	Apply latest Taiao work to the final vision statement	Steve Smith and Miriana Stephens	12 July 2019
2	Co-develop and draft a recommendation around the issue of sovereignty	Lain Jager and Julia Jones	12 July 2019
3	Co-develop and draft 3-5 recommendations around Taiao/ environment	Lain Jager and Stephanie Howard	12 July 2019
4	Co-develop and draft a recommendation around ecosystem and growth	Lain Jager and Steve Smith	12 July 2019
5	<p>Reflect the comments recorded on <i>What does success look like...</i> slide of ecosystem PowerPoint:</p> <ul style="list-style-type: none"> <li>• Sustainable enterprises (so that people understand the financial element)</li> <li>• Modern, regenerative farming systems rather than 'sustainable farming...'</li> </ul>	Lain Jager	12 July 2019

## **Primary Sector Council – proceedings from meeting on 13 August 2019**

The Primary Sector Council's (PSC) thirteenth meeting was held on 13 August 2019 in Wellington.

Attendees: Lain Jager (Chair), Miriana Stephens, Stephanie Howard, Tony Egan, Julia Jones, Julian Raine, Nadine Tunley, Neil Richardson, John Rodwell, Steve Saunders, Nigel Woodhead, John Brakenridge.

Not present: Puawai Wereta, Steve Smith, Mark Paine.

MPI officials in attendance: Ben Taylor, Lucie Douma, Charlotte Cawthorne, Rachel Carruthers, Karl Yager.

The overall objectives of the meeting were:

- Feedback from Te Hono
- Discuss what's next post Te Hono
- Finalise the vision
- Update on Taiao
- Develop the PSC roadmap contents
- Climate change considerations

### **Key Themes**

#### **Feedback from Te Hono and What Next**

- Te Hono was well attended by Government, industry and business. The Taiao concept was communicated by Miriana and strongly supported as the heart of the vision. Steve's vision took on the view of all attendees. Lain presented the ecosystem concept at Te Hono and this has become an ongoing discussion.
- There was an overall unified view for the importance of transformation, connections, and personal commitments made to work in partnership by those in attendance, sparked by the vision, and the emotional connection with the Taiao concept. This needs to be developed into working relationships. There is a feeling that everyone is ready for change now. How this transformational pathway looks and works is important for making the transformation required happen.
- A leadership group is needed to keep the vision alive, keep the leaders committed to it, and keep up the momentum. The PSC needs to drive the change and articulate what success looks like.

- Neil presented a one pager that frames the Vision in business speak, and underlined the importance of tailoring the message to those you are delivering to.
- There was general agreement to the one-pager which outlined 5 fundamental things the Government and Industry need to sign up to, and that there is a transformational change required (not incremental), such as a restructuring of the RS&I sector, in order to meet the urgent demands we face. This will require new technology and ideas. The question is how? We need the industries to change (and be on board for the change).
- There is a need for a framework that businesses can overlay in order to understand how and what they need to change as the 'why' is already known and general agreed to. However, there is a lack of technology available to enable businesses to change, e.g. to enable carbon-zero farming. This may require a realignment of how money is assigned to the RS&I sector to focus on the most urgent issues.
- Some design questions that were discussed include:
  - What are the 2 or 3 key functions required from the RS&I sector in the next 10 years?
  - Carbon neutral farming?
  - Is it suitable to put up an X Prize of \$100 million global prize for designing particular solutions?

### **Finalising the Vision**

- Steve Smith called in to finalise the vision wording.
- It was agreed that "modern regenerative" should be used as it is seen as solutions based, sounds more biological (and farmers can relate to it), and is currently already gaining momentum.
- It was agreed that 'low carbon emissions society' should be used rather than 'greenhouse gases'.
- A point was raised that most people will understand many of principles of the vision, it's the HOW they want to know so they can plan their future. This also means there is a need for metrics so people can manage.
- There is pressure to present the vision soon to maintain the positive momentum from Te Hono.



- Engagement with the broader Maori community is required.
- It was agreed that the vision was final from this point forward.


