

**Report on the incorporation of traditional  
values/tikanga into contemporary Māori business  
organisation and process**

Garth Harmsworth

**Report on the incorporation of traditional values/tikanga into contemporary Māori business organisation and process**

Garth Harmsworth (Te Arawa, Ngāti Tūwharetoa, Ngāti Raukawa)

Landcare Research  
Private Bag 11052  
Palmerston North  
[HarmsworthGarth@LandcareResearch.co.nz](mailto:HarmsworthGarth@LandcareResearch.co.nz)

Landcare Research Report: LC/0405/058

PREPARED FOR:  
Mana Taiao Ltd  
PO Box 11 829 Ellerslie  
AUCKLAND

DATE: October 2005

---

*Reviewed By:*



Buddy Mikaere  
Programme Manager

*Approved for Release By:*



Richard Gordon  
Science Manager

---

© Landcare Research New Zealand Ltd 2005

No part of this work covered by copyright may be reproduced or copied in any form or by any means (graphic, electronic or mechanical, including photocopying, recording, taping, information retrieval systems, or otherwise) without the written permission of the publisher.

---

## Contents

---

Executive summary .....	5
1. Introduction .....	6
2. Values in Business .....	7
3. Traditional Māori Values .....	14
4. Māori Economic Development .....	22
5. Values and Branding .....	23
6. Case Studies .....	26
Case study 1: Tohu Wines Ltd .....	27
Case study 2: Wakatu Incorporation .....	31
Case study 3: Biofarm Products Ltd .....	35
Case study 4: Ngai Tahu Seafood Ltd .....	37
Case study 5: Shotover Jet Ltd .....	43
Case study 6: Team Logistics Ltd .....	48
Case study 7: Whale Watch® Kaikoura Limited .....	53
7. Analysis and Evaluation .....	69
7.1 Analysis and evaluation of case studies .....	69
8. Summary Results .....	103
9. Conclusions .....	108
10. Acknowledgements .....	110
11. References .....	111
12. Bibliography/Recommended Reading .....	113
13. Appendices .....	117
Appendix 1. The international values inventory (AVI) for organisations and businesses. ....	117
Appendix 2. Key Māori values and definitions .....	127
Appendix 3. Māori Glossary of terms .....	132
Appendix 4. The questionnaire used for case studies in this research (Waka Tohu, objective 3)...	134
Appendix 5. Intellectual property framework, plans, and relevant links for the Waka Tohu programme .....	137

### List of Tables and Figures

Table 1. The values shift in the Australian workplace .....	11
Table 2. Shifts in business values since the early 1800s .....	12
Table 3. Business terms, expressions common in statements of intent, annual reports, strategic planning .....	16
Table 4. Māori values and concepts commonly used by contemporary Māori organisations .....	17
Table 5. Examples of Māori terms used by Māori business and enterprise .....	18
Table 6. Emerging values in the 21 <sup>st</sup> century .....	24
Figure 1. A Māori business framework to measure Māori values and outcomes .....	21
Figure 2. A four-axis model describing the relationship with brands .....	24

---

## Executive summary

---

### Project and client

This work was carried out in the programme “Māori business branding: achieving competitive advantage in global markets”, short title Waka Tohu, funded by the Foundation for Research, Science and Technology (FRST). The programme is led by Buddy Mikaere of Mana Taiao Ltd.

### Project rationale

Very little research has been carried in New Zealand to understand the role of traditional Māori values in the contemporary New Zealand business environment, and the increasing importance placed on defining and implementing values and ethics in the global business environment. To maintain cultural integrity and identify advantages for Māori business in the national and global marketplace, it is important to understand the role of Māori culture in a contemporary business environment.

### Objectives

Objective 3 “Māori values in the Māori business approach” is one of 4 objectives in the FRST programme Waka Tohu. This work identifies how Māori organisations and businesses incorporate traditional values/tikanga into contemporary Māori organisation and processes and integrate their unique cultural heritage and values into their business approach. Research will also be used to show how they communicate and protect that cultural point of difference in global markets. It will provide information on how Māori businesses can achieve a sustainable competitive advantage based on unique cultural dimensions of governance and performance. Case studies and international literature are being used to demonstrate the implementation of Māori traditional principles into ways of doing business.

### Methods

Methods involved a literature review and summary, a number of interviews, and documented case studies with a selected number of Māori organisations and businesses. Target business sectors were used to select case studies.

### Results

This report documents interim findings at the end of year two. Findings show distinct parallels between an emerging interest internationally in the role of values and ethics for defining company culture, developing long-term strategic plans, and achieving sustainable growth and development. Māori values form the basis of Māori culture and have a significant role to play in Māori business. Results indicate that Māori values are instrumental in defining a Māori organisation, maintaining cultural and ethical standards, giving direction, and provide a point of difference in the global market place.

---

## 1. Introduction

---

This report documents findings at the end of year two of a Foundation for Research, Science and Technology (FRST) funded objective “Māori values in the Māori business approach” that is part of larger programme called “Māori business branding: achieving competitive advantage in global markets”. The short title for the programme is Waka Tohu. The FRST programme is led by Buddy Mikaere of the private organisation Mana Taiao, and is run jointly with Manaaki Whenua. The programme involves contribution from agencies such as Federation of Māori Authorities (FOMA), Te Rūnanga O Ngai Tahu, University of Waikato, New Zealand Trade and Enterprise, Creative New Zealand and private Māori research consultants. The unique research partnership brings together leading Māori business organisations, researchers, government agencies and other Māori entities. International links are also being forged with other indigenous communities and businesses such as First Nation peoples in North America.

“Māori business branding: achieving competitive advantage in global markets” is researching the potential for the innovative use of Māori business branding to provide a unique competitive advantage in global markets, and will provide information on how to increase export sales through Māori business branding. The programme has four objectives:

- Global market responsiveness – Understanding the competitive advantage or perceived added value there is from being a Māori company, what is the market “pull” for Māori business, products and services
- Māori branding experience – Determining how Māori companies should market themselves to create competitive advantage. How to create the “push” to develop and maximise market opportunities
- Māori values in the Māori business approach – Identifying how companies integrate their unique cultural heritage into their business approach and communicate and protect that point of difference in global markets
- Implementing innovative Māori business branding – Developing innovative models of business branding and service development, for trial implementation by Māori businesses participating in the programme

Branding is a relationship rather than a statement. It includes visual imagery, text, iconography, graphics, and any media a company is using and associating with its products and services to create a point of difference, a statement of identity, a standard, ethics, or values in the market place. It includes trademarks and patents and all distribution material. Branding is much wider than this, however, and is increasingly being used to reflect the values, ethics and standards of a company. Protecting intellectual property is therefore a major issue that goes hand in hand with branding (Appendix 5). For this research, results to date show there is a growing body of anecdotal evidence that overseas markets are responsive to Māori branding.

The research will make a significant contribution to how the national and international marketplace sees indigenous branding. A number of ‘pioneer’ Māori exporters will be established to trial and evaluate the lessons learned from early research results. Mr Mikaere who leads the Waka Tohu research programme says “one of the challenges being addressed by the research team is a global tendency to associate indigenous branding with developing economies”. “Authenticity is a crucial focus for the research project”, “applying traditional Māori values and knowledge delivers valuable and authentic products and services which we want to market at the high end of the spectrum”, “an education and marketing programme will be vital to establish the quality of goods and the cultural heritage underpinning them”. “This is the only place in the world with Māori culture, let’s use it, along with the generic brand New Zealand, to sell what we do best to the world”(Buddy Mikaere, pers. comm.).

---

## 2. Values in Business

---

To understand the role of traditional Māori values in Māori business organisation and to process it is important to examine the way modern sets of values are defined and being implemented, especially within an international business environment.

An increasing number of organisations worldwide are recognising that the use of values in business is not trivial, irrelevant, or indulgent, but is an integral part of effective management, touching all aspects of a companies operations (Paine 2004). The importance of values is well documented: “The degree to which an organisations values are deliberately chosen and embodied by its people directly influences the degree of success the organisation can expect to experience in achieving its objectives”, “More than any other concept, [values are] an intervening variable that show promise of being able to unify the apparent diverse interest of all the sciences concerned with human behaviour” (Rokeach 1973).

Values lie at the core of corporate performance, and “given the extensive role played by companies in the world today, corporate performance is something that concerns virtually everyone” (Paine 2004). The way a company expresses its values is becoming a powerful determinant for consumer preference.

### Definition of values

“Values are the sum of our preferences and priorities. Preferences are what we would rather have in our lives than do without. Priorities indicate how important each preference is in relation to another” (Henderson & Thompson 2003). “Values therefore capture and express what is important to us – in life and in business”. “Values also create focus” (Henderson & Thompson 2003). Once values are identified we can direct our efforts and attention into what we have decided is important. Values enable us to begin to understand our underlying motivations, beliefs and assumptions.

Rokeach (1973) defined a value as: “an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence”. Values have been described by Henderson and Thompson (2003) as the “invisible threads between people, performance, and profit”. “Every organisation has values, whether it consciously realises this or not. Those organisations that understand their values can guide their own destiny and create for themselves a sustainable competitive advantage”. This advantage is usually achieved through integrating values in all business decisions. Values are closely related and often based on beliefs. A value can be seen as what you believe in; the belief is why you believe in it (Henderson & Thompson 2003). Values, however, should not be confused with the following terms:

- Ethics – agreed codes of behaviour adopted by a group or association
- Morals – adopted viewpoints, pertaining predominantly to what we perceive as good or bad; often judgemental, perceptions of right or wrong
- Principles – agreed upon time-tested truths, of a natural, scientific, or man-made nature
- Judgements – our defining labels (usually expressed adjectives) representing our beliefs about something or someone; often require a moral or cultural perspective
- Attitudes – a culminating effect of a collection of beliefs about something, a situation or someone; reactive responses to environmental stimuli
- Virtues – preferred personal characteristics of something or someone; typically, the behavioural characteristics of an individual, e.g., courage or patience
- Needs – perceived necessities. Abraham Maslow (psychologist) suggested human beings gain their motivation for behaviour from their needs, and produced a well-known hierarchy of needs (1971)

- Beliefs – critical when working with values, and often create the value; provide understanding of the underlying sets of beliefs, or belief systems, that may be cultural.

### **Examples of value preferences**

Businesses may include the following preferences that relate to how a company operates (from Henderson & Thompson 2003):

- Economical and successful
- Mission- and objectives-driven
- Profitable
- Growth- and expansion-oriented
- Quality conscious
- Responsible to the community
- Efficient and well planned
- Research- and knowledge-focused
- Customer-focused

If an organisation selects profit as one of its values, the beliefs underlying the value might range from maximising profits to return to the shareholders, a profit indicates successful marketing and export returns, a profit directive defined by head office, a profit in order to grow, a defined profit in order to achieve a triple bottom line (Henderson & Thompson 2003). Therefore, “underlying beliefs are important because they create an emotional connection to the value and they influence the priority we place on it” (Henderson & Thompson 2003).

Actions, business practice, and decision-making are all influenced by values, and are fundamental to the way an organisation or business operates. The degree to which an organisation’s values are chosen and embodied by people directly influences the direction and degree of success a company can expect to experience in achieving its objectives, goals, and strategies. A list of 125 globally recognised values – referred to as the AVI: A Values Inventory – are given in Appendix 1. These values have been developed by the Minessence Group, an international network of qualified consultants (Henderson & Thompson 2003). As part of this research a Māori values inventory (AMVI) has been given for comparison and implementation (Appendix 2).

### **Principles based on values**

A number of principles are based on values provided by Henderson and Thompson (2003). These principles provide a useful framework for using values within an organisation and are given below as a set of guidelines:

- Values are the priorities and preferences of individuals and groups that reflect what is important to them
- Unprioritised values create conflict
- An organisation’s values are its real leader
- Values are the DNA of all organisations’ culture; they determine what happens and why
- Organisations do not put their values into practice, people do
- Values drive performance
- Decisions are based more on values than on rational analysis
- Values determine quality
- The values at work within an organisation influence behaviour.

### **Value-based benefits for organisations**

“Seeding a company’s culture with the right values is the most powerful thing you can do”, “Ultimately the culture will become more important to the success or failure of the company than you are”. The culture you establish will guide and teach all your people in all their decisions” (Scott Cook in Paine, 2004).



Some of the benefits for organisations becoming value based include (Henderson & Thompson 2003):

- Financial benefits
- Growth
- Intellectual capital
- Emotional capital
- Aligned values increase staff morale
- Reduced corruption, ethics
- Values enable faster reactions and decision-making, productivity
- Improved customer service and relationship-building
- Increased commitment by sales staff
- Recruitment
- Values build the brand
- Decreased absenteeism
- Increased tolerance, cultural sensitivity, cultural, ethical, moral awareness
- Staff bring more of themselves to work, creativity, ideas, loyalty
- Values drive commitment
- Added performance indicators
- Define and strengthen company culture
- Sustainable economic growth
- Sustainable development.

### **Global importance of values in business**

International evidence supports the occurrence of significant value shifts in one generation (Henderson & Thompson 2003; Paine 2004), particularly reflect a change in societal and cultural values. Paine (2004) described a new emerging standard of international corporate performance that was largely a result of consumer and shareholder dissatisfaction with company behaviour, especially since 1980, evidenced by large business scandals, fraud, deception, corruption, insider trading, and amoral behaviour. Many companies are also asking questions that look beyond profit making: what is our purpose? What do we believe in? What principles should guide our behaviour? What are our obligations and responsibilities to shareholders, constituencies, and communities? In a global environment many companies are increasingly targeted and criticised for poor environmental performance, lack of social responsibility, and low ethical and moral standards. Global branding, general trade agreements, free and fair trade, social justice, and international quality standards are important issues for companies to address.

Ethics and values have increasingly found their way onto the company agenda. Because values are at the core of behaviour, and distinguish an organisation's culture, Pain (2004) described this progressive change in company behaviour a "turn to values – a growing emphasis on values, culture, ethics, stakeholders, and citizenship":

More companies have taken efforts to strengthen their reputations or become responsive to the needs of their various constituencies....An increasing number of initiatives are being taken by companies including: diversity, quality, customer service, health and safety, the environment, legal compliance, professionalism, corporate culture, stakeholder engagement, reputation management, corporate identity, cross-cultural management, work-family balance, sexual harassment, privacy, spirituality, corporate citizenship, cause-related marketing, supplier conduct, community involvement, and human rights.

Paine (2004) believed that companies are becoming more attentive to stakeholders and constituencies, and more concerned about their behaviour for a variety of reasons:

- global citizenship – being a world-class organisation
- increasing their reputation for integrity and social responsibility, a belief that high ethical

standards often correlate with high financial performance

- customer trust
- attracting the best employees
- the right value system can build a global brand
- to set standards for decentralisation
- building an entrepreneurial culture
- establishing role model companies
- social compatibility
- developing a company culture to avoid scandals.

Broadly speaking, five main areas have emerged that provide the rationale for this shift of values (Paine 2004):

- Risk management – eliminating risks from the workplace such as misconduct, carelessness, neglect and insensitivity, to minimise the incidence of malfeasance and damaging consequences.
- Organisational functioning/building – that help build a well-functioning company, with effective governance, responsibility, delegation, improved decision-making, based on values essential for encouraging cooperation, inspiring commitment, nurturing creativity and innovation, and generating a positive self-image. This type of organisation provides ideals of respect, honesty, and fair dealing that can produce a high performance culture.
- Market positioning – the importance of values that shape a company’s identity and reputation; building its brands; earning trust, respect, loyalty, expectations from customers, suppliers, constituencies, and stakeholders; maintaining a point of difference, a relationship, a standard; using values to underpin products and services.
- Civic positioning – corporate citizenship, the companies standing, reputation and position within a local community, constituency, or national or global environment, not just the marketplace. Very much reflecting societal values at any point in time, and building relationships with civic constituencies such as governments, non-government organisations, local communities.
- A better way – organisations use values as fundamental principles to achieve responsibility, humanity, and citizenship. Ideals include honesty, trustworthiness, innovation, fairness, responsibility, and being good citizens because of organisational culture. May include the doctrine of moving towards a state of sustainable development

While some companies are proactively shifting to values, for many other companies the shift unfortunately is a reaction or response to a major damaging issue, crisis, scandal, poor company performance, amoral behaviour, lawsuits, or fraud. Henderson and Thompson (2003) used a number of studies to describe the marked shift in organisational values from the 1980s to the end of the 1990s, “The increasing interest in searching and discovering meaning in one’s life suggests a significant values shift is underway amongst most people and organisations”. In the developed world, psychologists (Jones 2000) have described what they see as “shifting from being sustenance-driven (looking for basic needs to be met), through to being outer directed (looking for esteem and status), to inner-directed (looking for self-fulfilment), which is being reflected in company culture”. In 1994 the US consulting firm, Compass Group, found the top eight priorities in the workplace to be:

- Growth and development of individuals
- Management taking a long-term view

- Management caring about all stakeholders
- Social responsibility
- Democratic participation in the organisation
- Ecological values
- Spiritual values
- Employee ownership (Chippendale & Colins 1995).

Chippendale and Colins (1995) concluded that “the disparity between the values people currently hold as a priority and the institutional materialistic values is creating a tension that will force organisations to either realign their values to today’s values or perish”. “It is the gradual impact of this disparity that has led to organisations beginning to take notice of the signs of values conflicts and taking a serious interest in values alignment”. Studies by the Values Education network in Australia have also shown a marked change in people’s value priorities (Henderson & Thompson 2003). A survey conducted in 1988 and again in 1998 is shown in Table 1, with the values listed in order of priority.

**Table 1.** Survey results showing in priority order the values shift in the Australian workplace (Henderson & Thompson 2003).

<b>The values shift in the Australian workforce 1988–1998</b>	
1988	1998
1. management	1. self-competence/confidence
2. collaboration/subsidiarity	2. relaxation
3. decision/initiation	3. being self
4. responsibility	4. decision/initiation
5. rights/respect	5. family/belonging
6. self-competence/confidence	6. life/self-actualisation
7. family/belonging	7. synergy
8. sharing/listening/trust	8. generosity/service
9. being self	9. loyalty/fidelity
	10. sharing/listening/trust

The survey (Table 1) concluded that in 1988, people viewed the world of work as being about:

- effective management
- delegation
- productivity, which is achieved through taking responsibility for one’s actions
- treating each other with respect
- having the competence and confidence to undertake one’s allocated role.

In 10 years people have shifted their values from working to live and generating revenue to support lifestyle, to values that are more inwardly directed, reflecting self-fulfilment and meaningful work. There has been a global shift in values’ alignment between people’s personal values and the organisations they work for, and whether the organisations’ values can help advance individual personal values.

A series of stockmarket crashes involving corruption, fraud, and other degrees of dishonesty have made shareholders increasingly wary. Their subsequent interest in organisational values, transparency, and accountability resulted in another international shift to the promotion by companies of ethical personae and to the branding of themselves with a strong values and ethical base (Paine 2004). The shift in key values through time is illustrated in Table 2 and shows quite marked shifts every decade. The challenge for all businesses and organisations is to understand and

keep pace with the changing personal values of the workforce. Henderson and Thompson (2003) stated that, “organisations often struggle to predict and survive global value shifts.... while it is easy for organisations to fail to recognise this values shift they certainly won’t fail to miss its consequences”. Chippendale and Colins (1995) suggested that to lead any group effectively, leadership style must be congruent with the values of the followers.

Internationally and nationally a large number of companies (e.g., Vodafone New Zealand, Burger King New Zealand, Telecom Directories Ltd) are increasingly adopting an integrated values approach for planning and decision-making by implementing values-based processes. Vodafone Pacific CEO Grahame Maher (quoted in Henderson & Thompson, 2003) said, “a values-based organisation is one that exists for some reason above and beyond solely making money” and is a necessary approach for “unlocking the potential of people”.

**Table 2.** Shifts in business values since the early 1800s (Minessence Group, Henderson & Thompson 2003).

<b>Shifts in business values</b>		
<i>Key values</i>	<i>Period</i>	<i>Change in management orientation</i>
Growth	Early 1800s	Large organisations created as a result of a focus on growth
Efficiency	Late 1800s	Scientific methods applied to management with a view to making organisations more efficient
Engineering	1910s	Production, inward-looking. Customers taken for granted
Finance	1920s	Expansion. Investment and growth focus
Accounting	1930s	Depression. Tight financial and cost control
Production	1940s	War. Production focus
Sales	1950s	Sales. Sell as much as you can of what you have
Marketing	1960s	Marketing. Design what people want and sell it
Strategic wider Planning	1970s	Look for the relationship of the company to the business environment and place the company squarely in that environment
Strategic management	1980s	Create and develop management structures that provide a future direction for the business
Entrepreneurship	mid-1980s	Belief creates reality. More about image than substance. Means justify the end.
Competing world-views: social ecology/ economic rationalisation	1990s	Social ecology: vision of direction combined with concern about how organisational activities impact on people and the environment. Economic rationalism: competing in a global market place, letting the free market determine what should survive
Principled management/ managing meaning	2000s	Focusing on using science and research to identify underlying principles to inform organisational and managerial theory

### **Values in New Zealand**

Values are becoming a central and significant topic of discussion in New Zealand. They are strong determinants of behaviour, and the achievement of sustainable development requires behaviour to be consistent with the overall concept. For groups such as Māori many of these values are traditionally based and commonly derived from Māori culture.

The Growth and Innovation Advisory Board (<http://www.giab.org.nz/>), established 2002, provides the New Zealand Government with independent informed perspectives on how the Government can advance its growth and innovation programme. The GIAB focuses on determining which policies and practices best support growth of the New Zealand business sector, within the context of an inclusive economy.

When it developed its work programme, the Board placed particular emphasis on values and culture, as it believed this to be a vital ingredient for growth and innovation. The GIAB commissioned research (GIAB 2004) that showed New Zealanders rated the following lifestyle and personal factors as most important to them:

- quality of life
- quality of the environment
- quality of education
- quality of health services

[http://www.giab.org.nz/uploadedfiles/Documents/Reports/Research\\_Summary.pdf](http://www.giab.org.nz/uploadedfiles/Documents/Reports/Research_Summary.pdf)

The GIAB went on to recommend a values-driven growth economy, based on core values. For sustainable development to work it is important both to identify cultural factors important to the wider population, often termed ‘Kiwi values’, and, at a lower level, to determine values associated with various groups in New Zealand, often on the basis of ethnicity, religion, gender, interest, or occupation. For Māori, cultural values are a significant part of all strategic planning and development and are increasingly used in the business and international marketing environment. Cultural values are also important to businesses and to those engaged wanting to report cultural benefits and responsibilities as part of quadruple bottom line reporting. Internationally, cultural values will be significant driving forces to achieve sustainable development in the 21<sup>st</sup> century, as many countries and groups within countries place increasing emphasis on cultural identity and world-view, because aspirations and goals are often attached to these.

---

### 3. Traditional Māori Values

---

Traditional Māori values have been taught for hundreds of years, and more recently documented in the 20<sup>th</sup> century (Appendix 2). They are primarily based on Māori knowledge passed down from ancestors.

To understand Māori values it is important to know their origins; and by understanding their traditions, the contexts in which they are being used in modern business. Māori values are largely based on traditional concepts, beliefs and values, and shape the thinking of many Māori. From whakapapa and through time Māori acquired knowledge, termed Mātauranga Māori; and from knowledge came Māori values (Barlow 1993; Mead 2004). It must be emphasised that for Māori this knowledge is still being created and is not just a remnant of the past. Māori values form the basis for explaining the Māori world-view (Te Ao Māori), provide an intrinsic cultural basis for controlling or modifying human behaviour, determine issues and perspectives, and provide the concepts, principles and lore Māori use to varying degrees in everyday life. They affect the interaction with others, govern responsibilities, establish the relationship with both the natural and spiritual environment, and form the basis for indigenous aspirations.

Māori values therefore form the basis for developing principles, protocols, ethical and cultural standards, and for guiding philosophies for culturally based sustainable economic development. Values tend to work in combination to form a solid foundation and framework for tribal development and sustainable economic planning. The following traditional concepts, organised by theme, are explained to provide understanding of their relevance to strategic planning and business.

*Tikanga* denotes the Māori body of rules and values used to govern or shape peoples behaviour and some of the key values include: *Tino Rangatiratanga* and *Mana Motuhake* – self-determination, independence or inter-dependence; *Mana Whenua* – rights of self governance, rights to authority over traditional tribal land and resources; *Whānaungatanga* – family connections and family relationships; *Kaitiakitanga* – guardianship of the environment; *Manaakitanga* – reciprocal and unqualified acts of giving, caring, and hospitality; *Arohatanga* – the notion of care, respect, love, compassion; *Awhinatanga* – assist or care for; *Whakakoha* – the act of giving; *Whakapono* – trust, honesty, integrity; *Whakakotahitanga* – respect for individual differences and participatory inclusion for decision making; *Wairua* – the spiritual dimension to life.

Māori values can be expressed in many forms.

#### Key Māori values

Some of the key Māori values referred to during interviews and case studies included:

- Iwi....tanga
- Whakapapa
- Tino rangatiratanga, rangatiratanga, mana motuhake
- Whānaungatanga
- Whakakotahitanga, kotahitanga
- Mana whenua, mana moana
- Kaitiakitanga
- Manaakitanga
- Arohatanga, Aroha
- Awhinatanga
- Turangawaewae
- Koha, Whakakoha

- Whakapono
- Te Aoturoa
- Taonga tuku iho (e.g., te reo Māori, wahi taonga, taonga whakairo)
- Kōkiri, Kaikōkiri
- Tohungatanga
- Wairuatanga

Definitions for Māori values can be found in Appendix 2.

### **Māori values in business**

In contemporary society Māori values are a mix of the traditional and the modern – part of the mind, the soul and the body – and usually reflect upbringing, cultural environment, learning, action and association, and knowledge (Mātauranga). Marsden (1988) provides one definition of Māori values: ‘instruments through which Māori people experience and make sense of the world’. Other definitions include the way Māori ‘experience, analyse, and interpret their world, influenced by the physical, social and spiritual context in which they grow up’. Māori values are central to Māori culture and Māori life and form the basis of identity. Values guide thinking, behaviour, actions and relationships. They can form a guiding philosophy and set of principles for an individual or an organisation. At an individual or organisational level (e.g., business, company) they are intrinsic for establishing and influencing:

- thought
- reaction
- a world-view
- behaviour
- guiding philosophy
- organisation
- responsibility
- ideas, innovation
- relationships
- priorities, preferences, issues
- decision-making
- direction
- actions

Increasingly, businesses around the world talk about having a company culture, the culture by which they want to operate and organise internally, and how they want to be seen by others. This is often a positioning and branding exercise, and can reflect intrinsic values or designed purpose-built values for a given constituency. Many modern organisations have expanded their thinking, operations and behaviour to something much wider than simply values that focus on economics and profits (Table 3). Many increasingly try to balance their operations to reflect economic, social and environmental performance, and to measure and report on that performance accordingly.

**Table 3.** Business terms, expressions common in statements of intent, annual reports, strategic planning

<b>Common business terms</b>	<b>Common business terms</b>
Governance, corporate, organisation, company, incorporation	Legislation, compliance, civic, constitution, convention, framework
Leadership, board of directors, joint ventures, subsidiary companies, partners	Shareholders, investors, beneficiaries
Vision, mission, policy, goals, objectives economic, social, cultural, environmental goals, guidelines	Values, ethics, social responsibility, socially responsible, equity, social justice
Goals, outputs, outcomes, policies	Excellence, quality, products, services
Strategic planning, short term and long term strategies, purpose, statement of corporate intent, commercial targets, standard operating procedure (SOP), progress	Consumers, customers, commodities, buyers, sellers, vendors, trading, traders, exports, imports
Chief Executive Officer, Managers, Staff employment, employer, employee	Human capital, capacity building, skills, capabilities, training
Teamwork, loyalty, integrity, goodwill, honesty, caring, benefits	Economic, performance, accounts, audits, auditor, investment, taxation, accountability, statements, reports
Financial performance – assets, capital, value, equity, investments, total equity, income, revenue, dividend, interest, shares, reserves, retained earnings, currency, fiscally prudent, credit, profit, profit target, operating profit, profit margin, cash flow, quota, surplus	Financial position – budget, accounts, current accounts, expenses, borrowing, loans, liabilities, fees, depreciation, tax, debt, debt to equity ration, remuneration
Administration, health and safety, equal employment opportunities (EEO), employment relations Act (ERA), performance, reports	Production, productivity, production line, sales, units, development, technology, research and development (R&D), innovation, creativity, enterprise, product lines
Markets, market niche, new markets, International markets, opportunities	Advertising, branding, marketing
Global, globalisation, global economies, global marketplace, international	Intellectual property (IP), trademark, copyright, patent, registered design, logos, symbols
Sustainable, sustainable development, resource management, guardianship, stewardship, sustainable resource use	Agreements, contracts, memorandum of understanding, tenders, acquisition, transfer
	Environmental standards, accounting standards, environmental reporting, bottom line, indicators, triple bottom line reporting

Māori organisations, such as trust boards, rūnanga, and incorporations, are often borne out of a cultural and legislative context that embodies politics, issues, history, tradition, governance, inheritance, values, custom, relationships, and responsibility. The strategic direction, purpose and function of these organisations is commonly influenced by their history, governance, politics, and ancestral links, that determine lines of business and service, and usually reflects the expectations of the constituency they represent. The wide scope or portfolio of many Māori organisations can also inhibit or affect effectiveness, performance and achievement. A Māori business such as a company focussed on enterprise, innovation, products, and services, has more control of its direction, select the values with which it wants to be associated, work for a defined constituency, be responsive, and



develop around Māori values as a core set of principles (Table 4). Principles and a guiding philosophy based on values can determine how the company wishes to operate, and organise internally, how it relates to others, how it wishes to be seen by others, and help establish a company culture. This is often a positioning and branding exercise, and can reflect intrinsic values of individual staff, the nature of the organisation as a whole, or designed purpose-built values for a given constituency or market. Triple or quadruple bottom line reporting may be used to measure the performance of these organisations and provide examples of behaviour and company culture.

**Table 4.** Māori values and concepts derived from traditional Māori values and commonly used by contemporary Māori organisations

<b>Māori term, expression, concept</b>	<b>Common translation</b>
Whakapapa	Ancestral lineage, hereditary
Tino rangatiratanga, mana motuhake	Sovereignty, self determination, authority, independence, empowerment
Tikanga	Values, customs, protocols, guides of behaviour, lore, framework, correct, correct way, the right way
Kawa	Protocol, custom, ceremony, standards
Whānaungatanga, whānau	Family, extended family, relationships
Mana	Prestige, authority, status
Mana whenua	Sovereignty, prestige, responsibility, autonomy, status over land
Mana moana	Sovereignty, prestige, responsibility, autonomy, status over water, oceans, marine environment
Kaikōkiri, Kōkiri	Advance, competition, enterprise, warlike, going forward
Manaakitanga, manaaki	Looking after, caring, hosting, hospitality
Kotahitanga, whakakotahitanga	Unity, team work, consensus, working together
Awhinatanga, awhina	Caring for, assist, help, support
Aroha, arohatanga	Care, love, respect, charity.
Tika	Truth, accurate, appropriate, correct, doing things the right way
Akoranga	Doctrine, learning, training, traditional teachings
Kaitiakitanga	Guardianship (environmental and cultural)
Te Ao Turoa	Sustainable use of resources, inter-generational equity
Mana Taiao	Caring for the environment, authority to care of the environment
Taonga tuku iho	Sustainable use and protection of treasures, resources, inter-generational equity
Tau utuutu, utu	Reciprocity, giving back what you take, maintain balance
Oranga, ora	Wellbeing, living, welfare
Ora, Waiora, Hauora	Health
Waioratanga	Soundness, quality
Whakapono	Trust, believe, honest, honesty
Ngākau pono	Sincerity, in good faith, loyalty
Mātauranga	Knowledge, traditional knowledge
Mauri	Life force, quality, power, energy, life essence
Tapu	Sacred, closed, prohibited, off-limits, restricted use
Noa	Open, accessible, unrestricted but conditional use
Wehi	In awe, fear, respect, reverence
Ihi	Internal strength, power, inspiration, essential force
Wairua, wairuatanga	Spiritual dimension, spirituality
Atua	Departmental gods, deity, divine, supernatural being

**Table 5.** Examples of Māori terms used by Māori business and enterprise

<b>Māori term, expression, concept</b>	<b>Common translation</b>
Kāwanatanga	Governance
Rōpū whakahaere, ngā tari	Organisation, office
Pakihi, umanga, kamupene	Company
Rangatōpū	Corporate body
Ngā uri, kawa	Shareholders, beneficiaries
Apataki	Client base
Kaupapa, Kaupapa korero	Theme, topic, programme, project, idea, subject, framework, foundation, platform, basis, ground rules, plan, scheme, principle
Take, Rārangi take	Issue, agenda, basis
Hui	Meeting
Awheawhe	Workshop
Mihi	Greet
Whakaaro	Thinking, frame of mind, thoughts, ideas, hypothesis
Mōhio, mōhiotanga, whakamōhio	Comprehend, understand, intelligence, inform
Whakamārama	Explain, interpret
Whakamōhio	Communicate
Kōtuitui	Network
Whiriwhiri	Discuss
Mātauranga	Knowledge
Kanohi ki Kanohi	Face to face, eye to eye
Korero	Talk, discussion
Whakatakotoranga	Decision-making, reporting
Whakatau	Resolution
Rangahau	Research
Hangarau	Technology
Pūnaha	System
Rorohiko	Computer
Rangatira	Chief, boss, employer
Tumuaki	Chairman, head, CEO
Kaiwhakahaere	Manager, Leader, CEO
Kaitukumahi	Employer
Kaimahi	Employee
Tohunga	Expert
Mātanga	Specialist
Pūmanawa	Skill
Manuhiri	Visitor
Rōpu	Group, association
Rūnanga	Council, body, assembly, organisation, consultation

**Table 5 (continued).** Examples of Māori terms used by Māori business and enterprise

<b>Māori term, expression, concept</b>	<b>Common translation</b>
Tikanga	Values, custom
Matatika	Ethical, ethics
Matakite, Tūtoro	Vision
Tohenga	Goal
Whakatakanga	Mission
Whāinga	Objective
Tohu	Marker, brand, provide direction
Waka	Vehicle, focus, same direction, same team
Ngā whakataua	Decisions, adjudicate, arbitrate
Tari	Department
Wāhanga	Section, unit
Pūtea	Budget, finance, financial, grant
Utu	Cost
Taonga	Goods
Ngā ratonga	Services
Tino taonga	Valuable
Mana whakairo hinengaro	Intellectual property rights
Ora me whakarurutanga	Health and safety
Takoto, huarahi	Standard procedure, procedure
Tūuranga	Standard, standard of behaviour
Ngā ture	Acts, rules, regulations
Tautoko	Support, supportive environment
Pūrongo	Report
Rautaki, mahere rautaki	Strategic, strategic plan
Tapu	Sacred, prohibited, off-limits
Matatapu	Confidential
Rahui	Regulated
Wairua	Spiritual, spiritual dimension
Karakia	Prayer, ritual

### **Indigenous Māori society**

Indigenous Māori make up about 15% of the total New Zealand population of 4 million, with about 80% of all Māori now living in urban areas. Contemporary Māori represent themselves as having values, status, and responsibility acquired through their links to their ancestors. While Māori are fully assimilated into New Zealand society, and equal under one law, they also like to express themselves as having a different set of views and perspectives based on a distinct indigenous culture, where beliefs, knowledge, values, and aspirations may digress from those of the mainstream population. Ancestral lineage (whakapapa) provides an origin and a common bond for all Māori, linking them to each other and to the environment. It is this genealogical web that provides the basis for a point of difference and Māori societal structure.

The basic tenets of traditional Māori society remain strong alongside more contemporary groupings, beliefs and values (Tables 4 & 5). Māori terms are commonly used in planning, business and enterprise (Table 5). Contemporary and traditional values influence the way Māori conduct themselves, have tribal status and authority, relate to each other, manage, organise and address issues, and collaborate with other individuals and agencies. The challenge for Māori is how to balance aspirations for cultural enrichment, retaining strong elements of traditional culture such as values, language and knowledge, with those more modern elements of advancement, growth,

commerce and economic development. These challenges are being met in many areas by a large number of Māori groups and organisations, where capacity building, planning, and leadership are essential ingredients. The case studies in section 6 are testimony to the importance of Māori culture in contemporary Māori business. It is often reflected in custom and protocols, strategic planning approaches, behaviour, ethics, social responsibility and environmental standards.

### **Māori business**

Part of this research was also to define what constitutes a Māori business. This has been defined in many ways by many authors. At the Maunga Ta Maunga economic summit 2002 in Hawera, New Zealand, Mason Durie presented an interesting way of looking at Māori business and gave six guiding principles from the perspective of Māori development, focussed at establishing any Māori-cultural business (Durie 2002). He asked whether a Māori business could be distinguished from any other business. The following criteria are currently commonly used to define a Māori business:

- Māori operate the business (but really no other differences)
- Māori own the business
- A Māori style of governance and management
- Employs Māori staff
- Focus on Kaupapa Māori

Durie proposed an alternative over-arching criterion – the business’s contribution to Māori development and advancement. “Does it return dividends to Māori, either through profits or services, does it affirm a Māori cultural identity; does it create employment for Māori, does it create Māori wealth in economic terms or in terms of human capital?” He proposed six outcomes that would identify a Māori business when viewed from this perspective:

- makes a substantial focused contribution to Māori development and advancement
- is part of a Māori network, whether it be with Hapū or roopu or community
- adopts Māori values in both governance and management
- is geared to Māori realities and recognised Māori diversity
- creates choice for Māori consumers
- adopts principles and goals that give shape to a Māori business ethic

Acknowledging there is no exhaustive set of principles for Māori business and that these businesses cannot ignore established global commercial principles, Durie recognised that for such businesses to be effective nationally and internationally, they must operate in a bicultural way. He gave six guiding principles that have gained “a measure of agreement” amongst iwi and Hapū:

- The principle of agreement – **Tuhono**
- The principle of transparency – **Purotu**
- The principle of balanced motives – **Whakaritanga**
- The principle of integrated goals – **Paiheitia**
- The principle of best outcomes – **Puawaitanga**
- The principle of alliance – **Kotahitanga**

**Tuhono, the principle of agreement and alignment** suggests a Māori-centred business will be aligned with Māori aspirations and will involve substantial consultation with other Māori.

**Purotu, the principle of transparency** suggests Māori business will be responsible not only to its funders but also to the wider Māori community who are its stakeholders.

**Whakaritanga, the principle of balanced motives** acknowledges that, beyond the profit motive, there are other culturally based motives such as the heritage motive (for land- and sea-based industries), as well as social and political motives that must be balanced through wise governance.

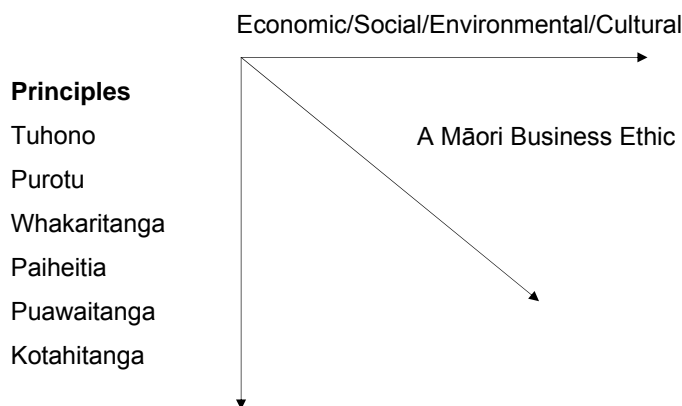
**Paiheitia, the principle of integrated goals** outlines the need for good management to manage the range of diverse goals even when there is an element of conflict between them. It rejects the single over-arching goal and the single measure of the accounting “bottom line”.

**Puawaitanga, the principle of best outcomes** suggest the “best possible return” for shareholders and beneficiaries must take into consideration the wider social, cultural and even broader economic perspective by endorsing the use of multiple measures.

**Kotahitanga, the principle of unity and alliance** encourages Māori to foster a spirit of cooperation rather than of competitive isolation and fragmentation of effort, to consider the benefits of economies of scale through alliances and joint ventures, leading to greater product range, better employment, higher levels of capital investment and the opportunity to capture niche markets.

Durie presented a framework (Figure 1) by which a Māori-centred business could gauge how it measured up to incorporating a “Māori Business Ethic”. One dimension relates to goals – economic, social, environmental and cultural (the goals for Māori development and advancement). The other evaluates the six guiding principles for a Māori-centred business/organisation.

### **Goals for Māori advancement**



**Figure 1.** A Māori business framework to measure Māori values and outcomes (Durie 2002)

The Hawera paper challenges the idea that Māori must adapt to the “conventional business environment”, and argues instead for Māori to adapt the general business model to “reflect the Māori position rather than confusing the Māori position” (Durie 2002; Cash & Taurima 2002).

The framework proposed by Durie (2002) makes a substantial contribution to improving the way we characterise or define a Māori organisation or business and provides a method to measure and monitor that contribution in reference to Māori development and advancement (Cash & Taurima 2002). The framework is also relevant for other indigenous and ethnic cultures. The guiding principles help ground the concept of “Māori centred” business in relation to Māori development. The ethical framework enables Māori enterprises to “map” strategically where they stand currently and where they might wish to go. Both also provide bicultural researchers with useful tools for the co-exploration of bicultural ventures. Durie’s work challenges the “standard business model/ethic” at a time when “single bottom-line measure” is being questioned and new approaches such as the triple (3<sup>rd</sup>) and quadruple (4<sup>th</sup>) bottom line performance reporting are being increasingly favoured. In its range, it presents an ethic (“Māori advancement”) that appears, developmentally speaking, clearly superior to current “policies-in-use” in New Zealand (Cash & Taurima 2002).