### Update on Taiao

- Stephanie and Miriana provided an overview of the reception of Taiao at Te Hono. The approach of people, environment and economy was understood. The philosophy was well received from the Maori cohort, but wider consultation from the community and especially Maori is needed.
- Before release, there is a need to provide sufficient detail for understanding on what Taiao means at the farm level, catchment level, and the Whole System, how this will be measured, and who the permanent custodians for Taiao will be. Ownership of Taiao needed to be with an authoritative body.
- The PSC Taiao group need to hold further workshops, seek out further engagement with Iwi and sector, and establish 2-3 strategic outcomes, and immediate deliverables.

### PSC Roadmap

- There was discussion that a leadership group should be able to provide independent policy advice from government. An ecosystem based approach developed by MPI was discussed. This ecosystem has two key groups in it, the Food and Fibre Reference Group and the Challengers Group.
- F&F Reference Group would be made up of the key industry leaders, MPI, MBIE, MFE, and Iwi Reps. Challengers Group would provide challenge to the Reference Group. Acceleration Unit would be resourced with \$1 million to support the groups and drive strategy to achieve the vision.
- There was discussion about where youth would sit within this ecosystem model.
- Concern that allowing the Reference Group to lead will not provide the transformative changes required. Therefore, the setting up of the structure of the leadership should be done on best practice.
- The PSC needs to decide on how they see the new structure working, in particular what the groups do and who would sit on each of the groups.

**Climate Change Considerations**

- Simon Terry from the Sustainability Council outlined the positioning for agriculture on the Zero Carbon Bill and ETS and suggested that it could be time for the PSC to get involved.
- The market demand for carbon neutral is coming with purchasers demanding at a product-by-product level. Therefore, there is a need to get ahead of the game now, or miss the boat.
- The current plan of a 95% rebate is effectively no change in emissions produced, but has a large distributional impact; if we cannot cut agricultural emissions by more than 5% to meet Paris Agreement, then other sectors will have to cut their emissions by multiple times that amount.
- There is a need for domestic offsetting capability - NZ has minimal offset capacity now and none from 2021. If NZ primary producers want to step out tomorrow and prove their carbon neutrality, they will need to go offshore for the credits to do it. There is a need for permanence (i.e. forests will still be around in 100+ years) of offsetting to give integrity to units.
- What we're doing on NZ farms is to benefit consumers on the other side of the world; they are benefitting from the NZ emissions - should cost of offsetting change to one of consumption accounting? Not an issue that will go away, because developing world as mass exporters are keen for that.
- s 9(2)(ba)(i), s 9(2)(g)(i) 
- These are issues that New Zealand needs to think carefully about.

**Actions from 13 August 2019**

Reference	Action	Responsibility	Notes
1	Taiao planning meeting	MPI/Stephanie Howard	A meeting is currently being planned for 21 <sup>st</sup> August.
2	Finalisation of vision	Steve Smith	
3	Eco-system discussion and advancement	Neil Richardson	A meeting is planned between a subset of PSC members to discuss the

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			evolution of the ecosystem on 21 <sup>st</sup> August
4	Monthly PSC meetings to end of the year	MPI	MPI to organise
5	Agritech strategy	MPI	MPI to work with Stephanie Howard and Steve Saunders on feeding into the agritech Industry Transformation Plan.
6	Forestry strategy input	MPI	MPI to work with the PSC subset and Te Uru Rakau
7	Taiao workshop at FOMA conference	Miriana Stephens	Get Taiao on the agenda for the FOMA conference
8	Share MPI's position paper and accord concept	MPI	
9	Communications plan and planning of November launch event	MPI/Steve Smith	Lucie Douma and Steve Smith to work together on collateral and development of a November launch event.

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## **Primary Sector Council – proceedings from meeting on 23<sup>rd</sup> September 2019**

The Primary Sector Council's (PSC) fourteenth meeting was held on 23 September 2019 in Wellington.

Attendees: Lain Jager (Chair), Miriana Stephens, Stephanie Howard, Tony Egan, Julia Jones, Julian Raine, Nadine Tunley, Neil Richardson, John Rodwell, Steve Saunders, Nigel Woodhead, John Brakenridge, Mark Paine, Steve Smith.

Not present: Puawai Wereta, Steve Saunders, John Brakenridge, Nigel Woodhead, Nadine Tunley.

Others: Warren Parker, Kimberley Ansell.

MPI officials in attendance: Ben Taylor, Lucie Douma, Rachel Carruthers, Penny Nelson, Grant Bryden, Julie Collins.

The overall objectives of the meeting were:

- Vision launch event planning
- Leadership ecosystem design
- Update from MPI on Forestry Strategy and FMAG work programme

### **Key Themes**

#### **Vision Launch Event Planning**

- Plan for an emotive build up to the launch event, releasing bits of information to engage the heads and hearts, and enough to paint a picture of what's to come. This will require a post event follow up of announceables. Trust of the farmers will be important. This will require external skills.
- The tagline "Fit for a Better World" would create a banner to operate under.
- Two event locations discussed: Lincoln as a venue would be suitable due to the impact of the water reforms in Canterbury. Alternatively, hold a pre-brief to sector leaders, launch event in Auckland in order to gain support from the general urban public first, then followed up with another event in Lincoln targeting the rural communities.
- The launch should include:
  - Taiao and what it means to farmers and growers.
  - The stewardship of Taiao.

- The leadership board structure/ecosystem along with those that will populate it.
- Key risks to the launch identified:
  - s 9(2)(ba)(i), s 9(2)(g)(i)
  - No forward momentum due to insufficient sector buy-in.
  - Water issues dominate.
  - Consultation fatigue.
- The Prime Minister has indicated she would like to attend the launch.
- The next step is a discussion on what funding is needed and how it fits in with what's already been allocated in Budget '19. This will enable a conversation with Ministers about future investments.

### **Leadership Ecosystem – Session 1: Slide Deck**

- Neil Richardson presented a slide deck on the ecosystem design for feedback ahead of Lain Jager's meeting with Ray Smith.
- The slide deck summarised the starting point, the problem, why there is a need for change, and the requirement for leadership skills to be deployed in the right areas to enable change – these are the building blocks in which to achieve action.
- The design of the leadership structure was discussed and the need for leadership capability to take the vision forward. Aspects discussed included the degree of autonomy, influence on the research, science and innovation system, and a requirement for sufficient funding in order for it to deliver.
- Appointments to the leadership structure need broad sector endorsement, and it should be a genuine government/industry partnership to enable change.
- The leadership structure will have to be able to understand our international customers, rather than just solving New Zealand's problems.

### **Forestry Strategy and Forestry Ministerial Advisory Group Update**

*Warren Parker – FMAG update*

- FMAG vision and PSC vision are complimentary.

- As well as a mitigation, there is also future potential to use forestry in alternative fuels and other bio-based materials. Important for setting up a bio-circular economy.
- Europe, UK and Finland all have bio-economy strategies with an interdependence between forestry and other sectors. Carbon price impacts the wood price and cost of former externalities.
- Therefore, FMAG are recommending a bio-economy strategy (i.e. the sustainable productions and conversions of renewable biomass, for food, health, fibre and industrial products) with three key planks:
  - Bio-economy hub including a pilot plant.
  - International links.
  - A dedicated bio-economy science fund.
- Next steps are to develop a detailed investment case for forest and wood processing.
- Forecasts of \$70 per tonne by 2050, but possibly needs to be higher to motivate change however need to be aware of impacts on rural communities.
- Desire to reposition wood processing from least-cost to optimal return. Forestry just now looking at whole-of-tree processing, like red meat did a while ago. Will require dedicated infrastructure and investment aligned with strategy.
- Bio-economy will require approximately \$15-20 million per year investment in science and technology.
- There needs to be tools and data sets that enable land to be used appropriately, and to ensure the right tree is being planted in the right place at the right time.

*Julie Collins – Te Uru Rakau*

- Developing a draft Forestry Strategy to present next March for consultation, with aim for final strategy in July/August 2020 – growth strategy across the value chain includes two aspects of forestry:
  - Reintegrating trees to support carbon credit adaptation.
  - Provide credible alternatives to the New Zealand economy (i.e. base of a bio-economy).

- Three tiered strategy:
  - Support domestic processing needs.
  - Build new processing capability to exploit value-add opportunities.
  - Advance bio-economy.