---

## 4. Māori Economic Development

---

Māori economic development takes place within the New Zealand economy (NZIER 2003; Business and Economic Research Ltd. & FOMA 1997). Any increased opportunities for Māori, and all Māori development and advancement through areas such as knowledge generation and use, education, innovation, and enterprise, make major contributions to the New Zealand economy and to New Zealand society. Te Puni Kōkiri, the Ministry of Māori Development, produced a report *Māori In the New Zealand Economy*, in 2002 (Te Puni Kōkiri 2002). The project was undertaken to gauge Māori involvement and contribution in the New Zealand economy, and to provide a snapshot in time and a baseline for future trends. The report highlights successful enterprise and innovation within a cultural context.

It is very difficult to distinguish and quantify the Māori economy as a separate entity from the wider economy as the two are interconnected, with constant flows in both directions (NZIER 2003). Māori are assimilated, along with business, into the general population. These reports identify that Māori economic development and potential have markedly improved since 1992, after a sharp decline between the mid-1980s and 1991, and that this economy is emerging steadily within the wider New Zealand economy.

The Māori economy is defined as assets owned and income earned by Māori – including collectively owned trusts and incorporations, Māori owned businesses, and service providers. The Māori commercial asset base, reported to be worth \$5.2 billion in 2000 (Te Puni Kōkiri 2002), was concentrated in farming, forestry, fisheries, and agriculture; and as at 2002, Māori organisations controlled 10% of New Zealand's forestry holdings. Estimated value of Māori exports was \$650 million from statistical data in 2000 (NZIER 2003) and the Māori economy contributed around \$700 million or 7.4% of New Zealand's total annual agricultural outputs. In 2001 the total annual tax contribution from the Māori economy was \$2.4 billion (NZIER 2003) and Māori were lenders to the New Zealand economy. For some Māori businesses and enterprises this commercial asset base is growing rapidly and becoming a major part of local and regional economies. The number of Māori businesses such as tourism, food and beverage, and fisheries, has increased sharply in the last 10 years. However, Māori continue to be greatly under-represented in most knowledge-based industries (NZIER 2003).

Within the Māori economy Māori can express their collective interests and aspirations. It is the space where cultural and economic aspirations combine. It is important to increase Māori participation rates in the New Zealand economy across a range of sectors through initiatives that include partnerships and joint ventures. Areas with an enormous potential for future growth include converting assets and intellectual knowledge capital into innovative, enterprising, and commercial activities within a robust cultural or tikanga framework. It is commonly believed greater economic development within the Māori collective will also strengthen cultural identity, wellbeing, and *tino rangatiratanga*. Many international examples also show that economic success and wellbeing allow cultural groups to reinforce strong environmental and cultural values and standards in practice.

We explore in the case studies in Section 6 what it means to be a Māori business in New Zealand and the importance of Māori values to those businesses.

---

## 5. Values and Branding

---

Branding is a relationship rather than a statement and is used to differentiate an organisation, product, or service from the rest. It includes visual imagery, text, iconography, symbols, graphics, metaphors, and any media a company is using and associating with its products, services, or organisation, to create a point of difference, unique qualities, a statement of identity, respect, a standard, ethics, or values in the market place. Branding has been an evolutionary development through time (e.g., 1000s-yrs), from products, to trademarks, to brands, “each step has brought consumers closer to the businesses that produce the goods and services they need” (Roberts 2003). “Brands were developed to create differences for products that were in danger of becoming hard to tell apart” and “a proven way for companies to capture and exploit their innovations” (Roberts 2003). Trademarks, copyrights, symbols, images, and patents are all important ways of protecting intellectual property associated with branding and are therefore significant issues (Appendix 5). At an organisational level, branding, differentiating, positioning, and promoting a business from the rest is increasingly used to reflect the identity, values, qualities, ideas, innovation, and standards of a company or business. For this research, results to date show there is a growing body of anecdotal evidence that overseas markets are responsive to cultural distinctiveness such as Māori branding. We make a distinction in this research between branding an organisation with a distinct identity based on a certain set of values, and branding a product or service. We discuss results in the case studies and conclusions section based on this distinction.

We are moving from a world of selling (establishing and satisfying the customers needs) into a world of buying (where people select your organisation over others because it better matches or fulfils their values) (Henderson & Thompson 2003).

Whereas in the past an organisation might have relied on its brand values to influence and manipulate the market and sales process, the organisation itself and what it stands for is now a significant factor in purchasing decisions (Henderson & Thompson 2003).

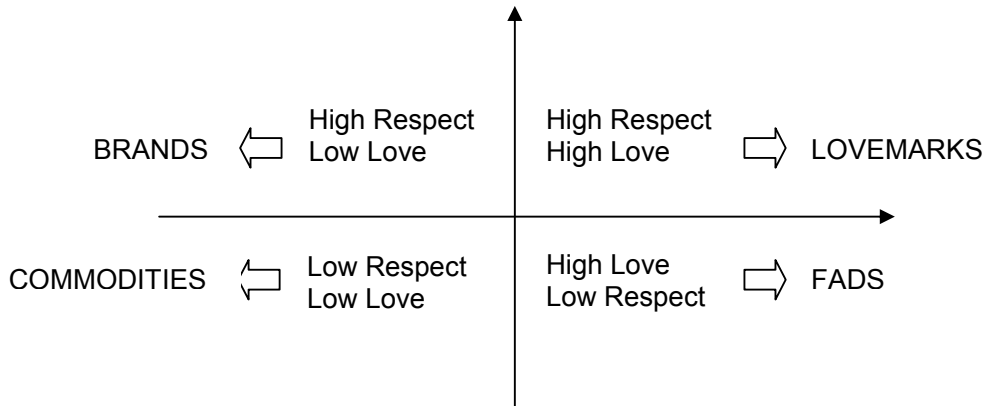
Executives of large well-established companies, typically talk about protecting their companies’ reputation or brand, whereas entrepreneurs are understandably more likely to talk about building a reputation or brand (Paine 2004).

Product branding can be divided into many different types. Three main types of branding are (Denise Conroy and Christina Lee *pers. Comm.*):

- Descriptive (e.g., Colgate toothpaste, cleaners, adhesives)
- Emotional (e.g., Ferrari, Porsche, Lotus)
- Iconic (e.g., Harley Davidson, Coca Cola, Nike, Adidas)

Branding and values are often inseparable, and people in the marketplace often construct the brand as well as the originator, until the brand becomes symbolic of a set of values or a co-creation of meaning (Denise Conroy and Christina Lee *pers. Comm.*). Some brands relate to product, some to tradition, while others represent an experience or a movement. Kevin Roberts CEO of Saatchi & Saatchi illustrated the evolution of branding as a journey through time, from products to trademarks, and then from trademarks to brands (Roberts 2003). Because of the information clutter, the large volume of branding now around the world, increased competition, rising consumer expectations, and technology shifts, Roberts sees the need to move beyond branding “to make the world a better place”, “to focus on making consistent, emotional connections with consumers”. Roberts suggests “human beings are powered by emotion, not by reason” and cites “the essential difference between emotion and reason is that emotion leads to action while reason leads to conclusions” (Roberts 2003). He describes a future beyond branding that is built around emotion, inspiration, innovation,

and forming special relationships with consumers and uses a useful four-axis model to describe this (Figure 2). The top right in the model are the high respect, highly loved brands known as lovemarks (e.g., Coca Cola, Guinness, Google, The Beatles, Lego, iPod, Ethnic Food – Yorkshire pudding) while bottom left are low-love, low-respect commodities and products. A brand is illustrated as high respect, low love, while a fad is high love, low respect. Many of the iconic brands (mentioned above) sit within the lovemark part of the model. This model created by Kevin Roberts is strongly related to brand equity and can be regarded as degrees of branding within culture and society. A lovemark therefore has a very strong set of values attached to it. Once a brand is established, brand equity can be built and can last for years, decades or even generations.



**Figure 2.** A four-axis model describing the relationship with brands (Roberts 2003).

Generally speaking, iconic brands have very high-brand equity, while a commodity or product has a low-brand equity. The brand often becomes a symbol of the organisation that creates the brand, and people often attach values to that brand that give it equity through monetaristic, cultural, and emotional value.

John Elkington, author of *Cannibals with Forks* (Elkington 1997), discussed the nature of early adapters in relation to a number of changes in society and business. Elkington developed a model and S curve to illustrate how value shifts are driven initially by innovators and early adapters and move through stages. Elkington suggested that among the values most likely to move up the S curve over the next few decades are “responsible consumerism, business ethics, environmental justice and inter-generational rights”. Based on this model, he predicted underlying shifts in values of organisations and consumers as outlined in Table 6.

**Table 6.** Emerging values in the 21<sup>st</sup> century (Minessence Group; Henderson & Thompson 2003).

Emerging values		
Global consumer 1990s		World citizen 2000s
Me		We
More		Enough
Materialism		Holism
Quantity		Quality
Greed		Need
Short term		Long term
Rights		Responsibilities



Elkington wrote that as a result of this future values shift, “the new agenda for business will increasingly revolve around values and ethics. Successful companies will be better at identifying understanding, and responding to the values of those they work with and serve”.

### **Māori values and branding**

Māori values, images, and branding have been around for centuries. We have researched the role of branding in contemporary Māori organisations as part of developing an organisational culture (based on values and principles) and determining – through case studies and interviews – the need for indigenous branding of products and services.

The results of this research show Māori branding is being used to differentiate a Māori business more carefully from other branding, by defining its organisational culture, operations, products, services and aspirations. A number of reasons for indigenous branding are examined in this research:

- Pride in being indigenous Māori and wanting this communicated
- Creation of a distinct organisational culture and set of values (and principles) for the business
- Alignment of organisational values with those of shareholders, constituency, or a community
- Creation of a unique value added product
- Product is attached to a set of traditional values
- Establish a point of difference to other products and businesses
- Responsibility and obligation to ancestors and descendants
- Self belief in doing something the right way – tikanga – living indigenous; that branding an organisation based on traditional values and concepts provides fundamental principles for living now and into the future

Many Māori organisations wish to demonstrate their values so they can “guide their own destiny and create for themselves a sustainable competitive advantage”. Indigenous branding requires commitment and should not be taken lightly, as it would soon be recognised by constituencies and global audiences as piecemeal and superficial. Within a Māori organisational framework, if traditional values are adopted they need to be taken seriously and to be fully understood. The key is translating values into actions, and implementing and reporting on those actions.

To develop an indigenous brand, logo, or icon, indigenous branding needs to be carefully discussed and planned. It should follow established protocols, guidelines, and processes. The process of steps, iterative discussion and evaluation, leading to results, may take months or years. Below is a simplification of what is involved in a branding approach used by Wakatu Inc., developed by their projects manager, Ropata Taylor. Wakatu Inc. is advanced in establishing indigenous brands on a regular basis, and in particular with the iconology of logos. The following basic steps are followed by Wakatu Inc. when developing new icons for a brand are:

- Agree on the ancestral values to be reflected in the logo, inherent to the product
- Select symbols appropriate in the expression of the agreed values, such as koru or niho taniwha (triangles), etc.
- Incorporate any significant colours central to either the values or the product, e.g., red representing tapu
- Select font for any text to compliment icons in balance, impact and simplicity
- Establish a focus group to review logo against branding objectives, e.g., target market, indigenous integrity, aesthetic appeal, etc.
- Introduce to marketing team, importers, distributors, retailers
- Market test for consumer responsiveness
- Agree to adopt changes and proceed

---

## 6. Case Studies

---

### **Māori values in the Māori business approach**

Objective 3 “Māori values in the Māori business approach” began in October 2003. The key focus of the objective is researching the role Māori values play in branding, setting cultural standards, ethics, and protocols in business, and planning sustainable development. The research investigates the incorporation and use of traditional values in contemporary Māori business, the strategic planning of businesses, the need to set benchmarks and standards in business performance and how those are measured, barriers or disadvantages in being a Māori business, indigenous branding, and intellectual property right issues associated with branding products and services. Results will be used to indicate the way in which Māori businesses can position themselves as unique players in the market place, set cultural standards, and apply traditional principles to increase sales, especially in exports. The research uses a case study and interview approach with a number of successful Māori businesses around the country. Case studies began in March 2004.

### **Objective statement:**

Identify how Māori companies integrate their unique cultural heritage into their business approach and both communicate and protect that point of difference in global markets. That is, how can Māori businesses achieve a sustainable competitive advantage based on unique cultural dimensions of governance and performance? Within the target business sectors we will analyse case studies of the implementation of Māori traditional principles into ways of doing business. For example, surveys will address:

- Which Māori principles have been incorporated into business practice?
- Through what means have principles been incorporated? (e.g., statements of business vision or strategy, development of products and services, interaction with stakeholders, etc.)
- Have businesses adapted traditional western business models or created new models based on Māori principles?
- Where western models are adapted, what shortfalls or tensions arose and how were these addressed?
- What measures of corporate success have been adopted by Māori businesses incorporating traditional principles?
- How these measures compare to western standards of corporate social and environmental performance?
- What forms of IP protection have been implemented by Māori businesses in the area of cultural heritage?
- What have been the successes and failures?

### **Case studies**

A number of case studies of Māori businesses have been carried out to find how or if Māori businesses incorporate Māori values into their businesses and marketing – to identify how companies integrate their unique cultural heritage into their business approach and communicate and protect that point of difference in global markets. Seven Māori business case studies have been documented and results are presently being analysed and evaluated:

- Tohu Wines Ltd. (Lower Hutt) [www.tohuwines.co.nz](http://www.tohuwines.co.nz)
- Wakatu Incorporation (Nelson) [www.wakatu.org](http://www.wakatu.org)
- Biofarm Products Ltd. (Palmerston North) [www.biofarm.co.nz](http://www.biofarm.co.nz)
- Ngai Tahu Seafood Ltd. (Christchurch) [www.ngaitahu.iwi.nz](http://www.ngaitahu.iwi.nz)
- Shotover Jet Ltd. (Queenstown) [www.ngaitahu.iwi.nz](http://www.ngaitahu.iwi.nz)
- Team Logistics Ltd. (Christchurch) <http://www.teamlogistics.co.nz>
- Whale Watch Kaikoura (Kaikoura) <http://www.whalewatch.co.nz/>

## Case study 1 based on an interview

**Organisation/business: Tohu Wines Ltd**

**Interviewee(s): James Wheeler (CEO) Tohu Wines**

**Interviewer: Garth Harmsworth**

### Background

Tohu Wines Ltd was the first indigenous wine company to export high quality wines from New Zealand and was established in 1998. It is a joint venture company with Wakatu Incorporation, and partners Ngati Rarua Atiawa Iwi Trust (NRAIT 1993) northern South Island (Te Tau Ihu) and Wi Pere Trust (1899) Gisborne. The idea of Tohu wines initially started in the early 1990s following discussions with Wakatu Incorporation. Products at the time were apples, pears, and kiwifruit growing on Māori reserve land and commercial properties. The New Zealand Apple and Pear Marketing Board carried out all the branding and marketing in those early years – we had no control over product branding and marketing. We started to research the wine industry in the mid-1990s to identify the strategies needed to develop a business in New Zealand and overseas. There was a growing market for wine both here and internationally. In these early years we were helped by Trade NZ and a focus group was set up to look at the USA as a key market – we then decided to focus on international marketing.

Wakatu Inc. wanted to grow, produce, and market world-class wines under a brand name, finally agreed as Tohu Wines. We started by putting our toe in the water, “How could we export our culture around the world?” and knowing that Te Tau Ihu is the best region in the world for wines like sauvignon blanc. Could we put our culture on the front and tell our story by exporting a quality product? At the time we wanted partnership with other Māori wine growers, and the Māori wine groups, NRAIT and Wi Pere Trust (with 20 years experience growing wine in Gisborne and Martinborough), became our partners.

Tohu Wines now grows, produces, and markets world-class wines. 80% of our wines are exported. We produce a high-quality product of world standard, and we market to top quality restaurants and to international markets. Tohu Wines won a Trade New Zealand export award in 2003, and the 2002 Sauvignon Blanc received a four-star rating from a leading UK wine magazine, *Decanter*. The present land area now planted in grapes is around 112 hectares, with more grapes being planted. Tohu produced 3500 cases in 1998, rising to 28 000 cases in 2003, and 116 000 cases are planned for 2007.

We have a small number of staff, <10 directly involved in the company, but a large number of vineyard staff and seasonal workers. The Tohu brand and assets are valued in excess of \$30 million, and land prices are increasingly valued in the millions.

In New Zealand we aim at the high end of restaurants. Internationally we export to: America – USA, Canada; Europe – the United Kingdom, Ireland, Denmark, Netherlands, Sweden, Germany, Belgium, Luxembourg; in the Pacific – the Cook Islands. Future markets being developed in Australia, Italy, Russia, and the Czech Republic.

Tohu Wines’ vision is to be the premiere Māori export company in the world, specialising in wine. Its mission is to:

- produce and market wines of a world standard
- be outstanding in everything that we do
- nurture our whenua, staff, customers, and owners
- be a successful example of New Zealand’s unique indigenous culture

### **Recognising Māori values in business**

First and foremost we are a wine company, and second an indigenous company. We were the first Māori wine company in the world. However, the most important part of our business is 1) having a quality product, 2) being New Zealand, and 3) being of indigenous culture. Tohu is distinctly Māori and proud to be an indigenous company. We are wholly Māori owned and produce high-quality products. This point of difference separates us from other wine companies.

Being an indigenous extended family (whānau)-based company is absolutely important. We have to be successful for the whānau, as they are our shareholders. Our focus is to look after and give a return to whānau, “To nurture our whenua, staff, customers, and owners”. How we treat staff and employees, how we carry out decision-making, is part of our values as a company.

The company follows a composite business model with elements of western financial systems blended with cultural values and principles, giving the company robust financial integrity, economic performance and quality, integrated with cultural protocols and values (tikanga). The day-to-day operations involve accountability, success, profits, financial prudence, and marketing – all within the cultural or tikanga framework in which we operate. It is the tikanga that sets the ground rules for our operations, and establishes who we are (e.g., responsibility to whānau, family members, sustainable wine growing, way to achieve best practice, etc.).

The business is built on key principles such as consensus decision-making, achieving quality, high standards, sustainably managing resources, sustainable development, along with key cultural values and principles such as whānaungatanga, kaitiakitanga, and manaakitanga. We have a responsibility to our whānau and to all Māori to succeed, prosper, and maintain cultural integrity. We help communities by providing employment, training, education grants, and caring for the land. Our business is built on sustaining natural resources through cultural practices such as kaitiakitanga, using Māori and environmental principles to look after the environment, to care for the land, the whenua, through good practice and sustaining natural resources like soil and water. Examples include planting native trees on our land, especially in steeper less-developed areas, or in culturally significant areas, or respecting the wishes of our shareholders, our whānau, to retain culturally significant areas of land.

All national and international marketing for a Māori or indigenous brand needs to be carefully controlled and professionally marketed by each company. Tohu tells its story to the world through the label and the name Tohu, marketing our brand as an indigenous quality product to the world. The main reasons we see for indigenous branding are to make the product unique, to be proud of our Māori culture, to add value, and to associate the product with quality and excellence.

### **Strategic direction and sustainable development**

Our business strategy is not just about making profits. All companies have to make a profit and be accountable, but not at any cost. Other values have to be considered and other factors often need to be weighed up, such as those related to the extended family (whānau) and the environment (papatuanuku, whenua).

Social, environmental, and economic goals and standards are all important to Wakatu, not just the making of profits. We feel we have a responsibility as one of the biggest companies in the region. We believe we are socially responsible; we share and distribute the wealth of the company back to the wider community in many ways. More directly, money goes into creating employment, and it also goes into education – each year 25 educational scholarships are awarded. Other socially important areas are delivering training programmes that build the skills of people associated with the company. Training leads people back into employment, and into the industry, and those whānau and other members receiving training can become skilled and can contribute professionally to the wine industry.

There are no real tensions or conflicts between using a western business model and those based on Māori or indigenous approaches to business. However, many other factors need to be considered and weighed before problems or conflicts arise, e.g., cultural concerns, such as customary access and rights, are important. Cultural and ethical standards always have to be considered, e.g., some areas of land are so culturally significant they cannot be sold or developed in the same way and shareholders would often refuse to sell. We need to separate land that is culturally significant (for shareholders) from land that is not, so we can focus on land for economic development. Most developments need to go through to the shareholders before a plan is approved or endorsed. In many culturally significant areas we use a cautious approach to earthworks, housing or building development, subdivision, and construction, especially where there is evidence of archaeological sites, artefacts, and cultural values.

We usually measure company performance using common fiscal factors, and are interested in using other forms of measurement such as triple bottom line reporting. We are also interested in using methods that measure our social and environmental performance.

Tohu are adopting a sustainable development approach to business and believe that underpins the business through adherence to good practice and sustainable management of the land (whenua). The vineyards have to be sustainable – it is our main concern. If we don't look after our land (whenua), we can't grow our wine, and then can't provide a return to whānau shareholders.

### **Authenticating values**

Māori values are a part of us, as people. They affect the way we relate to others, the way we carry responsibilities, and the way we make decisions, etc. Values can be translated into actions in many ways. We try to balance business with the responsibility of family expectations and the need to be a successful company. We are still very much profit driven because we have to be. Māori love success – just like everyone else. We hate failure, and we can't let people down.

So there is a huge responsibility not only to us as a business, but also to meet family and shareholder expectations. We spread our profit back through whānau, through family, cousins, etc. We take cultural factors into account, very seriously. The way we balance everything is in terms of what we can give back to shareholders and whānau, and what we give back to the whenua (land, earth mother) – as we say in our mission statement.

We have a commitment to Māori, to iwi/hapū, to shareholders. I love working for the whānau. I have been on the Board of Wakatu for several years. I have a commitment to be guided by my grandmother and do the right thing, and they have been the best years of my life. It was very interesting being involved in a company with so many sector industry interests, including forestry, crops, aquaculture, and property. I'm also very much focussed on wine.

### **Processes and standards**

We have many processes in place to authenticate Māori values and philosophies. We work within a tikanga framework, guided by cultural protocols, but on the cultural side while nothing is formalised or documented it is expected by the whānau, the shareholders. We also follow an integrated wine standard – viticulturalist – checklist of environmental standards. Our management fits with the IWP programme. We have to be a successful company and operate within both environmental and cultural guidelines. There are things we can do and things we can't, e.g., the use of sprays in our vineyards is controlled by strict standards.

We work towards a quality regime attached to anything Māori. A Māori business should have a robust set of cultural standards, possibly delivered through a company business plan. We aim to be a successful Māori business, so it's a big circle to achieve a certain level of success and set our own cultural standards to achieve this. This is entrenched in our business plan, our vision and mission

statement.

I am confident the Māori community, iwi, hapū, would support our statements on cultural values and authenticity. Yes, we follow standards and respond to the high expectations from our shareholders, who keep us honest. They support our professional standards and we provide them with much of the business performance information through hui, reports, and our web site. We work on their behalf and we have to be successful for them. But we have to achieve success first, and maintain high standards in our products such as wine and food, comply with standards, and be successful financially to deliver back to people. Tohu and Wakatu have a strong set of values.

### **Barriers/advantages**

I don't see incorporating Māori values and principles into business as a barrier or limitation for our business. We need to balance it; cultural values and rules such as tikanga tells us – and tikanga can be regarded as a code of conduct. You certainly get told by Māori shareholders if you do it the wrong way! Tikanga of Te Tau Ihu iwi is our guiding philosophy.

I believe our business provides huge benefits: a high-quality international wine generates good profits and dividends for shareholders, we create much needed employment, and we provide educational scholarships and training. We are proud of being a successful Māori business and being a model to other groups.

A Māori business can achieve competitive advantage based on the unique cultural dimensions of governance and performance. However, if we had had a greater asset base and just gone the western way, we might have been more profitable. Sometimes we have some hard options to make. There are some natural resources and land that we haven't developed, as a result of family (whānau) advice; and we have managed land and resources in some areas based on guidance from shareholders and whānau that have costed more to develop. But we have to think about the cultural/social factors as well. By focusing solely on profits and not listening to whānau we could have made more money but would have made decisions against tikanga/cultural protocols. We have to think about tikanga and family values as a Māori business.

### **Intellectual property issues**

Intellectual property (IP) of products and services is a very important consideration for Tohu wines. The name Tohu is trademarked. We are making a stand with our branding in Europe and have trademarked Tohu Wines Europe Ltd for use in European Union countries.

The main IP mechanism we have in place is the Tohu trademark. It is a very costly exercise to trademark and protect a brand – in the vicinity of NZ \$15,000 for a period of about 10 years. Patent Attorney costs are tens of thousands of dollars.

The main forms of IP protection for cultural heritage and traditional knowledge are through cultural practice (tikanga). We have gone to great lengths to make sure our stories are meaningful and accurate. The Tohu trademark means our cultural stories should be told properly and accurately. Much thinking goes into developing a name that means something, and this is our knowledge. Tohu means a signature, sign and mark. It indicates a direction in which we want to go, and provides connection with our people.

### **Acknowledgements**

This work was carried out under Objective 3 of the FRST programme “Māori Business branding: achieving competitive advantage in global markets”, short title “Waka Tohu”. Interviews were carried out in March 2004. We are indebted to Tohu Wines, and thank James Wheeler, Chief Executive Officer of Tohu Wines, for his time and invaluable inputs into this research project. The Tohu wines web site is at: [www.tohuwines.co.nz](http://www.tohuwines.co.nz)

**Interview complete**

This manuscript represents a full and honest summary of all my interview comments made on (date):..... and I have been given the opportunity to limit, change or highlight any personal statements before release or publication of these research findings.

Respondent

Signed.....Date.....

Interviewer.....Date.....

**Case study 2 based on an interview**

**Organisation/business: Wakatu Incorporation**

**Interviewee(s): Ropata Taylor (Project Manager) and Lucy Cruickshank (Brand Manager), Wakatu Incorporation**

**Interviewer: Garth Harmsworth**

**Background**

Wakatu Inc. is a multi-sectoral business with a national and international focus and large and increasing involvement in branding and international marketing. It is Māori owned and proudly a Māori business of the land and the sea. It has 5 main sectors with investments in: aquaculture, fisheries/seafood, wine, horticulture, forestry, commercial property and developments, and increasing expansion into both tourism (new) and exporting. It has 6 subsidiary companies and 7 joint venture companies. The business in New Zealand is medium to large with just over 400 staff. After substantial growth in the last 10 years the asset base is now between \$140 and 150 million with annual profits around \$4.5 million. About 90% of Wakatu's products are exported to international markets, the biggest including USA, Australia, UK. Other markets that are becoming increasingly important include Canada, Switzerland, South Africa, France, India, Ireland, Spain, Hong Kong, Korea, Japan, China, and Germany.

There is strong vision for the company in the next 10 years and beyond – to grow the economic base and achieve social and cultural goals. Tourism will be a new focus for the company, and we will also expand the area of Wakatu merchandising. Strong communication and networking lines have been established, and supporting other Māori exporters with an indigenous trade channel is important to us. Our land estate can only grow, which is what we want to achieve.

**Recognising Māori values in business**

Wakatu Incorporation is unashamedly a Māori business. It distinguishes itself from a non-Māori business with a strong sense of cultural identity and being owned by Māori shareholders. Corporate support is given to the promotion of Māori values. Staff are a mix of the most professional Māori and non-Māori working together to succeed. Profits are not just the sole measure for success – “we (Wakatu) measure our success in other ways”, “we are not always trying to get the greatest yield on an asset”. Shareholders have an emotional attachment to Wakatu Inc., and the company represents their lifeblood, their ancestry – everyone is emotionally tied up in the business. “People are the most important part of our business – they have to be proud of it”.

We care that our cultural values are maintained and have merit within the operational structure of our organisation. Our values have to be meaningful, which validates our cultural identity in our business. “Holding onto land is very important to Wakatu, growing the estate, holding onto and looking after culturally significant land. Ownership, control, and retention of land are very important”. However I think there is more pressure on a Māori business to perform and achieve, ‘it is not a level playing field’. We are under the spotlight all the time, both the New Zealand public and Māori. We are accountable to our own people and need to demonstrate cultural integrity,

honesty, financial accountability, and success. We have to operate at a very high standard; we have to be transparent and successful. There is probably more pressure on this company and the staff to perform than a normal company.

Being Māori and indigenous is of the utmost importance to Wakatu. This is our point of difference from other organisations – this is what makes us unique, special. The foundations of our organisational values are on strong Māori cultural principles.

Our business follows a modern western business model but is based on tikanga or cultural values. Traditional values and principles are integrated or entrenched through all aspects of our business, at all levels. Tikanga gives us our policies and procedures. Whakapapa, our ancestral lineage, is there by right. Tikanga and Māori history are very important to us, as are responsibility, respect, honesty, integrity, redistribution, and reciprocity. Some of the key cultural values and principles include: whakapapa, whānaungatanga, rangatiratanga, mana whenua, mana moana, kaitiakitanga, manaakitanga, awhinatanga, kotahitanga, mauri, wairua. These are traditional cultural principles based on our ancestry and form an important part of the way Wakatu operates.

Our Māori shareholders let us know when they don't like something or when they feel it doesn't adequately follow cultural values. Our shareholders are at the top and management and staff are below, not the other way round. We also have strategies to take into account mauri, tapu and noa. Our web pages about our business provide some of this information on cultural values (tikanga). We don't believe there should be a distinct Māori or indigenous brand marketed nationally or internationally. Each brand should be developed and controlled by a company or business. Wakatu has its own guidelines in place. We have our own indigenous brand (one of the first indigenous brands in the world) – Kono: our gifts from the land and sea, "Hua a te whenua me te moana". The key purpose of Kono was to leverage distribution channels from one product and apply it to another. "Kono is now being used to sell our fruit, our seafood, wine and spring water. The brand has taken many years to develop. We developed this under a strict and comprehensive cultural process, and a large number of procedures/steps were followed. There is no need for other support structures, because we operate the business ourselves and use collaborative marketing to position the brand. Once the Kono brand has been established among our own companies we will allow some other Māori groups to use the brand, under certain controls, by leveraging on our brand equity and relationships. For this to be considered, strict quality and cultural standards must be in place.

Retaining control over an indigenous brand is extremely important to us and represents a lot of hard work to achieve a brand associated with quality, values, and integrity. It is also important to establish a unique brand that will add value to products. It is a concern that too many indigenous brands could be detrimental to the market. In future we are interested in adding a cultural component to our company reporting: to report on social, cultural and environmental achievements, such as using triple bottom line reporting or as part of an environmental management system

### **Strategic direction and sustainable development**

The strategic direction of Wakatu is not just about making profits – many other areas are important to us. We have a responsibility to achieve social, environmental, and cultural goals and sustainable development. We will be exploring and developing systems to measure, monitor and report our performance in these areas. This also gives substance to the brand, in the way you measure what you are doing and reporting on it.

We are achieving these goals through programmes in education, scholarships, training, sponsorships, and strategies to help increase employment through our successful sector businesses.

We set very high standards, and these responsibilities are taken very seriously.



We don't see any conflict between using a western business model along with Māori or indigenous approaches to business. We believe we have succeeded in integrating the western business model with cultural practices and Māori values (tikanga).

We are adopting an absolutely sustainable development approach to business: that is the way we operate. For example, industries such as aquaculture, wines, crops, are all focused on replenishing the resource, making sure the resource is sustained for future generations, otherwise we don't have a business. We have an obligation to our whānau and shareholders to sustain natural resources for future generations. Principles such as kaitiakitanga are very important to us.

### **Authenticating values**

Māori values, principles, philosophies, underpin our business and are translated into actions in many ways, through many examples. Your culture is your worldview, and subsequently becomes the company's worldview, through our governance, our products, sector businesses, our marketing, our day-to-day business.

There will always be some difficulties in balancing business decisions with cultural considerations. Occasionally there are some tensions and conflicts surrounding some issues, but nothing that can't be reconciled, e.g., when making decisions to develop land or using natural resources, strategic plans, based on cultural values, are used to guide our decision-making. Shareholders ultimately determine what we can develop and what we cannot, and also how we should manage land, water and natural resources.

We are committed to working for iwi/hapū/whānau – they are our shareholders – it is the reason the business exists. This is what drives our business, the whānau/shareholders are at the top, next down is the board of directors, then the CEO, and then the staff. Behaviour and actions reflect the mana of the organisation.

### **Processes and standards**

To have the right processes and standards in place is strategically important at the governance level. We have many processes in place to make sure our values (tikanga) are followed and are authentic, including consultation, we talk to everyone who has an opinion, and planning filters down to all groups. A Māori business should have a strong set of cultural standards derived through a business plan.

In relation to compliance monitoring, business activities and performance need to be monitored continually. Internal checks are in place and cultural standards are followed. We also have to comply with a large amount of legislation. Constant checks are carried out to make sure our internal standards and performance from a cultural side, such as kaitiakitanga, and adherence to sacred sites (wahi tapu), are followed and whānau, shareholders, tangata whenua, are involved in the process on a regular basis.

The Māori community, iwi, hapū, would definitely support these statements and the portrayal of values and authenticity. The organisation cannot develop in isolation and the community/shareholders guide the incorporation.

### **Barriers/advantages**

We do not regard Māori values and principles in business as barriers or limitations. If anything they strengthen our business. Wakatu cares greatly about the region it is in, Te Tau Ihu (northern South Island), and about the benefits the company can bring to all people living in the region and in New Zealand. We have a vested interest in the community.

The whakapapa (ancestral connection) of our business is the same whakapapa of our stakeholders and this gives us direction. Stakeholders therefore have direct input into the planning and corporate direction of Wakatu Inc. The business benefits shareholders, Māori, the wider community in many ways, including: we are the biggest ratepayer in the region and one of the largest employers. A large amount of the financial returns and profit go back into the region. Mentoring other businesses, supporting the development of Māori businesses, developing entrepreneurial leadership are all important to us. Māori businesses can achieve competitive advantage based on unique cultural dimensions of governance and performance.

### **Intellectual property issues**

Intellectual property (IP) of products and services is a huge consideration for our business. After long deliberation and consensus we selected Kono as the main brand name for Wakatu; and that is what we are taking out to the world: it will be used to brand a large range of products. The Kono brand is being registered internationally and nationally. Registered names and brands are very important to us, especially with our move into international markets. The brand tells our story and reflects our cultural values – it gives meaning to our indigenous stories and the values behind the brand. So IP is very important. Sometimes the brand reflects the intangible. We have a comprehensive series of steps in place to select a brand, and a legal process is required.

The main IP mechanisms we have in place to protect business knowledge, products, and services are Trademarks, but registration is very expensive, around \$25,000, and has to be protected vigorously. We have to register our brand in every country selected under the food and beverage IP.

Strict controls are in place to protect our intellectual property, and cultural and traditional knowledge, e.g., our Wakatu land-plan, which shows all the land owned by Wakatu and identifies cultural significant sites that should be protected in perpetuity.

### **Acknowledgements**

This work was carried out under Objective 3 of the FRST programme “Māori Business branding: achieving competitive advantage in global markets”, short title “Waka Tohu”. Interviews were carried out in March 2004. We are indebted to Wakatu Inc. and thank Rōpata Taylor, Project Manager, and Lucy Cruickshank, Brand Manager, for their time and invaluable inputs into this research project. The Wakatu Inc. web is at: [www.wakatu.org](http://www.wakatu.org)

### **Interview complete**

This manuscript represents a full and honest summary of all my interview comments made on (date):..... and I have been given the opportunity to limit, change or highlight any personal statements before release or publication of these research findings.

Respondent

Signed.....Date.....

Interviewer.....Date.....

### **Case study 3 based on an interview**

**Organisation/business: Biofarm Products Ltd**

**Interviewee(s): Cathy and Jamie Tait-Jamieson (owners-managers) Biofarm Products Ltd**

**Interviewer: Nadia Kimberley-Ward**

#### **Background**

Biofarm Products Ltd (Biofarm) is a company that specialises in producing natural foods. It has been certified organic since 1986 and is the second oldest commercial organic farm still operating. Biofarm is also a registered dairy and processing storage facility sourcing raw milk from its own farm, the Organic Farming Company and also organic milk from Fonterra. The farm processes yoghurt and pasteurised milk products.

The Factory employs 5 full time/part-time workers. Two people are employed on a part/full time basis to administer accounts. There are 4 full-time farm staff and cadets, as well as the owners, Jamie and Cathy Tait-Jamieson and Neville Openshaw (Ngati Kahungunu).

Biofarm contracts 13 distributors throughout New Zealand to distribute their products into supermarkets, health food and service stores. Periodically Biofarm market their products internationally to Australia and USA to protect trademark registration.

At the end of August 2003 Biofarm had an annual turnover of \$2.5 million. The farm is valued at \$5 million. Other assets include the trademark, cows, factory plant and equipment with a combined estimate of \$0.5 million.

Biofarm's vision for the next 10 years is to be as sustainable as they were before the flood of 16 February 2004 and to have a succession plan in place.

#### **Recognising Māori values in business**

Biofarm regards their business as being Māori even though not all members of the business are Māori. Their reverence for papatuanuku (land and soil) and their treatment of papatuanuku as a taonga (treasure) underpins their business, and they believe this distinguishes it from a non-Māori business.

Being a Māori business gives them an immense sense of pride, which in turns gives mana to the business. It has given Biofarm an incentive to succeed, coupled with the fact that they are a non-typical dairy farming and processing business, and there have always been added external pressures, and expectations by others, that they would fail – especially inside the industry – because of their unconventional philosophy.

Biofarm uses a composite business model that includes elements of Māori culture, tikanga and western business. They do not experience any tensions or conflicts between using a western business model with a more Māori or indigenous approach to business as they believe the key to survival is improvisation – whakakotahitanga.

On the Māori side, we employ the philosophy of “taking from the past (Māori values) to carry into the future”, for example, using ancient Māori knowledge of cosmology and the more recent knowledge of our great-grandfathers who farmed the land and whose knowledge and records helped us to plan for and cope with damaging floods, such as those in February 2004. Our business operates within these natural environmental processes and cycles. On the western side, western business structures are used for adhering to legislation, standards, and compliance requirements, for example, the Hazard Analysis and Critical Control Point (HACCP) system, to ensure food-safety.

Respect, integrity, trust, kaitiakitanga and tino rangatiratanga are the key principles on which the business is built. These principles are traditional iwi Māori principles. Other values employed are:

- Whakapapa
- Whānaungatanga
- Manaakitanga
- Awhinatanga
- Wehi
- Taonga tuku iho

Māori values are vertically integrated into the organisational structure. They are incorporated throughout the business, from the treatment of soil to the animals in their care, from the people who are associated directly and indirectly with their business, to the products that have health benefits for their consumers.

Cathy believes that domestically there is only a small target audience for a distinct Māori or indigenous brand. If such a brand is to be marketed internationally, more research is needed to determine its value as an indigenous brand. Such branding would also depend on the market and the type of product. Cathy also thought Māori branding would be more beneficial to the exporters for their own networking and collective. Other benefits of this type of branding, she believes, are “improving the market niche, infusing pride into the product and making a statement of identity”.

### **Strategic direction and sustainable development**

Biofarm adopts a sustainable development approach to business. The strategy for Biofarm is not just about making a profit; it is also about achieving a sustainable environment and ensuring that the business is socially responsible and economically viable.

Biofarm takes a holistic approach to business and believes one element should not be compromised for another. They also view the business in the long term, which is to strive for organic growth, and not to focus on the peaks and troughs of the business cycle. Likewise, organic farming does not artificially boost pasture growth for profit; instead they concentrate on environmentally sound practices to provide friendly environments for people and animals to work and cohabit. The performance or success of their company is not determined solely by financial success, achieving agreed social, cultural and environmental outcomes are extremely important.

### **Authenticating values**

At Biofarm all people are treated like a whānau/family; most workers actually are whānau/family. Kaitiakitanga and whānaungatanga is practised by ensuring that the health of both the physical and spiritual dimensions of the people, animals and papatuanuku is nurtured. The soil/whenua/farm is without question regarded as a taonga tuku iho: the farm has been in the Tait-Jamieson family for several generations.

Knowledge is readily shared by the Tait-Jamieson whānau within the boundaries of intellectual property. A few examples of how they awahi and manaaki others are:

- Offering farm tours
- Mentoring like-businesses
- Offering on-farm cadet/training
- Nurturing children.

Biofarm recognise the principles of balance, diversity and interdependence that are important for balancing business, resource use, and environmental sustainability, based on sound cultural, social and economic principles.

### **Processes and standards**

Biofarm regularly undertake peer reviews, which, although informal, provide a means of checks and balances and a way to ensure they are upholding the values that underpin their business. They regard cultural standards as an integral part of the business plan.

### **Barriers/advantages**

Biofarm do not regard incorporating Māori values and principles into their business as a barrier, rather they see it as an asset. Biofarm benefit Māori by acting as a role model for a sustainable Māori business. They believe that in some niche markets Māori business can achieve a competitive advantage based on unique cultural dimensions of governance and performance.

### **Intellectual property issues**

While, intellectual property has not been an issue for Biofarm in the past, it may become increasingly important in the future. The Biofarm and Ecofarm trademarks are the only formal intellectual property mechanisms Biofarm use. Knowledge such as cultural heritage and Mātauranga (Māori knowledge), is not in written form, and only accessible in oral form from the owners.