### **Leadership Ecosystem – Session 2: Roundtable Feedback**

- Steve Smith: The leadership structure should be set up to allow it to be progressive. The group needs independence. To give the group diversity, the structure should contain some members from platforms, brands, participants and a few from Iwi, government and sectors. For example, Bord Bia has 15 board members and only 4 from sector. The Netherlands is 1/3 government, and the remainder are elected from, and by, business and university groups. This structure needs sectors to come together to elect who stands for them. People need to be excited to be on the group.
- Stephanie Howard: Should ensure the focus is on the movement and change we want to happen. Where will the rapid transformations come from? This group needs to lead to a more ambitious vision that is out there with the people to help build the movement.
- John Rodwell: Those mentioned in the vision need to be on the group for the vision's success. The group needs to represent the future.
- Miriana Stephens: Should be strong Māori/Iwi representation, and possibly from a separate group.
- Julian Raine: Not sure of the best mechanism, but it needs the best people. The group should be small (6-8 people), and have influence on current sectors, Iwi, consumers, NGO's and consumers.
- Mark Paine: As well as selecting the right people, it needs the right performance criteria. There needs to be a report back, strategy and investment team. The levers are fundamental to the group.



**Actions from 23 September 2019**

<b>Reference</b>	<b>Action</b>	<b>Responsibility</b>	<b>Notes</b>
1	Suitable event dates for Minister and Prime Minister to attend	MPI	Follow up with Ministers and PM Office's
2	PSC expectations on what the event will cover	Julia Jones & Steve Smith	Two-page document
3	Develop a budget for the event	MPI	
4	Trade marking FIT FOR A BETTER WORLD	MPI	
5	Taiao timeline of work programme delivery	Stephanie Howard & John Rodwell	
6	Options paper on leadership structures	PSC led by Neil Richardson	

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## Primary Sector Council – proceedings from meeting on 16 October 2019

The Primary Sector Council's (PSC) fifteenth meeting was held on 16 October 2019 in Wellington.

Attendees: Lain Jager (Chair), Stephanie Howard, Julia Jones, Julian Raine, Nadine Tunley, John Rodwell, Steve Saunders, Nigel Woodhead.

Not present: Puawai Wereta, Steve Smith, Mark Paine, Miriana Stephens, Tony Egan, Neil Richardson, Steve Smith, John Brakenridge.

Afternoon Presenters: Lily Li and Sarah Meadows – MPI Science Policy Team.

MPI officials in attendance: Ben Taylor, Rachel Carruthers, Karl Yager, Sarah Holden, Grant Bryden.

The overall objectives of the meeting were:

- Update and roundtable discussion on:
  - Taiao workstream
  - Leadership group
  - Vision launch
- Update on MPI's Science Roadmap work
- Delegation of tasks for PSC report

### Key Themes

#### Take Stock Conversation

- Lain Jager proposed the new event date for the vision launch as the 12<sup>th</sup> December. All members present agreed with this date.
- A round table was held. The discussion included:
  - Taiao and the leadership ecosystem are the two main pieces of work, ensuring that the farmer/grower is thought of as the end user. These work streams should strike a balance between aspirational goals and practicality. Delivery will be key.
  - s 9(2)(ba)(i), s 9(2)(g)(i) [REDACTED]

## Briefing on Taiao

- The formation of the Taiao Reference Group was announced to the PSC to review and approve the Taiao work between now and the launch. Having the Reference Group will provide integrity to the work.
- It's now time to move Taiao from an idea to a practical framework. There are three areas that will be focused on:
  - Te Mauri o Te Taiao framework – outcome statements on what Taiao means across the landscape. The aim is to have examples across the four pillars ready to present by the 12<sup>th</sup> December event.
  - Taiao stewardship – An example of a partnership model will be understood by the 12<sup>th</sup> December. The stewardship model will be more cross-cultural than the leadership group but likely incorporate leadership group members. They will be responsible for maintaining the direction of the vision.
  - Taiao communications – ShiftOn will work alongside the Taiao group and the main event communications team. Two levels: capturing the hearts, and a piece talking through the Taiao framework (capturing the minds).