### **Acknowledgements**

This work was carried out under Objective 3 of the FRST programme Māori Business branding: achieving competitive advantage in global markets”, short title: “Waka Tohu”. Interviews were carried out in March 2004. We are indebted to Biofarm Products Ltd and thank Cathy and Jamie Tait-Jamieson for their time and invaluable input into this research project. The Biofarm web is at: [www.biofarm.co.nz](http://www.biofarm.co.nz)

### **Interview complete**

This manuscript represents a full and honest summary of all my interview comments made on (date):..... and I have been given the opportunity to limit, change or highlight any personal statements before release or publication of these research findings.

Respondent

Signed.....Date.....

Interviewer.....Date.....

### **Case study 4 based on an interview**

**Organisation/business: Ngai Tahu Seafood Ltd**

**Interviewee(s): Gavin Holley (General Manager, Ngai Tahu Seafood Ltd)**

**Interviewer: Gail Tipa**

### **Background**

Ngai Tahu Seafood (NTS) is a wholly owned subsidiary of Ngai Tahu Holdings Group, which in turn is a wholly owned subsidiary of Te Rūnanga o Ngai Tahu (TRONT). This iwi’s tribal territory is defined in the Te Rūnanga o Ngai Tahu Act 1996 but in general terms includes approximately three-quarters of the South Island of New Zealand.

NTS is a one of New Zealand’s largest fishing and seafood companies with an annual turnover of approximately \$90 million. From small beginnings approximately 13 years ago, NTS now manages Ngai Tahu’s seafood interests, which includes abalone, shellfish, lobster and finfish. It is vertically integrated with a number of vessels owned through a joint venture with Pacific Trawling, processing plants and depots throughout Te Waipounamu and in Wellington. It is also a marketer, trading in the New Zealand wholesale market as Ngai Tahu Seafood Distributors, and in the retail

market as Pacific Catch, with outlets in Wellington and Auckland. The purchase of Globe Fisheries and Paua Supplies in 2002, and the 50% joint venture with Pacific Trawling has enabled NTS to strengthen its position in the New Zealand Seafood industry.

The company exports to most major world markets including North America, Europe, Australia and Asia, and has developed innovative high-quality products, e.g., an award at the 2002 International Boston Seafood Show for its Mussel and Parsley soup. Vertical integration means that NTS has the ability to control the quality of the seafood they market from the sea to their clients, be they domestic or international.

The allocation of fisheries assets to Māori may see NTS grow by approximately 40% in terms of asset value. “The change in the allocation model, plus recent quota cuts – and there will be more cuts, I think – substantially lessens the impact of allocation on the growth of NTS” (Gavin Holley 2004).

NTS employs 200–300 staff but this fluctuates depending on key catching periods. For example, in July, August and September a large number of casuals are employed to process hoki landings.

NTS has its own Board of two Directors.

### **Recognising Māori values in business**

NTS is cognisant of that fact that it manages Ngai Tahu’s seafood interests, which means they are in charge of a Māori resource. This fact strongly affects their business practices, with Māori principles of sustainability and sound environmental practices underpinning the operation of Ngai Tahu Seafood. “I would argue we would be more conservative in the way we operate” (Gavin Holley, 2004).

While the key philosophy of NTS is to add maximum long-term sustainable value for the benefit of its shareholder (TRONT) and stakeholders, NTS realises this must be achieved in a responsible manner, which is where the tribal value of kaitiakitanga comes through:

We’re looking after the resource for the long term, so we’re not interested in over fishing for short-term benefits, that’s not what we wish to do. These two philosophies work hand in hand. We translate it into respect. It’s respect for what we need to do for our stakeholders. It’s respect for the fish. It’s respect for the environment. It ends up being a respect for the customers and what they require, so that we can maximise that return at the other end (Gavin Holley 2004).

NTS’s philosophy of respect affects all aspects of business from catching to marketing.

### **Catching and Production**

NTS believes in the traditional practice of sustainable fishing to ensure resources will be there for future generations. With the cooperation of local experienced fishermen, many of whom are Ngai Tahu, voluntary industry codes that are designed to protect and lessen the impact of commercial fishing on the environment are practiced. These measures are designed to ensure that NTS manages the quota appropriately.

Quality is the key principle on which NTS’s operations are built. NTS sets standards and protocols to ensure the product is of the highest quality. These standards and protocols are reviewed regularly so new technology and research that can improve quality are introduced quickly into the production process. These new practices are also passed onto local fishermen through such initiatives as the use of the newsletter “Network”. All these practices are helping to ensure those NTS products delivered to the customer are of the highest quality.

## Marketing

Māori values are reflected in the way that NTS markets itself to the world. The message they want to portray is of a successful seafood company with a product of the highest quality that is sustainable and plentiful.

NTS sees itself as following a western business model but recognises that the interaction the company has with the iwi authority as the shareholder, and with tribal members as the stakeholders is arguably something no other company based on a western business model has. However, it is accepted that the level of interaction that NTS has with the stakeholders, and the high expectation of NTS is a reflection of the close association Ngai Tahu whanui have with the coastal environment and fishing.

The planning process within TRONT group is well considered and is the primary vehicle for validating the direction and activities of NTS. Being a tribal business means it may take longer to get through the planning process, which can impact on NTS. However, NTS accepts that this is part of being owned by the iwi:

Certainly there's much more passion out there for the seafood industry, and that's good. But also the seafood industry, arguably, is going through some significant changes economically, and the danger now is that there's some disparity between the way the business probably has to operate and the way it has in the past. Can we bridge the gap between the two when that gap is getting wider and wider? (Gavin Holley 2004).

Although extra time and effort is needed to ensure NTS takes adequate account of tribal values and practices, the effort NTS puts into its relationship with its shareholder and stakeholders is reflected in the support of the business and its initiatives for the growth of the company, such as the acquisition in 2003 of Cook Strait Seafoods and the joint venture with Pacific Trawling. "I think overall it's very much a positive and in our favour" (Gavin Holley, 2004).

## Strategic direction and sustainable development

The strategic planning horizon of NTS is 5 years, although the marketing strategy, which is more specific, has a 3-year timeframe. The planning of NTS is undertaken within the annual and strategic planning processes prescribed by Ngai Tahu Holding Group (NTHC) and TRONT. All companies of Ngai Tahu Holding Group underwent a strategic planning exercise in 2003.

TRONT principle strategic document is Vision 2025. The whakatauki in this document reflects the overriding philosophy of tribal development:

Mo tatou a mo ka uri a muri ake nei  
*"For us and our children after us"*

The whakatauki recognises that Ngai Tahu has a responsibility to provide for the future generations of the iwi. This clearly has implications for NTS, whose potential growth relies to some extent on the assumption iwi will remain in the seafood business, which will become long lived. To this end Ngai Tahu Holding Corporation undertook research to determine what makes a business successful in the long term – specifically how a business lives to be a 100 years old or more. Having a stakeholder that wants to be a 100-year business fundamentally changes the way a company operates. For example, this long-term horizon distinguishes NTS from:  
 a family-owned company that could be sold off in a generation or two; or  
 a company listed on the share market where there could be a take-over tomorrow.

At an operational level it means that NTS is focused not just on profits but also on long-term goals. Importantly, being a company owned by Ngai Tahu, NTS sees itself as being a Māori business:

NTS is a Māori business because the only reason it exists is because of ‘The Claim’. The customary rights that pre-existed and were recognised by the Crown gave rise to the commercial right. It [NTS] has arisen very much from the customary right. Secondly, all the assets, all the funding have come from its Ngai Tahu stake holders. We are in fact entrusted with the proper commercial operation of those assets for the Tribe. We report back solely, 100% to our shareholder and Ngai Tahu stakeholders (Gavin Holley, 2004).

The fact that the source of the assets (i.e. the quota) originates from the 1992 Treaty of Waitangi Fisheries Settlement is seen to impact on the direction and growth of the company:

If other species come on board we’ll get an opportunity to be involved in those. It spreads the business across a broad base of species, which can be great, but also it diverts your energies and attention. You have to manage so much more, instead of the bigger companies who are focused and get economies of scale on key species (Gavin Holley).

Being a tribal-owned business means there are differences in the way NTS operates and is expected to operate. These differences influence the strategic direction, planning and growth of the company.

### **Processes and standards**

Standards are a key to NTS development. Quality of their product was repeatedly emphasised as being essential to their success. The development of high-quality products are the key to NTS becoming a major player in the international seafood market.

NTS accepts that long-term success requires a positive relationship with the environment from which its natural resources are sourced. NTS has environmental accreditation, specifically Environmark Bronze level. The company has reviewed several different accreditation systems, such as ISO, but full accreditation to achieve certification was considered expensive and time consuming and we were unsure of the benefits at the time. NTS is interested in using a pragmatic environmental management system.

With respect to an indigenous brand or form of accreditation, the company felt that, “although there is definitely room for indigenous branding”, it probably needed to be assessed on a case-by-case basis. They believed there would be issues about how and where it is applied, as it is quite a complex area. As NTS pointed out, companies are still trying to come to grips with “the very sophisticated branding that goes on in the global economy”. NTS described itself as “a young small business that is still learning”.

The different levels of branding need to be considered from an NTS perspective. For NTS, as a tribal business, there is also the issue of corporate branding, i.e. the tribal brand NTS recognises as significant to Ngai Tahu whanui because it “tells people we are Ngai Tahu”. There is product branding for the seafood products themselves and then there are labels in use, which means it is necessary to understand the difference between a brand and a label.

NTS recognises the need to understand what the markets accept or value. In other words, how can NTS maximize the value of each of its products in each of its markets? To complicate matters further, NTS works with some products that are not readily capable of being branded, for example a live eel in a tank in Asia.

While recognising that opportunities do exist, NTS believes a case by-case assessment is necessary.

### **Barriers and advantages**

Although being a Māori business owned by an iwi authority distinguishes the company from others, Gavin Holley does not believe “That it’s held us back from adding the value. I think it means that it



may take more time to act and maybe long term it has some degree of impact on operations”.

NTS contracts many Ngai Tahu fishermen and this requires careful management.

Branding itself was seen by NTS as a potential issue. NTS has previously sought to change the logo of Ngai Tahu Fisheries Ltd because customers do not view fishhooks positively. Many international fishing companies have turned away from the use of a fishhook as a logo, but this remains an issue for the tribe as it is also a cultural symbol. Gavin Holley adds, “If you were to ask me if we should put a fishhook on a retail packet of seafood, I’d say no”. Most consumers worldwide would not want to see a fishhook on their packaging.

Throughout their marketing strategy NTS promotes not only a quality product but also a Māori product, such as soups and sauces under the name Nature’s Bounty, also carry the House of Tahu brand. Both of these brands show the commitment to promote Māori in the international market, which has many benefits for Ngai Tahu and for other Māori businesses.

It is not clear to NTS whether being an indigenous company provides marketing advantages. While the Company would like to “think it does provide us with an advantage in global markets”, it has been unable to realise that to date. Some examples were provided to highlight the challenges NTS is confronting within the fishing industry.

- **Abalone:** The New Zealand’s paua is considered to be at the lower end for quality. The highest quality product is Mexican, then Californian, then Australian, then South African. New Zealand has to bleach the product to get the colour right, because the customers prefer golden or red abalone, which is the colour of Mexican and Californian abalone. The product is canned to extend shelf life and because in Asia refrigeration is not widely available. A canned product can be transported throughout Asia and can be safely left on a shelf for 2 years without deterioration. In Asia there are many house brands and NTS needs to carefully research any branding strategy used in Asia, especially in a market the size of China. NTS says that Hong Kong traders in abalone are likely to have little knowledge of NTS but will know the pack house handling NTS product and whether it has a good reputation and produces quality products. The “brand” every consumer checks is that of the pack house.
- **Lobster:** Lobster was presented as an example of a product that could not readily be physically branded. The attachment of tags has been investigated, but lobsters are exported in bins and are put in new tanks when sent to the market. Ultimately they end up live in yet another tank. The wholesaler or distributor wanting the product is not necessarily interested in the original owner. Branding is not a consideration. Quality and price are of first importance.
- **Markets**
- NTS has looked at branding opportunities in the USA but “*to date there is no evidence of interest in indigenous branding*”.
- NTS has looked at the opportunities in Europe. There has been *some* positive reaction to eco-indigenous branding but only if there is no price differential. At present, eco-indigenous branding is hard to promote, and NTS still believe that for many products, price and quality are the main differentiators – not just brands.
- NTS experience has shown that there is much competition between Australian and New Zealand product.
- In the domestic market, there is may be an opportunity for indigenous branding. However, anecdotal evidence indicates that “the preference of the consumers and buyers is often not to have indigenous labelling or iwi affiliations on the front of the product and more important to show it as a high-quality product, for example the House of Tahu symbol is placed on the back of the soup packs and is not the leading label on the product.

### **Intellectual property issues**

NTS sees trademarks, brands and labels as important to their business and their future development. Further, when NTS puts time and effort into developing them, it sees the need to protect them, which it has done. If NTS develops a new label or a new brand, it protects it in the right classes in the markets in which it ultimately intends to operate. However, it is always cognisant of the costs of renewing trademarks.

NTS are interested in patents to protect an innovative idea or product, or knowledge, and there is a possibility of using patents for commercial use in future. “NTS has the ability to patent and protect a commercial product”.

As Gavin Holley points out, everything the company does, “especially if research is involved, has a level of intellectual property about it. We wouldn’t typically patent unless it is worth something to this business”.

### **Conclusions**

The final observation on the performance and role of NTS is left to their General Manager, Gavin Holley. He believes that NTS is:

Trying to make sure that we maintain the value of the product all the way through, that we deliver it to the market in mint condition, that we present it as best as we possibly can, and that we sell it to all the right markets at the right price. All this is very time consuming but very important. Ultimately, that’s what differentiates us from everyone else, because everyone else in New Zealand, the bigger seafood companies, they’ve all got quota, they’ve all got boats, and they’ve all got plant. So what is it that’s going to make us different? Ultimately it’s going to be the market. The way that we act in the market is going to provide the true differentiation. When we do put the product into the markets we want to make sure we sell our products for the price we want. We can do alot to brand our product and add value to it.

### **Acknowledgements**

This work was carried out under Objective 3 of the FRST programme “Māori Business branding: achieving competitive advantage in global markets”, short title “Waka Tohu”. Special thanks to the General Manager of NTS Gavin Holley who consented to an interview.

### **References**

Te Rūnanga o Ngai Tahu Annual Report 2003  
[www.ngaitahu.iwi.nz](http://www.ngaitahu.iwi.nz)

### **Interview complete**

This manuscript represents a full and honest summary of all my interview comments made on (date):.....and I have been given the opportunity to limit, change or highlight any personal statements before release or publication of these research findings.

Respondent

Signed.....Date.....

Interviewer.....Date.....

## Case study 5 based on an interview

**Organisation/business: Shotover Jet Ltd**

**Interviewee(s): Adrian Januskiewicz (CEO of Shotover Jet Ltd) and Rakihia Tau (Commercial Development Manager, Shotover Jet Ltd.)**

**Interviewer: Gail Tipa**

### Background

Shotover Jet Ltd (SJL) is owned by Ngai Tahu Tourism. Initially Ngai Tahu had an 80% shareholding. As a result of a takeover bid by Ngai Tahu, the remaining shares were acquired and the company was de-listed from the New Zealand Stock Exchange.

SJL consists of tourist attractions operating throughout New Zealand and in the Pacific; more specifically:

- Huka Jet, Rainbow Springs, and Kiwi Encounter in the North Island
- Shotover Jet, Hollyford Valley Walks (purchased in 2003), Dart River Safaris, Franz Joseph Glacier Guiding (a 50% shareholding) and Aqua Taxis in the South Island
- Jet Fiji operating in the Pacific.

Central Otago, especially Queenstown, is well known as an international tourist destination, and SJL has been a major contributor to this. SJL takes tourists through the Shotover Canyon in the unique “Big Red” jet boats. Through jet boating, bush walks and the “Funyak”, Dart River Safaris offers tourists the chance to experience the unique landscape where part of *The Lord of the Rings* was filmed. Hollyford Valley Walks offers tourists the opportunity to experience Fiordland National Park, a World Heritage area, which has remained unchanged for thousands of years. Franz Joseph Glacier Guiding affords tourists the opportunity to climb and trek the pristine Franz Josef glacier. SJL’s North Island operation, Huka Jet, ensures tourists see the spectacular Huka Falls and experience an exhilarating jet boat ride. Huka Jet also benefits from its close proximity to the world-renowned Huka Lodge. Fiji is also a tourist hotspot, and Jet Fiji takes advantage of this by offering tourists a SJL experience on the Nadi River.

SJL has recently opened a new business in Rotorua called “Kiwi Encounter”, which shows people the conservation processes required to reintroduce kiwi to the wild. It is run in partnership with DOC but SJL has commercialised the experience. People can see eggs incubating and hatching, and kiwi chicks being reared and much information is provided with the experience.

These tourist operations offer a variety of experiences ranging from extreme thrill-seeking jet boat rides to tranquil and spectacular treks. Each of SJL’s operations has a specific marketing campaign so they can target the individual(s) and groups who would most likely choose to experience that product. Overseas tourists make up a large part of their customer base. SJL, now part of Ngai Tahu, has a Board of 2 directors and employs approximately 350 staff.

### Recognising Māori values in business

If shareholding is the criterion for identifying a Māori business, then SJL “most definitely is a Māori business”. Ngai Tahu was for some time the majority shareholder before acquiring the remaining shares and delisting the Company from the New Zealand share market. “Also it is widely known that SJL is owned by Ngai Tahu”.

Ngai Tahu Tourism, which owns Shotover Jet, was described by Rakihia Tau as an investment company. In that regard it is also seen as purely a Māori business. However, both Adrian and Rakihia drew a distinction between Ngai Tahu Tourism and Shotover Jet and its subsidiaries:

Once you start examining the actual investments themselves, or the products, it is difficult to describe them as Māori products or a Māori business. Further, at this point I think the culture of these businesses is not the Ngai Tahu culture right now.... SJL is a commercial, corporate-driven organisation with sensitivity to environmental, social, and ethnicity issues, but we don't really act any different to any other corporate owned thing (Rakihia Tau 2004).

However Adrian and Rakihia both expected the values on which the Company is based will change. As Adrian explained,

SJL operates by a certain set of values at the moment. That will change over time as Ngai Tahu values are absorbed into the organisation. I don't think that will be better or worse, it will just be different. They're both good sets of values, and I think it will work for the organisation either way.

We've developed values that we operate from in this business. I've never actually mapped them against the Ngai Tahu values but I can't imagine they'd be too different. It's really just about being results focused. A real sense of achievement is one of our key values, so we really want to create an environment where we're achieving and getting great results.... Respecting people and the environment is the second one. Learning and growing all the time as individuals is the third. Getting involved in the business – that's number 4. Being proud of what we do – that's the 5<sup>th</sup>, and having a lot of fun along the way is the 6<sup>th</sup>. They sound quite simplistic and trite but to the people who are working in the organization they are important values. We try and model our behaviour around those. These are our promises we made to each other as a team.

Valuing customers means SJL needs to be cognisant of the safety standards their operations must meet. SJL has many protocols in place for safety and reviews and introduces new technology that will help customer safety. This is seen as a fundamental principle in all SJL operations.

Kaitiakitanga – respecting the sensitive environments in which they operate – is a fundamental duty of all SJL operations. The jet boat operations seek to minimise noise. The guided treks and walks ensure the effect of humans on the New Zealand landscape is minimal. In addition to participation in the Department of Conservation's programme to breed and release kiwis into the wild, SJL pays concession fees to the Department of Conservation. In 2001 SJL contributed more than \$300,000 in concession fees that are used for community projects.

Two of the SJL businesses were going through an environmental certification process at the time of the interview. Several of the businesses had previously been ISO accredited, but the company decided to abandon that form of accreditation because some of the rules and regulations were not practical for SJL businesses. However, the company still follows the ISO processes but does not seek accreditation.

### **Strategic direction and sustainable development**

In terms of its vision, in 10 years time SJL wants to be the New Zealand leader in providing natural heritage attractions. SJL defines "natural heritage attractions" as tourist attractions that leverage off unique pieces of geography, scenery and possibly the culture of New Zealand. For example, SJL takes advantage of the natural scenery of the Shotover Canyons by running jet boats through them. At Rainbow Springs, SJL takes advantage of the natural trout springs by providing a park attraction to complement them.

SJL markets itself locally and internationally. SJL markets throughout New Zealand to attract tourists as they move through the country, before they make their decision to buy. A lot of marketing is undertaken in Queenstown as customers often make purchasing decisions on the day or

the day before they use a product. Some customers come through traditional tourism channels, such as the Inbound Tour Companies. For example, some customers purchase a package tour of New Zealand, making purchasing decisions through their local travel agent when they have decided to visit New Zealand.

SJL international markets include: the United Kingdom and Germany, as the two key European countries; the United States; Japan, China, Korea, Taiwan and Singapore are other important markets. A large amount of marketing is undertaken in Australia, but very little at this stage in South America. Australia is the single biggest market. India is an emerging market where a lot of work is currently being carried out.

SJL's marketing strategy differs depending on the product. Put simply, they believe it is necessary to understand what the customer wants before developing the matching product. Selective and targeted marketing strategies are implemented and SJL identifies the key New Zealand suppliers and then focuses their marketing endeavours on each of them.

SJL recognises that it is one tourism company within the New Zealand Tourism Industry, and must be aware of international, national and local contexts. In the context of worldwide tourism, SJL contends that New Zealand Tourism needs to be selective about how it markets the country as a destination. Individual company products are again at a lower level so they have to be more selective.

SJL is part of Ngai Tahu Tourism, which is perceived by SJL as offering competitive advantages, including its relationship with the Crown. The Ngai Tahu corporate brand is also seen as providing SJL with leverage in terms of relationships. But SJL was quick to identify it was the Ngai Tahu corporate brand that was potentially important to them rather than a more generic Māori brand:

If you talk to most of the people in the South Island they are generally comfortable dealing with Ngai Tahu, be it on property tourism or seafood-related issues.

Because of the way people work in that business, the way they have been behaving for years has created a sense of integrity and respect and straight dealing. That sort of stuff ends up building the Ngai Tahu brand, as a commercial business... When you talk about branding, a lot of the time branding is just about people. The Ngai Tahu commercial brand in the South Island has started to get some real traction because they have a lot of people working in the business, who are building integrity and trust. But it is the Ngai Tahu brand we're talking about as opposed to being branded Māori.

We know Ngai Tahu has a long-term need to develop relationships in the South Island, so we can't end up screwing people today and expect to have a good long-term relationship with them tomorrow. We're generally working with people we trust, and we know we can have a long-term relationship. If that means building a relationship with their fathers and their sons and daughters then that's what we're doing (Adrian Januskiewicz 2004).

One of the key drivers for SJL was the decision to structure each business as autonomous profit centres. This means each Manager runs a business that gives them the freedom to be entrepreneurial and act as owner/operators. Despite this philosophy of decentralisation, SJL is seen as:

Being quite a tight organization because we do have standards which we expect people to meet...

We take our responsibilities really seriously. We work hard to have the right people environment in which to create a business that is going to be long term sustainable. We spend

a lot of money and a lot of time on that, and a lot of energy. It's not about extracting short-term profits. I think the other comment is from an environmental perspective, it just makes business sense that if we weren't very conscious of environmental factors, that we wouldn't have the business in the long term. I think that long-term view gives it the right sort of balance (Adrian Januszkiewicz 2004).

### **Indigenous Branding**

Rakihia Tau explained there were two types of "Māori branding" that could be used to SJL's advantage in the future:

- Using a Māori brand as a secondary brand – Opportunities to add "an X Factor to a product" have been identified by SJL. "What you can do is talk about the history and myths associated with a product. I think the SJL will probably head down that route and add in a Māori Brand... You can dive into the actual tribal history.... That gives a product the X Factor and is one type of branding strategy. But the important thing that we're saying there is that it is product led – it is not a top-down approach. But it is a secondary brand. The natural attraction is the primary brand and the secondary brand value (the X factor) is the human history."
- Using a Māori brand as the primary brand – This type of branding is to have a product that is purely Māori. Arguably Tamaki Tours represents this type of product. SJL believes that it could go down that route as well with one of its products. But as was pointed out, "I don't think we are there yet."

SJL did not see any real advantages to be gained from the concept of indigenous branding. They explained they de-emphasise the fact they are a group of tourism companies and instead focus very strongly on product branding, for example:

SJL is a 'Rock 'n' Roll' sort of brand and we focus really strongly on promoting that product as a brand.... The Ngai Tahu business is very strong eco-tourism – environmental with a hint of the ethnicity. Although it is a nice brand we focus really hard on, to a traveller from the UK it means nothing. As much as we'd like it to – it doesn't. We find that they relate much more to the product that they might be doing (Rakihia Tau 2004).

For Māori branding or Māori accreditation both Rakihia and Adrian believed caution has to be exercised:

I can't see any logical reason at this stage for it in terms of what we will do in the future. We will try and develop our own brands and make a success of those. Once they are a success we might consider a Māori accreditation and/or a Māori brand. But at this stage I can't actually see any competitive advantage to our business, with such a brand, especially if we're trying to create a Ngai Tahu corporate brand as well (Rakihia Tau 2004).

Rakihia and Adrian both emphasised the difference between logos and brands:

I think one issue about branding, is that it's not about the logo – which I think people tend to focus on – it's about understanding the customers and the market, and how that logo will add value to what you do. The strategy will drive the logo, not the logo drive the strategy, which I notice happens a lot... You can't adopt or inherit a brand. You have to build a brand.

If there was this Aotearoa Brand that was the Māori brand for New Zealand, you can't say, "Oh, good, I'm going to start a tourism product and adopt that brand because it's going to add value to my business". It's actually the other way around. If I start a business that has a brand, it will become a good brand if I feed it and develop it through providing a quality service, getting good customer feed back, and providing the right sort of marketing distribution. But

the Māori brand is nothing on its own. When you are talking about a Māori Brand, it will end up being a fabulous thing if everyone feeding the brand is doing a high quality job. But the reality is, with an indigenous brand right across the country, how are you going to get all the people to do a quality job? It's something you have to be very cautious about it (Adrian Januszkiewicz).

### **Processes and standards**

Implementing safety standards that meet or exceed industry standards are vital to SJL. A health and safety programme (based on the Dupont model) was introduced in 2003. Each business unit has its own strategies for improving its health and safety performance.

The Company also signalled in its 2003 Annual Report that the introduction of the Reliability Centred Maintenance methodology into jet boating has been successful and is having a positive impact on safety.

In addition to these company initiatives, SJL also needs to comply with all legislative requirements, be they health and safety or environmental.

### **Barriers and advantages**

The benefits of owning SJL to Ngai Tahu have been:

- financial, with the SJL asset base increasing through the purchase of additional tourist attractions;
- the sense of pride derived from owning a tourist icon that is recognised nationally and internationally as providing a quality product.

Delisting from the Stock Exchange represents a significant change for SJL. It is Ngai Tahu Tourism's "flagship", along with Ngai Tahu Tourism's minority shareholding in Whale Watch. While SJL staff identified the benefits associated with being owned by Ngai Tahu they also confirm that changes are expected. The challenge for Ngai Tahu Tourism and SJL is to be integrated fully into the Ngai Tahu Holding Group and Te Rūnanga o Ngai Tahu group structure without losing the characteristics that have seen the company develop icon status within the New Zealand tourism industry.

### **Intellectual Property**

With respect to intellectual property, SJL sees their brands as valuable intellectual capital. The company applies a rigorous process of protection around patent, copyright and brands:

It's not R & D in a scientific research development sort of sense, because we're not that sort of business. Our R & D is much more around understanding how our customers receive our product...accepting feedback and modifying our product, behaviour or whatever.... Looking for new business opportunities becomes quite a creative process but it's not really R & D. We have protection in place, and we renew it when it comes time to renew it, and we watch our competitors closely to make sure they're not trading off our brands (Adrian Januszkiewicz 2004).

### **Conclusions**

Shotover Jet Ltd remains one of New Zealand's most recognised tourism operators. Although New Zealand has been affected adversely by work events such as SARS, 11 September, the war on terrorism and weak economies in some trading partners, SJL has implemented strategies that have ensured the continued growth of its business.

### **Acknowledgements**

This work was carried out under Objective 3 of the FRST programme “Māori Business branding: achieving competitive advantage in global markets”, short title “Waka Tohu”. Special thanks to the Adrian Januszkiewicz CEO of Shotover Jet Ltd and Rakihia Tau Commercial Development Manager of Shotover Jet Ltd.

### **References**

Shotover Jet Ltd 2003 Annual Report

Te Rūnanga o Ngai Tahu Annual Report 2003.

[www.ngaitahu.iwi.nz](http://www.ngaitahu.iwi.nz)

### **Interview complete**

This manuscript represents a full and honest summary of all my interview comments made on (date):.....and I have been given the opportunity to limit, change or highlight any personal statements before release or publication of these research findings.

Respondent

Signed.....Date.....

Interviewer.....Date.....

### **Case study 6 based on an interview**

**Organisation/business: Team Logistics Ltd**

**Interviewee(s): Greg Whitau (owner of Team Logistics New Zealand)**

**Interviewer: Gail Tipa**

### **Introduction**

Māori businesses are increasing their profile within the New Zealand business sector, and many are active in global markets. One characteristic common to all Māori businesses (and indeed non-Māori businesses as well) that either import or export products is their use of a freight forwarding company. Put simply, a freight forwarding company can “pick a product from a shelf anywhere in the world and put it on another shelf somewhere else in the world” (Greg Whitau pers. comm.). A freight forwarding company manages the scheduling of the movement of products around the world and all biosecurity and compliance issues when entering and exiting a country.

Although many companies use the services of freight forwarder, some interesting points need to be noted:

- Freight forwarding is a highly competitive environment as evidenced by 45 companies operating in Christchurch City alone.
- If all Māori businesses supported a Māori freight forwarding company it would be the largest freight forwarding company in New Zealand.
- Other indigenous companies around the world, if operating in the import-export market will also be using freight forwarding companies.

However, two obvious questions arise:

- How many Māori freight-forwarding companies operate in New Zealand?
- How many existing Māori businesses make use of the services of a Māori freight forwarder?



In response to the first question, this case study profiles the one known Māori freight forwarding company in New Zealand, Team Logistics New Zealand, which although being based at Christchurch Airport, moves products through most ports.

Team Logistics New Zealand is a privately owned company that employs 22 staff. One staff member is based in Geraldine and manages sales in the North Otago and South Canterbury areas through the port at Timaru. The rest of the staff is based at the Christchurch Headquarters.

Turnover in 2001 was \$9.2 million (Te Puni Kōkiri 2002).

### **Company Background**

The only Māori owned freight forwarder operating in New Zealand, Team Logistics New Zealand operates both domestically and internationally, managing the export and import of air-freight and sea-freight, customs brokerage and warehousing and distribution (New Zealand Iris Consumer Directory 2004).

Greg Whitau and Russell Lambert who both have experience in the freight forwarding industry established the company in 1997.

The completion of their new purpose-built facility at Christchurch Airport in 2002 was a significant step for Team Logistics New Zealand. Comprising 10 000 square feet of warehouse space and 5000 square feet of office space Team Logistics New Zealand now has the ability to hold consignments without the fear of weather damage. This gives the Company the ability to compete with large multi-national freight companies (Airport City – Christchurch International Airport 2004).

Christchurch Airport is the headquarters of Team Logistics New Zealand. It is one of a number of companies leasing land at the airport. Some are independent companies (such as Cameron's) while others are the larger multi-nationals, e.g., DHL. To compete, Team Logistics New Zealand relies on their experienced staff, relationships with airline/shipping companies, and their commitment to meeting client needs. After 8 years Team Logistics is a competitive force in the freight industry (Team Logistics web site 2003). "You get the right networks and they enable you to develop the business" (Greg Whitau).

### **Recognising Māori Values in business**

Team Logistics New Zealand is owned by Greg Whitau, who identifies as Māori and sees his company as being a Māori business. He proudly says Team Logistics New Zealand is the only Māori freight forwarding company operating in New Zealand and the world.

The web page of Team Logistics New Zealand explains that the company is driven by three core philosophies

- People: having the best people in the team to be the best; and Team Logistics New Zealand chooses its people carefully
- Performance: Like any team, Team Logistics New Zealand is only as good as its last performance, so it drive itself to perform superbly
- Profit: The business is there to make money. Team Logistics New Zealand knows that its customers' successes will mean its success

While many companies, Māori and non-Māori, espouse principles similar to these, it is the way in which they are implemented that truly reflect a Māori kaupapa. For example, Team Logistics New Zealand emphasises the need to build and sustain trusting long-term relationships with its customers. It prides itself on the positive feedback it receives from customers. "If I am leading the company it is how I am as a person that is reflected in the business" (Greg Whitau).

Being privately owned by an individual, the company has to focus on the bottom line. Unlike other businesses, including iwi-owned companies that have multiple income streams, Team Logistics New Zealand earns money when it moves freight. To remain in business it has to be successful in attracting customers and meeting their needs competently and at a competitive cost.

If there is no difference in price, it comes down to service. That is where we make a difference and need to make a difference. I think we do. When we bring new customers on board they are amazed at the level of service.... You have to be competitive. You can't be dearer than anybody else. We can't be in the middle of the market or at the bottom of the market. We need to do it on service (Greg Whitau 2004).

### **Strategic direction and sustainable development**

Team Logistics New Zealand was established in 1997 with a 10-year strategic plan that understandably was focused on establishing and building the business. Team Logistics New Zealand is profit driven, like any business. "The bottom line is, if we are not making money, why stay in business?" (Greg Whitau). The Company therefore developed and implemented strategies to gain market share and generate profits. Their initial strategy set a number of long-term targets.

Government programmes aimed at helping Māori businesses played a role during the Company's establishment phase. With the early help of both Ngai Tahu Development Corporation and Carich Computer Training Services under the Government's BIZ training programme, Team Logistics New Zealand was able to develop a tailor-made database system that is a powerful tool in gaining and managing customers.

The assistance of Price Waterhouse Coopers also enabled Team Logistics New Zealand to identify areas in need of development and implement a number of strategies and processes to address these.

To re-emphasise earlier comments, Team Logistics New Zealand prides itself on customer's relationships. In the freight forwarding sector a client base is vital to success as the quantity of freight moved determines the profits. Team Logistics New Zealand has especially high standards when it comes to their interaction with their clients. Greg Whitau believes that their commitment to their customers gives them a strategic advantage over competitors and is the key to their continued growth:

Reputation will generally open the door for you. Once you get the door open you have to walk the talk and that is what we do.... In terms of operating in the international market, it's about developing strong relationships with overseas companies and developing strong relationships with the right agents overseas, e.g., Maersk Logistics is the largest shipping company in world ... For Maersk Logistics we are their freight forwarding agent here in Christchurch.

The Company is 7 years into its 10-year strategy, and to date has achieved what it set out to achieve. It is now in the process of setting its direction for the next 3 to 5 years. Now that Team Logistics New Zealand is an established company, Greg has identified a number of innovative strategies – still to be fully explored – that would not only grow Team Logistics New Zealand, but benefit iwi and Māori businesses. For example, future strategies being considered include the following.

- Increasing the number of Māori businesses that utilise the services of Team Logistics New Zealand. If the costs of using a Māori freight forwarding company are comparable to, and the quality of the service as good as if not better than other freight forwarding companies, why would Māori businesses not support the Māori owned company? "Māori businesses need to use service industries. They have to. They all use freight forwarders, so if you had to use a freight forwarder, why wouldn't you maybe get something going... It could be on a tribal or whānau basis or a joint venture. If you are using something you have to anyway,

you could put a structure in place in terms of education and employment and all those sort of things” (Greg Whitau 2004).

- Enhancing “logistics capacity” within Māoridom through joint ventures and scholarships. While Team Logistics New Zealand is the only Māori freight forwarding company, there are limited numbers of Māori working in the sector as a whole. What clearly emerges when talking to Greg is the importance of the “people skills” that give Team Logistics New Zealand its competitive advantage. It is the 20 plus years experience in the sector, and the network of personal contacts that has contributed to the portfolio of agents and clients around the world. This has collectively given Team Logistics New Zealand, as the only Māori freight forwarding company, a head start in the sector. It is also likely to prevent another Māori freight forwarding company setting up as a stand-alone entity in the immediate future. However, Team Logistics New Zealand can play a key role in helping develop logistics capacity within Māoridom. “You can be bringing young people up and providing work experience, jobs and degrees in logistics...One of my thoughts is that we would like to provide the sort of infrastructure to support education, employment and the whānau, basically” (Greg Whitau 2004).
- Investigating links with other indigenous communities around the world. Greg advised that if a single company were the freight forwarder for all Māori businesses in New Zealand it would be the largest in New Zealand. The scale of what this would mean in a global environment, given that more and more indigenous communities are active in business, is hard to estimate.

### **Processes and standards**

The role of the freight forwarder is such that, when agreeing to move freight, they assume compliance responsibilities for cross-boundary issues, biosecurity, hazard management, food safety, etc., plus the increased security demands in the post-September 11 global environment.

As Team Logistics New Zealand holds a MAF licence it is permitted to handle certain types of produce. The compliance costs associated with meeting MAF standards costs approximately \$1000 per month; however, as Greg Whitau explains, holding a MAF licence is another way of achieving a strategic advantage, “There are only three of us at the airport that have the licence. It cost \$1000 month to retain it”.

There are also extra security demands, after September 11, for all products destined for the USA. Instead of loading containers right up until they were due for shipment, containers need to be packed, with an inventory available and screened by security before being shipped. Increased security demands also mean increased compliance costs that are met by the freight forwarding company.

### **Barriers/advantages**

Greg does not see any disadvantages to being a Māori business. Rather he sees it as a positive, and in developing the future direction of the Company is looking at opportunities that will enable Team Logistics New Zealand to grow while at the same time benefiting other Māori businesses by:

- Providing cost-effective and quality freight forwarding services;
- Enhancing the capacity of Māori; and
- Investigating joint ventures with Māori throughout New Zealand (Business Development News 2000). “There are big opportunities. It’s bigger than just what it would be for my business” (Greg Whitau).
- Providing possible education and employment opportunities in logistics for Māori.

The principal barrier to Māori entering the freight forwarding industry appears to be capacity. Team Logistics New Zealand repeatedly emphasises the importance of networks and relationships, which only time spent in the industry can build.

### Conclusion

Team Logistics New Zealand represents an interesting case study because a freight forwarder is not the sort of company that immediately comes to mind when identifying Māori businesses working in the global market. Yet, as Greg Whitau explains all businesses use a freight-forwarder.

Because we do not immediately identify freight forwarding when considering Māori business opportunities, we also fail to realise the scale of the freight forwarding sector and the opportunities available to Māori. However, Team Logistics New Zealand, “could be the freight forwarder for all Māori businesses throughout New Zealand. If we were, we would be the biggest company in New Zealand. That is the amount of business involved” (Greg Whitau).

Greg Whitau has identified opportunities for growth over the coming years, and it will be interesting to see if and how Māori capacity in the freight-forwarding sector develops.

### Acknowledgements

This work was carried out under Objective 3 of the FRST programme *Māori Business branding: achieving competitive advantage in global markets*, short title *Waka Tohu*. Special thanks to the owner of Team Logistics New Zealand, Greg Whitau, for consenting to be interviewed.

### References

Airport City – Christchurch International Airport limited commercial property website. 2004: Retrieved from <http://www.airportcity.co.nz/development>

Business Development News – Number 76. 2000: Retrieved from [http://www.med.govt.nz/irdev/ind\\_dev/news/issue76.pdf](http://www.med.govt.nz/irdev/ind_dev/news/issue76.pdf)

Greg Whitau pers comm. Owner of Team Logistics New Zealand.  
New Zealand Iris Consumer directory. 2004: Retrieved from <http://iris.co.nz/company-profile/191615054>

Team Logistics website 2003: Retrieved from <http://www.teamlogistics.co.nz>

*Te Puni Kōkiri 2002: Māori in the New Zealand Economy June*

### Interview complete

This manuscript represents a full and honest summary of all my interview comments made on (date):..... and I have been given the opportunity to limit, change or highlight any personal statements before release or publication of these research findings.

Respondent

Signed.....Date.....

Interviewer.....Date.....

## Case study 7 based on an interview

**Organisation/business: Whale Watch® Kaikoura Limited**

**Interviewee(s): Marcus Solomon (General Manager, Operations, Whale Watch Kaikoura), Wally Stone, Chief Executive Officer (CEO) (excerpts from previous interviews – references at the end)**

**Interviewer: Garth Harmsworth**

### Background

#### *Description of business:*

Whale Watch® Kaikoura Limited is a community trust (Kaikoura Charitable Trust), owned by the Māori people of Kaikoura in partnership with their affiliated tribes represented by the organisation Te Rūnanga O Ngai Tahu (Ngai Tahu Holdings Ltd) based in Christchurch <http://www.ngaitahu.iwi.nz/Main/Home>. As such, its activities are governed by the Companies Act 1993. WWK owns 4 registered subsidiaries, all of which are private companies in their own right and follow the model of the parent company. The company structure, adopted in 1988, is a standard business structure that enables WWK to carry out its activities.

WWK is recognised as one of New Zealand's most distinctive and successful tourism ventures. WWK provides tourists with close up experiences of sperm whales and other marine mammals gathering and feeding off the Kaikoura coast, South Island (Te Waipounamu), New Zealand. The business now embraces whales (i.e. sperm, humpback – migratory in June/July, orca – summer), at least 2 dolphin species (e.g., Hector's, dusky), fur seals, and other marine species, a wide variety of offshore birds (e.g., royal albatross, shearwaters, petrels, gulls, penguins, and gannets), and also promotes marine and coastal environmental and cultural education. WWK is a powerful mix of indigenous people, culture, heritage, and the environment, which together create the formula for business success (Wally Stone).