## Leadership Group

- Lain Jager presented a slide deck “Fit for a Better World” that will be used at the Stakeholder Forum with the members present.
- A brief discussion was had on who may make up the leadership group and who else might be required on it, s 9(2)(ba)(i), s 9(2)(g)(i)
- The sectors have to own the group if there is going to be any drive to get things done. How it would be funded was noted as important, and ensuring farmers recognised it was industry led and government enabled.
- Resources required for the group and where they would come from needs to be discussed. How these resources are sought/secured could affect the perception of the groups' independence/autonomy and ability to perform.
  - s 9(2)(ba)(i), s 9(2)(g)(i)
- Lain Jager asked for feedback on The Key Functions slide.

- Important to highlight who the leadership group is answerable to, its mandate/requirement for the group, and the measures to track progress.
- Emphasise the importance of alignment of strategy and science, as well as investment in innovation to enable an innovative ecosystem within the sector.

### **Vision Launch Discussion**

- Details known for the launch are:
  - It will be a lunch event, 2 hours long, held in Christchurch area.
  - Invitees: Blank page (100-150) – farmers and industry leaders.
- The deliverables for the event will be:
  - The vision.
  - The entity that will carry the vision forward: the new leadership group (or worked out concept).
  - Clear idea of Taiao and what it would look like on farm.
- The launch should be seen as the start of the conversation (this is “the farmers story”, what they are leaving for their grandchildren), with the intention to hook people in. The vision will come to life in the coming years as sectors discuss with their stakeholders how to apply it.
- Communications for and around the event will be important. Having industry on board promoting the vision is needed. There is a desire by PSC members to livestream the event.
- The process following the vision launch will be important to ensure there is no vacuum, and to maintain momentum. This may require industry roadshows and a way for farmers to connect and ask questions. There may need to be an interim group stood up to manage this.

### **Ministry for Primary Industries Science Roadmap**

- MPI's Science Policy Team presented the Science Roadmap and how Taiao has already become a focus of its work.

- The Science Policy Team is eager to maintain connection with the Taiao sub-group to understand how it can assist the PSC.

### PSC Report – Discussion

- A final report will enable members to document their journey to the creation of the vision. It should contain insights and evidence on decisions the PSC has made.
- Report should aim to be 10 pages, and possibly have a digital element – interviews of PSC members, etc. This could be presented on the vision website.
- MPI will discuss with the PSC about providing a writer, with members of the PSC providing the content.

### Agreed Actions

	<b>Actions agreed, 16 October PSC meeting</b>	<b>Owner</b>
1	Coordination between Taiao and launch event communications team: <ul style="list-style-type: none"> <li>- Weekly update emails</li> <li>- Ongoing conversation</li> <li>- Connect collateral creators, once Taiao proposal agreed</li> <li>- Create an overview of what the website could look like and contain (based on discussions had), to be shared for consultation</li> </ul>	Rachel Carruthers  Stephanie Howard/Julia Jones/Steve Smith/Miriana Stephens  Rachel Carruthers  Rachel Carruthers  Rachel Carruthers
2	Extend Doodle Poll dates	Rachel Carruthers
3	Raise MfE and Treasury attendance at workshop with Ray Smith	Lain Jager
4	Investigate livestream or recording options for event	Rachel Carruthers
5	Circulate a detailed launch run sheet, including a presentation breakdown	Rachel Carruthers
6	Send around report contents page electronically for feedback	Lain Jager

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7	PSC members to provide feedback on above report contents page by 25/10/19	ALL
8	Circulate calendar invite for next PSC meeting with venue (19 Nov).	Rachel Carruthers
9	Cancel December PSC meeting	Rachel Carruthers/Lucie Douma
10	Discuss a writer for the PSC report due December	Lain Jager/Grant Bryden

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## Primary Sector Council – proceedings from meeting on 19th November 2019

The Primary Sector Council's (PSC) sixteenth meeting was held on 19 November 2019 in Wellington.

Attendees: Lain Jager (Chair), Miriana Stephens, Tony Egan, Julia Jones, Nadine Tunley, Neil Richardson, John Rodwell, Nigel Woodhead, Mark Paine, Steve Smith.

Not present: Puawai Wereta, Stephanie Howard, Julian Raine, Steve Saunders, John Brakenridge.

Others: Hon. Damien O'Connor, Elisabeth Brown, Johny O'Donnell.

MPI officials in attendance: Nicky Willis, Karl Yager, Jackie Bedford, Grant Bryden, Ruth Fairhall.