#### *History*

In the late 1980s and early 1990s New Zealand underwent a rapid transformation and restructuring of its economy, a process exemplified by decentralised government control and decreased state dependence, widespread sale of state assets, and increased privatisation, which ended in a deregulated free market economy. Through a raft of legislation and policy, Government reforms had great impact: government restructuring and down-sizing of government departments and the sale of government-owned businesses and assets (e.g., railways, roads, land). During these reforms fisheries regulations and the fish quota management system effectively ended many small commercial fishing operators from working, many were Māori family fishing businesses. Other major impacts were on farming due to the phasing out of farm subsidies. These changes had far reaching consequences for New Zealand society and for townships such as Kaikoura (pop. 2060 in 1987) in the South Island. Kaikoura was badly affected by the rapid social and economic upheaval that resulted in rising unemployment (up to 90% unemployment in 1987), high Māori unemployment and low educational achievement, social disruption, families struggling financially, increasing drug abuse, and rising crime. Many new ideas were discussed at a series of community meetings aiming to create new employment and business opportunities, and stimulate economic growth for the Kaikoura area. Tourism was highlighted as a key area. Within tourism, local indigenous Māori suggested marine mammal watching, which embraced their links to the whale ancestor Paikea. In the late 1980s there was little idea that this would be a successful business venture.

Whale Watch Kaikoura (WWK) was formed in 1987 by Bill Solomon who recognised the unique nature and natural assets of Kaikoura as fundamental attributes for establishing a new business. After being rejected by several mainstream banks, Bill Solomon and 4 other local families – all affiliated to Ngāti Kuri and Takahanga marae – mortgaged their homes to raise enough capital to

secure a loan to start a whale watching venture, and purchased their first boat to carry visitors. WWK began operations in 1989. In the first two years most staff received no payment for their work.

During its infancy the company was able to secure the help and expertise of key people such as Des Snelling, a Christchurch corporate banker; Gary Moore, the current director; and Wally Stone, the current chairman of directors, all of whom helped develop the core business disciplines to give the company a secure future. Des Snelling comments, “They had enormous difficulties through their lack of business skills and their lack of confidence in themselves... as an ordinary commercial venture it had nothing... To go to sea with one boat, a few brochures, and a lot of hope... When we started we had a case of ‘big vision, small money’ (Wally Stone).

During the initial years there were two competitive whale watching companies based in Kaikoura. When one of these companies was put up for sale, WWK made a serious decision to keep the business of whale watching under local ownership, and approached the local tribal authority – the Ngai Tahu Trust Board – to secure a commercial loan. The Board bought a major shareholding in the expanding company with assistance from the old Ministry of Māori Affairs (now Te Puni Kōkiri); a \$NZ100 000 Māori venture capital agency loan, and a NZ\$5 000 business development grant through the Marlborough Development Board. The whale watch operation proved successful, and there are now a total of 4 vessels for watching marine mammals.

WWK has since won numerous awards: in 1994, the British Airways Tourism for Tomorrow Award for the world’s best eco-tourism venture; in 1997, the international Green Globe achievement award for outstanding progress in environmental programmes, and distinction in tourism; and in 2005, the Pacific Asia Travel Association (PATA) gold award, presented in Beijing, recognising excellence and accomplishment in the culture and heritage category. In 2005 Whale Watch Kaikoura was also winner of the New Zealand Tourism Operator of the decade.

*Name of industry sector*

Tourism and Eco-tourism. Environmentally and economically sustainable, and run by indigenous people with a heritage and a view of the future based on strong Māori values and principles. It is a brand which fits the image that New Zealand is trying to convey to the world.

Whale watching (credited to a Californian who began such an operation in 1955) is rapidly growing internationally, with an annual income of US\$300 million, 50 companies worldwide, some 4 million customers, but there is only one such venture in New Zealand. The business success in New Zealand can be attributed partly to the unique coastal and marine characteristics, to the availability of food and nutrients from the seafloor along the steep continental slope and deep offshore tectonic trench, and to the remarkable marine biodiversity off the Kaikoura coast. WWK encourage visitors to come in the peak season (summer), but whales can come in as close as 1–3 km off-shore throughout the year.

Almost overnight this town has become internationally acknowledged as the world’s best site for viewing sperm whales and dolphins (Wally Stone).

*Size of business? Number of staff?*

The WWK board has 5 directors. At a corporate level, governance comprises 2 directors (holding 43.5% of shares) from Te Rūnanga o Ngai Tahu, and 3 directors (holding 56.5%) representing WWK – 5 main Māori families. The CEO is Wally Stone, founding director, who took over as CEO in 1993. The company employs about 50 people, 30 of them core staff members. In the peak season WWK directly employs 70 people and supports many extended families (see <http://www.whalewatch.co.nz>)

*Turnover? Revenue? Assets?*

The company has grown from a small business to a medium-sized one. Company turnover is approx. \$3 million/yr, with assets now around \$2.5m, while shareholder funds stand at about \$2 million. WWK is now entirely funded by its own cash flow, is growing steadily, and is now the largest employer in the Kaikoura. It has been responsible for huge increase in tourist visitor numbers to Kaikoura:

1987: 3 400

1995: 88 000

2004: 200 000

In 1995 the company shared the Whale Watch experience with 40 000 people, 90% of whom were from outside New Zealand. Expectations are for 50 000 visitors to WWK in 2005. In the Kaikoura community WWK has stimulated growth in accommodation, restaurants, the retail sector, services, and other sea-based ventures. Predictions are for further large growth. WWK has 5 catamarans: *Aoraki*, *Te Ao Marama*, *Wheketera*, *Makawhiu*, and the newly purchased *Paikea*. Each catamaran takes up to 48 passengers, and makes 4 trips a day. WWK also runs a fleet of buses. There is a high peak season (Nov–April), and an off-peak season (May–October).

*Do you market products/services nationally? internationally?**If internationally what countries?*

WWK has invested heavily in marketing and branding, especially overseas. Marketing was a large budget factor, and travel agents commissions are between 20 and 24%. WWK became part of “Discovery New Zealand”, a programme marketed to campervan operators. Of those who share the experience with WWK, 90% are from outside New Zealand. New Zealand Tourism Board has supported WWK by making sure visiting tourism journalists and travel professionals see the operation (Wally Stone).

*Do you have a vision for your company in terms of where it should be in 10 years?*

The original WWK vision was inspired by Paikea, our ancestor. We see our business now as reinforcing the anti-industrial whaling message, believing the whale watch experience is a powerful message against any return to wholesale whale slaughter (Wally Stone). This in turn reinforces preservation, whale protection, moves towards a Southern Oceans whale sanctuary, and a continuation of our history and culture.

One of the most significant moments in the development of the company came when we (management) realised there were whales at Kaikoura all year round (Wally Stone).

WWK is not standing still. To stay at the forefront of sustainable, indigenous, and ecological tourism, WWK will be looking to add further quality and service to its tourist packages. We were seen as trailblazers, and we want to stay there (Wally Stone).

We (Ngai Tahu) have lived with the whale of the Kaikoura for a thousand years, and we want to live with them for another millennium.

For many years WWK has been planning a land-based facility to be built on the peninsula. Based on Kaikoura's unique marine & cultural heritage, the complex will include a land-based experience, and a hotel and restaurant, to provide our visitors with an alternative experience when seas are rough (Marcus Solomon).

The New Zealand Tourism Strategy 2010 (NZTS 2010) was developed on a vision for the tourism sector to 2010:

*In 2010, visitors and their host communities understand and embrace the spirit of manaakitanga (hospitality) while, New Zealanders' environment and culture is conserved*

*and sustained in the spirit of kaitiakitanga (guardianship), and tourism is a vibrant and significant contributor to the economic development of New Zealand.*

For Whale Watch Kaikoura this Tourism 2010 vision is also our vision for the future (Wally Stone). The 2010 strategy steers us through the many challenges without losing sight of its vision. The 2010 Tourism Strategy is founded on a very simple vision that if realised would make New Zealand a better place for both visitors and locals. It addresses the fine balance of competing interests, priorities and time-frames. What is important in this vision is to manaaki (host, value) our visitors, while exercising kaitiakitanga (guardianship, responsibility) for our environment and for Aotearoa (Wally Stone).

A special challenge for the future of WWK will be to create for visitors, an experience of our Māori world view (Te Ao Māori). We know who we are – the challenge is to take people on that journey with us. It is the journey of creation as we understand it, a process that engages all senses so that visitors, through their own means, are immersed in our world and how we interpret it – an experience to touch the heart and mind, through Te Kore (the nothingness), Te Po (the night), Te Ao Marama (the world of light) to Ranginiui and Papatūānuku, through Tangaroa, Tane Mahuta, Tawhirimātea, Tūmataunga, the preparation of the world of man, and then with our ancestor Paikea on the back of the whale Tohora (from Hawaii), and finally to our people Ngati Kuri, Takahanga marae, and to the present day – a journey of two beings as one consciousness (Marcus Solomon). We are of Takahanga, we are of Ngati Kuri, we are of Paikea, we are of WWK; our children are descended from Tahu Potiki, Kai Tahu, Ngati Kahungunu and Ngati Porou. A journey to a place where our people can stand proud, at our marae and in WWK, we are kaitiaki – of Paikea – and we can facilitate that experience for our visitors (manuhiri) and create the journey for people into/through our world. It is our custodial responsibility to express our views and identity, borne out of mana, our koha to our manuhiri – a natural evolution. Our values need to be intrinsic, an expression of ourselves, a true exchange (Marcus Solomon).

Wally Stone believes for the vision to be successful it must be “a living culture of the organisation”; it must be owned by everyone, working closely with business partners, in order to leverage off them. For the people to own and buy into a vision it must make sense, because people do things they believe in. “If you line up all the levels, you are more likely to go forward together. Success comes from making others around you successful. Strategic planning must employ quality analysis of market information where the consumer is king” (Wally Stone).

### **Recognising Māori values in business**

*Do you regard your business/organisation as indigenous, is it distinctly Māori?*

The Kaikoura operation is distinctive in that it is Māori owned. We are owned by Māori and proud of it (Wally Stone). A bonus is that WWK view their work as an expression of their Māori as well as New Zealand “Kiwi” culture. They also see a role for themselves as leaders in ethnic tourism in the Asia and Pacific region (Wally Stone).

The success of WWK enables WWK to be more Māori focussed (Wally Stone). Success enables WWK to reflect its values, and this is empowering (Wally Stone).

Authenticity will be the catch-word. Our greatest cultural component is the Ngai Tahu staff – our people (Wally Stone). Eco-tourism and ethnic interpretation seem to go hand in hand in Kaikoura (Wally Stone).

The marae is very special to us (Marcus Solomon). The marae, however, is not part of the experience WWK offers. While other Māori tourism ventures use these community meeting and activity centres in their business, and despite strong pressure to do this from the Kaikoura community, “we don’t want to commercialise the marae”, “it is not for tour groups” (Wally Stone).



*What distinguishes your business from a non-Māori business?*

It is different because our business is not based solely on materialistic outcomes. Spirituality is the glue that pulls us together, which makes Māori special and it is something that mainstream businesses could take on. Relationships between people, family, and marae – that connection is powerful and has a spiritual element recognising the balance between the physical (tinana), spiritual (wairua), mental (hinegaro) and family (whānau) dimensions. These relationships are fundamental for our wellbeing, and are all based on intrinsic values and responsibilities. We have a social as well as a financial responsibility. This is much broader than a normal company – it is shown in the way you treat your staff, create an environment where people can grow and succeed and empower themselves, though principles such as whānaungatanga and manaakitanga; this process is very important. If people/staff move onto better things you know you have done your job, they have grown and are expressing their tino rangatiratanga. This is something to celebrate and it becomes theirs as well as our success (Marcus Solomon).

The company structure of WWK is made up of capital and directors from Te Rūnanga o Kaikoura Trust Board (corporate body of the local tribe, Ngati Kuri) and Te Rūnanga o Ngai Tahu (the corporate body of the major tribal group or iwi, Ngai Tahu, of the South Island).

*What does being Māori or indigenous mean to your organisation? How special is it? What does it mean to you personally?*

Everything. We are not owing to anyone and have control over ourselves, spiritually and economically (tino rangatiratanga). We can make decisions without seeking permission from anyone else (Wally Stone).

This has been achieved by empowering our own people with a vision of the future.

A Māori organisation is successful when it is seen by its peers to add value to the industry. When the entire industry looks at you as a leader, then as Māori we are achieving the ultimate (Wally Stone).

WWK has become one of the modern pioneers in ethnic tourism (Wally Stone).

*Does your business/organisation best follow, or fit, a: distinct Māori business model (e.g., traditional, tikanga)? a modern western business model?, a composite business model (e.g., elements of Māori culture, tikanga and western business)? or some other? Please explain.*

I like to think of western business models as stock standard, nothing special. Our business is more of a rangatira model, you need to understand rangatira culture, derived from whakapapa and rangatiratanga, that's our model, it's leading by example, although adapted from structural principles common to mainstream business. The shape is common to mainstream business, but it is the life you breathe into that shape that is different – you then create a whakapapa for that business, e.g., Paikea to Ngati Kuri to WWK, elements of customer service, finance, marketing, etc. (Marcus Solomon).

The business of whakapapa is interpreting information and statistics based on clear logic underpinned by core values. Financial information is part of the whakapapa of the company. Marketing, imaging and branding are all integral strands to the whakapapa of Whale Watch Kaikoura Ltd. The company has a life force or mauri, it's powerful, dynamic, providing opportunities and something profound such as unlimited commercial value. These attributes are the formulation and reflection of the staff within the company and the whakapapa that binds us (Marcus Solomon).

As a business we have a unique ownership structure and philosophy and we are able to give effect to these values and culture because we are successful – we are empowered to make decisions (Wally Stone). We are currently satisfied with WWK internal structures and processes (Wally

Stone). The company constantly reviews its processes as a standard part of the business culture.

The company structure, with a board of five directors and a CEO, was adopted in 1988. It is a standard business structure that enables WWK to carry out its activities. Because shareholders have the ultimate power to remove or appoint directors at anytime, the company ensures shareholders are aware of the strategic direction so they can constantly assess whether the board and the company has the skills to achieve business goals. Legally, the majority shareholder gets 3 seats on the board and the minor partner receives 2. However, in WWK the board make-up is decided by consensus of both partners, which we believe is a healthier approach. The constitution therefore has guidelines for appointment processes (Wally Stone).

Directors must understand the shareholders' values, possess strategic capability, and have technical expertise. In terms of developing its leadership, the organisation watches what happens in the market place and examines its business partners. You are looking at rewarding people who deliver excellence and results (Wally Stone).

Management is accountable to the board on a monthly basis, and the board of directors is accountable to the shareholders though the AGM. Shareholders are able to measure performance on the year's targets and get a sense of direction and goals for the coming 12 months. Shareholders can also request special meetings and have the right to express their views as they fit. However, shareholders have no rights to interfere with the day-to-day operations and management, and they (shareholders) should be comfortable enough not to interfere with workday operations. The same applies to board members (Wally Stone).

Success means we can do what we want when we want to. The things we want to do reflect who we are – a company owned by Māori, and proud of it (Wally Stone).

*What are some of the key principles or philosophies your business is built on?*

We're applying lessons of the past to the present "using the wisdom of our heritage to preserve it for the future". By using our experience and expertise we will create a better future (Wally Stone).

We have 3 key principles (Wally Stone):

- Everything must be culturally acceptable
- Economically viable, and
- Environmentally sensitive – it cannot deny future generations.

These principles come from our culture, we want to live here for another 950 years. The whales are integral to our culture. We are talking about lineage, about myths and legends and how they all connect (Wally Stone).

Whakapapa, rangatiratanga, whānaungatanga – when you normalise these values through actions people will understand the values you are expressing, these underlie life values, common sense values. Intrinsic values you see on the marae have a natural fit in everyday business and in life in general. I like to think of the marae as the other half of that consciousness that extends into our business - separate in function but intrinsic in terms of those values and outcomes that are important to Māori and the wider community (Marcus Solomon).

Visitors to New Zealand measure their experience by the genuine warmth and welcome they receive while in our beautiful country. New Zealanders, on the other hand, welcome and host visitors because of their contribution to enhancing and maintaining our quality of life (Wally Stone).

This requires a fine balance; when it works it can create an unforgettable experience for the visitor and real benefit for the host community. To get this balance right is to create a sustainable future for both visitor and host community (Wally Stone).

Any potential conflict is resolved by adherence to clear principles and values. When difficult decisions arise we go back to this – without fail these principles and values give clarity and a way forward.

WWK works within a philosophy of sustainable management and sensible use of natural resources (e.g., preserving the natural environment). In this philosophy, human life is an integral part of a larger dimension where all living things have their rightful place – based on Māori values such as whakapapa. WWK takes people to visit the whales in their natural environment – we are visitors to the whales’ world and must respect this at all times. Nothing will be done to jeopardize the ecosystem that maintains the whales and marine species and keeps them close to Kaikoura. The whole operation is backed up by independent internationally recognised research (Department of Conservation NZ).

*Are these traditional iwi Māori principles? Can you name the main ones?*

Our principles and values are derived from our culture and heritage. Some of most important values are:

- Whakapapa (ancestral lineage, links, cultural heritage)
- Manaakitanga (host, value)
- Kaitiakitanga (guardianship, responsibility)
- Whānaungatanga (family, relationships)
- Mana (prestige, authority)
- Rangatiratanga (empowerment, identity, strength)
- Kotahitanga (unify, reach consensus, include people in decision-making)

*How have traditional Māori principles been incorporated into your business? e.g., orally? through business plans?, strategic planning?, statement of intent?, mission statement?, products and services?, human resources?, organisational structure? conflict resolution? interaction with stakeholders? at all staff levels?*

The WWK board and management meet regularly and Wally believes this environment is important. Management are living the day-to-day activities and can use the board to critique or validate the company direction or implementation, “when you have this right, the process becomes very powerful”. Directors must add value; they can sap enthusiasm if they micro-manage. When everyone has a shared vision, meetings become dynamic and add quality to the business.

Our paramount responsibility is to maintain financial viability, which is no different from maintaining the good health of the Hapū or iwi. We have a responsibility to maintain financial viability so we are able to give our staff security – then they can contribute positively to the customer experience. This is whānaugatanga where it counts and surely the ultimate expression of manaakitanga.

Stating Māori principles in my view dilutes their intent. If I have to explain manaakitanga then there is a good chance I am not delivering it. The challenge is to normalise our principles so they become normal day-to-day concepts digestible by all without any effort. (Marcus Solomon).

Conflict is resolved by adhering to clear principles and values. Very occasionally I have to discipline people – a process I personally find difficult, but with clear values and principles to guide you, potentially negative situations can be made positive (Marcus Solomon). When difficult decisions arise we go back to our values – without fail these provide clarity and a way forward. When you boil down to the core principles and values there is a universal commonality. How we express these provides the points of differentiation. True incorporation of these values is only gained when that expression of principles is a normal part of daily business, in much the same way as the haka for the All Blacks.

*How does your organisational structure and statement of intent reflect Māori values and philosophies?*

Wally Stone believes the vision must become a living culture of the organisation; it must be owned by everyone. It must make sense for the people to own and buy into because people do things they believe in. If you line up all the levels, you are more likely to go forward together. Success comes from making others around you successful.

In terms of board make-up, the company examines a number of factors to select a good multi-disciplinary team. Certain skills and behaviours are taken as givens, such an understanding of core purpose as well as the basic core expertise necessary to reach goals (Wally Stone).

*Do you think a distinct Māori or indigenous brand should be marketed nationally? Internationally?*

We have a real brand, not based on an idea. What we have created is based on at least 1000 years of whakapapa and knowledge – the spiritual essence of Paikea – and these ancestral links breathe life into our brand, we are the living embodiment of our ancestors. Everything stems from rangatiratanga – our governance, whakapapa – the logic, our DNA fashioned by life experiences, wairua tapu – the values that guide us. We say – come on the journey of our ancestors and experience our world, let us be measured by our fruits (Marcus Solomon). I believe we are much greater than a brand, we are a whakapapa, we are the past and the future, our identity is ever evolving and changing. Our brand must be experience driven as it is my firm view that to realise our potential we must take people on the journey through our world (Marcus Solomon).

The power of our whakapapa is to unify people, a South Pacific whakapapa, a Polynesian whakapapa – (Marcus Solomon). Our images, from our company logo on, must always be appropriate, have meaning and add value – both to us and to our visitors alike (Wally Stone).

All our boats have ancestral names and meaning: *Aoraki*, *Te Ao Marama*, *Wheketere* (giant squid), *Makawhiu*, and *Paikea* (our ancestor) – and indigenous designs for each boat give meaning and interpretation to our cultural heritage and whakapapa (Marcus Solomon).