The overall objectives of the meeting were:

- Discussion and debrief with the Minister of Agriculture.
- Update on Taiao.
- Vision launch event update.
- Leadership ecosystem design workshop update.
- PSC report.

### Key Themes


#### Discussion with the Minister of Agriculture

- The Minister thanked the members for their work. s 9(2)(ba)(i), s 9(2)(g)(i)  
[REDACTED]
- There is a need for more value over quantity. But the reasons for this may still require voicing. The PSC needs to provide the challenge for this shift.
- Points raised with the Minister:
  - We need to take people with us, but also lead the industries.
  - s 9(2)(ba)(i), s 9(2)(g)(i)  
[REDACTED]
  - The solution needs to be bi-cultural, include government agencies, and flexible as we learn.



- The leadership group needs an executive capability. There was a feeling it needs to be independent of government in order to make it enduring, not political, and allow for consistency. It needs to be attractive to industry, and a highly desirable group to work for/with.

### Update on Taiao

- Matauranga Māori experts are engaging with the contracted science experts to define Taiao on farm. Te Mauri o Te Taiao will be interconnected, looking across the whole system – catchment, through to leaders and Government. It's about sharing the load, rather than just burdening the farmer.
- s 9(2)(ba)(i), s 9(2)(g)(i)  

- Taiao is unique to us. It's a philosophy that speaks to New Zealanders, but fundamentally, its roots are based in what farmers already believe in, therefore it is very powerful. It will bring alive the voice of nature. Taiao is essentially about: if you look after the land, the land will look after you.
- Taiao is rooted with the producers and is their North Star, but there is a requirement to have this conversation with the consumers. It is a very easy concept to use for marketing purposes as it fits with many consumers ideals already. There will be value pathways, but if the producer is all about the money, they are not on-board.
- Taiao's strength for the image of producers is that it shows that producers are doing something above and beyond. But we still need to acknowledge all the good things going on – water reforms, farm plans, etc.

### Vision Launch Event Details

- Event details are finalised: venue will be the Sir James Stewart Lecture Theatre at Lincoln University, followed by lunch. The presentations will be one hour long. Annabel Laingbein and King Salmon will be assisting with catering. Annabel Laingbein will be MC for the event. There will need to be a good mix of people in attendance.
- The event will be the start of something that will be carried forward by the leadership group, who will be made up of sector representatives and Government. The leadership group will be stood up in the first quarter of 2020, and the PSC needs to leave them with a strong footing (like a roadmap) to start with.

- After the launch there will need to be an ongoing presence in mainstream and social media, with someone available to answer questions, especially over the holiday period. This will require resources and a budget.
- Speeches and press releases need to emphasise that the vision is not “another thing being imposed on industry”, but an opportunity to provide a solution through a pan-sector and Government relationship. The solution is to ensure there is alignment within all the sectors, enabling shared resourcing for the greater good, and the ability to learn from each other.

### Leadership Ecosystem Design Workshop Update

- The ecosystem needs to be a pan sector mechanism that the sector recognises and sees themselves as a part of, otherwise it will not be supported. However, it also requires sufficient outside thinking in order to support the required transformation.
- To be meaningful, it must intersect with the Ministry of Business, Innovation and Employment, Ministry for the Environment and New Zealand Trade and Enterprise, and create alignment within the sectors. And whilst there needs to be alignment, there needs to be the freedom to develop a high quality strategy.

### PSC Closed Doors Committee Meeting

#### PSC Report

- A writer has been employed for the PSC Report, who will work with each of the members individually.

#### Agreed Actions

	Actions agreed, 19 November PSC meeting	Owner
1	Distribute the current list of those attending and declining the invitation for the event to PSC members.	Rachel Carruthers
2	All PSC members to go through the above list and ensure there is good representation.	All PSC members
3	Identify resource to ensure there will be media presence over the holiday period.	Steve Smith/Rachel Carruthers
4	Press kit for the event.	Rachel Carruthers/MPI

		Communications Team
5	List of people required to be prepared for media questions.	John Rodwell
6	Distribute vision collateral to PGG Wrightson stores nationwide.	Rachel Carruthers/Sheryl Pinckney

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