We hope people are comfortable with what we have created, and can express it for themselves. We have had a kuia break out in spontaneous karakia on our boat, and rangatahi on the shore doing spontaneous haka, we have had many religious denominations do there various karakia. It's amazing, and this embellishes cultural interpretations and cultural identity with our Hapū (Marcus Solomon).

The company was lucky enough to cash in on the growth of the free, independent travellers market, and many of these travellers were part of the backpacker market. Backpackers and whale watching were made for each other (Wally Stone). For a company that could not afford much advertising, having its message spread by word of mouth ...was an ideal boost. From there, it widened its base to serve the three target markets it relies on today: young thrill-seekers (many of whom are backpackers); "safe-space" comfort-seekers; and committed environmentalists (Wally Stone).

*What are the reasons for this? e.g., added value to products? improved market niche? statement of identity? cultural recognition and pride? Increased revenue? Other?*

This is a statement of who we are, our business and branding reflects our culture and values (Marcus Solomon).

### **Strategic direction and sustainable development**

"The governance style depends on the strategic direction the board is taking....are they protecting or growing the asset?" (Wally Stone).

Strategic planning is one of the strengths of WWK (Wally Stone).

Today WWK is strongly strategic in approach – planning for the Whaleway centre to become not only the hub of transport, but also of most activities in the town. More coordination is needed between tour operators, transport interests, accommodation, the community, local government planners, and representatives of such agencies as DOC and the Tourism Board (Wally Stone).

A managed approach to tourism development still needs to be taken, so that interests in the town are considered (Wally Stone).

*Is the strategy of your business/organisation just about making profits?*

WWK strives to be the most successful business it can be. Today it is clear this initiative has exceeded all expectations (Wally Stone).

Because of our strategic thinking, the company has not delivered great financial dividends in the short term. Strategies are long-term. (Wally Stone).

Profits have been used to take young people off welfare payments and give them skills for the future (Wally Stone). In the eyes of the tribe, one of the greatest achievements of the business has been its involvement in an alcohol and drug rehabilitation programme in Kaikoura.

*Are there are other responsibilities and goals your business is trying to achieve? e.g., in addition to profits; such as social, environmental, and cultural goals, standards? Can you provide examples?*

The core purpose of WWK is to be successful business and use that success to empower both the shareholders and stakeholders. A stakeholder is “anyone who has a decision-making influence over our operating environment (Wally Stone). WWK stakeholders’ relationships include: shareholders, consumers, the wider tourism industry, strategic partners, business partners shareholders, and Team Whale Watch itself.

Whale Watch is now entirely funded by its own cash flow and growing steadily.

In the Kaikoura community, WWK has stimulated growth in accommodation, restaurants, the retail sector, services, and other sea-based ventures. Predictions are for further large growth.

*Are there any tensions or conflicts between using a western business model with more Māori or indigenous approaches to business?*

No, no conflict – you should always adapt them to your own needs, you should never bind your thinking to one model. There is no one way to manage or run a business. Models are tools – whether I use a hammer or the back of an axe, the nail still goes in (Marcus Solomon). Personalities could be more of a problem in these business models than the models themselves (Marcus Solomon).

*Do you measure company/business performance and success by other factors? such as your achievements and performance in social, cultural, and environmental outcome areas?*

If success is measurable in international recognition, then WWK has done amazingly well, and won a number of international awards in the tourism, heritage, environmental, and sustainability area.

Success means – we can do what we want when we want to, the things we want to do reflect who we are, we are a company owned by Māori, and proud of it (Wally Stone). A Māori organisation is successful when it is seen by its peers to add value to the industry. When the entire industry looks at us as a leader then as Māori we are achieving the ultimate (Wally Stone).

The true health of WWK is measured in terms of its positioning to take advantage of future opportunities, financial position, the quality of its people, and the quality of its analysis and decision-making (Wally Stone). The organisation should grow each year in its own capability, and this will enable it to do bigger and brighter projects (Wally Stone).

A reasonable proportion of our profit has gone back into the company for infrastructure development and to maintain standards (Wally Stone).

An example of advanced Māori technological development is the advanced technology joint project (3D modelling interactive visualisation tools) between WWK and Animation Research, multi-media developer Taylormade media, with support from Technology New Zealand. This has created a virtual “World of Whales tour” .... “a unique underwater habitat in a canyon the size of the Grand Canyon” and puts tourists face to face with the marine creatures in a 2.5-km-deep chasm in the southern Pacific ocean, which enhances the tourists’ experience. This has been a major IT overhaul for WWK, and brings together live real-time data, communications and logistical management systems, to build a whale watch asset management and reservation system designed to streamline everyday operations:

<http://www.arl.co.nz/home.asp>

<http://www.arl.co.nz/content/whalewatch.htm>

<http://www.arl.co.nz/content/businesssolutions.htm>

<http://www.arl.co.nz/whalewatch/>

In the Kaikoura community, WWK has stimulated growth in accommodation, restaurants, the retail sector, services, and other sea-based ventures. Predictions are for further large growth.

Growth requires entrepreneurship. Skills for management include financial operations, legal compliance – and the X-factor. Effective directors must be able to lead and contribute to a team, and to demonstrate this from the top. They must understand and motivate management. They must be able to paint a picture of the future and enable people to grab that vision and realise it. They must also be clear communicators (i.e. simple and precise) and know their own strengths and weaknesses (Wally Stone). In terms of leadership?: Ideal leadership (Wally Stone) for WWK includes being:

- Visionary
- A long-term planner
- Having entrepreneurship

*Are you adopting a sustainable development approach to business?*

WWK adopts a sustainable approach – with both a cultural and spiritual meaning – based on Māori Ngai Tahu values. Since arriving in the area about 850 AD Ngai Tahu has developed a sustainable relationship with all ecosystems and natural resources, including the sea. Ngai Tahu has co-existed with tohora, the sperm whale, for about 1000 years and we intend to live with them for another 1000 years. It is this concept and philosophy of sustainable management that has been fundamental to our activities. There must be enough to sustain life in its spiritual and physical sense.

As land-based services and other adventure tourism activities have grown, a number of other environmentally sustainable activities, many based on marine mammals, have developed off-shore (Wally Stone).

WWK is a marine conservation movement (Wally Stone). Moves by WWK are to protect whales from commercial killing and the resumption of the industrial trade in whale products. The business reinforces the anti-industrial whaling message (Wally Stone) and this in turn reinforces whale preservation, the southern oceans whale sanctuary, and the whale protection stance and strategies endorsed by the International Whaling Commission (IWC). To keep underwater noise to a minimum the catamarans are powered by in-board diesel jet units and have special hull designs.

Visitors to New Zealand measure their experience by the genuine warmth and welcome they receive while in our beautiful country. New Zealanders, on the other hand, welcome and host visitors because of their contribution to enhancing and maintaining our quality of life (Wally Stone).

This requires a fine balance; when it works it can create an unforgettable experience for the visitor and real benefit for the host community. To get this balance right is to create a sustainable future for both visitor and host community (Wally Stone).

At the moment we see no need for triple-bottom-line reporting. We don't need to. If you have to write a report on a good deed – is it a good deed?, where is the mana (prestige, humility) in this if we tell everyone (Marcus Solomon). We are a Charitable Trust and support the community in many ways – we believe it takes our mana away if you report and divulge what is something special and personal between us (WWK) and a family, school, or person; for example, if we gave food to children at school, and this was found out, or if we gave money to a family, how would the school or person feel if we disclosed that information? (Marcus Solomon).

### **Authenticating values**

*How do Māori values, principles, philosophies, underpin your business? How are they translated in actions or portrayed in the business practice?*

In many ways, Māori Hapū values are at the core of our business and the way we do things. For example, it is of greatest importance to manaakitanga (value) our visitors, while exercising kaitiakitanga (responsibility) for Aotearoa (New Zealand) (Wally Stone).

*How do you balance these principles? e.g., business principles versus cultural principles, production and resource use versus environmental, social versus economic? Examples?*

Any potential conflict is resolved by adherence to clear principles and values. When difficult decisions arise we go back to these principles and values (Wally Stone).

*How does your commitment to Māori? to iwi/hapū? beneficiaries? shareholders? affect your business?*

Always. We are committed and have a responsibility to our people, the Kaikoura community, and to New Zealand. This is reflected through our strategic approach, business plans, operations, decisions, and investment in our people, the community, and in the future (Marcus Solomon).

As part a community company, Whale Watch Kaikoura values and appreciates that our future depends on ensuring the magic never disappears. If it did, who would want to come here and, more importantly, who would want to call Kaikoura home? (Wally Stone).

The core purpose of WWK is to be a successful business and use that success to empower both shareholders and stakeholders. WWK strives to be the most successful business it can be. WWK constantly strives to be the best it can. I don't think we can ever say we have arrived or reached our full potential – we just work harder and smarter, and continue to chip away (Wally Stone).

### **Processes and standards**

We have responsibilities under several Acts, including Maritime Safety and marine environmental protection (under the Maritime Transport Act 1994 administered by Maritime Safety Authority, Maritime New Zealand), Health and Safety (Health and Safety in Employment Act HSE 1992 administered by the Occupational Safety and Health Service, Department of Labour), Conservation Act 1987, Marine Mammals Protection Act 1978, and the Resource Management Act (RMA) 1991 and the Resource Management Amendment (RMAA) Act 2005. We comply with a large amount of legislation. As a private company we comply with all company legislation, audits, and reporting (Marcus Solomon).

This is a new industry (Eco-tourism) which is still setting standards and training procedures (Wally Stone). WWK has a comprehensive conservation policy (About us):

<http://www.whalewatch.co.nz/>

In terms of financial responsibility we have audited accounts which are audited annually under the companies Act 1993. WWK appears under the annual Te Rūnanga O Ngai Tahu reports (Marcus Solomon).

Health and safety for our staff and visitors is of paramount importance, and we work hard on standards and performance in this area. We are always thinking of the best ways for our company to be safe and, we encourage staff to do like wise. I see it in the same terms as creating a safe environment for my own family. We take all possible safety steps for staff, which in turn creates a safe environment for our visitors, and this is our responsibility as hosts. We are audited from Accident Compensation Corporation (ACC) – a high levy/premium expense. The outcome of those audits has allowed us to receive discounts based on our record in safety planning and mitigating potential hazards and accidents. The Maritime Safety Authority (MSA) monitors the operation of whale watch vessels and audits all our records and books. We adhere to the MSA and “Safe Ship” standards. We are permitted by DOC to run 4 trips per vessel per day, a total of 16 tours/per day (Marcus Solomon).

In terms of resource consents we have to comply with and work within the RMA 1991 –, and within the district plan as set by the Kaikoura district council, which has a small rating base and limited resources. At the moment we have plans for a new peninsula development – a land-based facility for visitors – that has taken about 3 years to progress. The proposed development has required a variation to the district plan at considerable cost, a process that still has no concrete completion date – but we have to live with that. We have found this process very difficult and expensive; unfortunately, such long time-frames can often result in putting off potential investors (Marcus Solomon).

The majority of procedures and standards are the same as any other tourism business including general compliance issues, and marine regulations. We work with a number of agencies and it is important to develop and maintain good relationships with all external agencies, such as DOC, who are the main regulators responsible for the welfare of marine mammals. Canterbury Regional Council is responsible for all harbour facilities and the new Kaikoura wharf.

All permits for commercial whale watching and other interaction with marine mammals are issued by DOC. A permit is issued for each craft that carried whale watching passengers. DOC has many regulations, and we must meet their requirements. Ngai Tahu successfully challenged DOC not to allow new permits for whale watching to other applicant groups, through a Court of Appeal process in 1995. This appeal centred on the 1987 Conservation Act, which requires DOC to put into effect the requirements of the principles of the Treaty of Waitangi; and the Court of Appeal decided the Government’s Treaty obligation should involve “active protection of tribal interests” and take into account the historical and kaitiaki relationship the tribe has had with Kaikoura.

WWK has committed research funds to gaining a better understanding of whales and the impact on them of tourist activities. We need to think all the time what is best for the whales. WWK has some unique regulatory conditions and is committed to setting standards and training procedures. We develop policy and protocols with DOC, and we work in accord with the Marine Mammals Act. Research and monitoring, including whale location, behaviour and numbers, have been necessary parts of the business, and have provided important baseline data for DOC and other scientists both in New Zealand and internationally.

WWK plays a big part in the community. In August 2002 the whole Kaikoura township (using the brand “Kaikoura close to nature...”) became a Green Globe benchmark community <http://www.kaikoura.co.nz/main/GreenGlobe/>, and voted to move towards Green Globe 21 certification <http://www.greenglobe.org/> in 2003 through best sustainable business practice. Kaikoura is the first community in New Zealand to do this.



WWK received an international Green Globe 21 award (with distinction) in March 1997. This award recognises outstanding progress towards the implementation of environmental programmes that demonstrate excellence.

*What processes are in place to authenticate Māori values, philosophies, tikanga?*

For example, WWK constantly monitors the natural environment for change, stress or danger to whales that could be caused by human activity and interference. Detailed records are kept for each trip, including personalised information on whales location and behaviour. There has been a slow but noticeable increase in whale numbers – within the company’s permitted range of operation – since scientific study began.

*Should a Māori business have a set of cultural standards (e.g., derived through a business plan)?*

We have a distinct set of standards and in particular through our vision to be the destination, experience, and company of choice. Our mission is to identify, deliver and promote “WOW” experiences and also achieve our cultural, social, environmental, and economic goals and objectives, through values such as rangatiratanga. Obviously we are Māori, so by default what we decide to do is a reflection of who we are (Marcus Solomon). If I have to have a set of cultural standards as a Māori business then who am I?

*Would the Māori community, iwi, Hapū, support your statements?, re portrayal of values and authenticity?*

Yes, definitely – we are one with the community. The community are us.

### **Barriers/advantages**

The tourism market is extremely competitive and very volatile (Wally Stone). World events such as 11 September in the USA and SARS in Asia can have a big impact on tourism. Most New Zealand industries and businesses experience volatility. The key is how you manage the volatility and risk. You need to be smart about how you do this – it’s all about attitudes (Wally Stone).

A tourist company or business depends on the leisure dollar and there is a huge amount of choice for international visitors. So you need to understand the market-place and mitigate the risks and turn them into opportunities and profit. A key factor in this process is to have the right mind-set, and WWK adopts “a negatives to positives” approach to compliance and regulations. Compliance must be a natural part of business and built into how the company operates. Compliance issues are built into best practice guidelines to inspire best practice. This in turn motivates and inspires staff to comply, and be positive, entrepreneurial, creative, and innovative (Wally Stone). These days, governance in many organisations seems to be more about protection rather than innovative growth (Wally Stone).

Regulatory changes should focus on improving the business environment in New Zealand. This environment must instil a sense of motivation to succeed and foster entrepreneurship. While government has a role in creating this environment for business, some organisations tend to lose their own focus as far as government is concerned, and treat it as a key driver. “The moment you become reliant on a third party, such as government, you have failed to identify the risk” (Wally Stone).

In terms of government capacity building, the government should invest “where it will get the best returns... we (WWK) must deliver results that justify the resources – this should be the same for government” (Wally Stone).

“We could achieve improved practical results by identifying future leaders, investing in them, and getting them into organisations to shape them for the future” (Wally Stone).

*Is incorporating Māori values and principles in business a barrier or limitation to doing business?*

No. WWK treats barriers as opportunities. By being positive, entrepreneurial, creative and innovative, WWK treats barriers as opportunities (Wally Stone). The company applies quality analysis and smarter planning, which leads to smarter decisions that must be actioned (Wally Stone).

Most businesses currently focus on governance and management to make them risk averse, and everything is designed to minimise and protect the asset. We (WWK) have had to take lots of risks.

Wally Stone believes that a fear of failure is holding back many Māori organisations, but is adamant that “if your motivation to succeed is greater than the fear of failure, you have a greater chance of being successful...if we were afraid of failure we wouldn’t have started....governance appears to be bogged down with measuring performance. This is backward looking – any organisation that wants success must look forward” (Wally Stone).

*How does your business benefit Māori, iwi? hapū? stakeholders?*

I think the region as a whole has seen substantial benefits. Today the town breathes prosperity, with a host of service restaurants and accommodation, as well as dozens of new tourism ventures (Wally Stone). Most of other new tourism ventures in the area are active adventure or eco-tourism.

In the late 1980s, Kaikoura had little infrastructure for growth, few motels, hotels, and restaurants, and these could only just cater for one bus load of tourists. By 1994 Kaikoura had experienced a 700% increase in visitor numbers. To date (2005) approx 30 new accommodation facilities have been built and there are 45 new businesses servicing mainly tourists. Commercial land values are up more than 100%, with residential values up by 50%. The infrastructure (e.g., sewage, waste, water, roads) has been placed under considerable pressure because of economic and population growth that has required a long-term strategic planning approach.

WWK purchased the old disused railway station, refurbished it in 1997, and turned it into a modern facility (now called the ‘Whaleway Station’ – an idea from a creative staff member). This type of refurbishment (\$US500,000 face-lift) has helped regenerate the Kaikoura township. It represents a major investment by the company in the community and is a vote of confidence for future growth.

WWK supports the Ngai Tahu and wider Kaikoura community through the dividends it is able to provide. The result is building and growing community facilities and rebuilding cultural strength and identity. Training is also been a key area in which we have invested.

Whale Watch is now entirely funded by its own cash flow, and is growing steadily. It is the single largest employer in Kaikoura (WWK employs up to 70 people in peak season). WWK has stimulated growth in Kaikoura accommodation, restaurants, the retail sector, services, and other sea-based ventures. Predictions are for further large growth. Success comes from making others around you successful (Wally Stone). WWK provides \$NZ16,000/yr to the Kaikoura Information and Tourism (KITI) for local marketing and information.

WWK has a commitment to education and training. Dividends from WWK go back into the local community and the region (Marcus Solomon). The Kaikoura Centre for Continuing Education provides courses in the marine tourism business. Takahanga, Ngai Tahu’s marae in Kaikoura, has been transformed into an education centre in its widest sense. Education programmes include: te reo Māori, horticulture, marine tourism, forestry, health, youth workers, fisheries conservation, and tikanga and mātauranga. Education has been vital to the expansion of WWK. Joint ventures are planned with two international organisations, National Geographic and the Smithsonian Institute, to set up a shore-based information and learning centre on marine science and cultural education. WWK sponsors schools, local sports clubs (e.g., rugby, basketball), health (e.g., hospice), the local

fire service. We also consider funding to cultural needs, for example, kaumatua, marae, and papakainga funding.

At a company level, Wally Stone (CEO) approves all grants and scholarships. At a charitable trust level, all people share in Whale Watch's success – to provide empowerment to the people. “We are audited on all charitable donations, grants, but we don't make all grants known – no need to report widely on all these details. This information is confidential between us and people or agencies receiving the grants – how would they feel, a kid or family, receiving money that is made public – no, we keep that information just between WWK and the people who receive it.” (Marcus Solomon)

*Can Māori business achieve competitive advantage based on unique cultural dimensions of governance and performance?*

Absolutely, we are living proof (Marcus Solomon).

### **Intellectual property issues**

*Is the intellectual property (IP) of products and services an important consideration or issue in your business?*

Yes. The Whale Watch logo is a registered trademark®, it is special to us, our names are an important part of the business, we use resources to keep our identity our own (Marcus Solomon).

*What IP mechanisms do you have in place to protect your business knowledge, products, services?*  
Trademarks.

*What forms of IP protection are used in the area of cultural heritage? Mātauranga? Other forms of cultural knowledge?*

I believe the debate on intellectual property needs to be defined and put in place at marae level, Takahanga being the official base of Ngati Kuri. For example, the marae gives permission for the use of whakapapa on behalf of the tangata whenua and Hapū who own the intellectual property and the cultural knowledge as it pertains to each family. IP can take many forms, such as issuing a rahui (regulation) on the marine or coastal environment to sustain or protect resources, taonga. For any rahui, MAF, the district council, and the rūnanga are involved together. Our mana whenua mana moana status is based on our whakapapa, 1000 years of knowledge, and we need to celebrate and enhance it. If your governance and tikanga is in place, you are not going to step on anyone's toes (Marcus Solomon).

### **Conclusions**

Whale Watch Kaikoura is one of New Zealand's most distinctive and successful tourism ventures. It has received numerous national and international awards recognising its success and excellence in both tourism and environmental responsibility. In 2005 Whale Watch Kaikoura was winner of the New Zealand Tourism Operator of the decade. It continues to be a leader in the tourism sector, in New Zealand business, and in Māori business, through its strategic approach to business, marketing, leadership, innovative development and growth. As another case study in this research it emphasises the significance of values and principles in business, and the core nature of Māori values in successful Māori businesses, leadership, branding and marketing.

### **Acknowledgements**

This work was carried out under Objective 3 of the FRST programme *Māori Business branding: achieving competitive advantage in global markets*, short title – *Waka Tohu*. Special thanks to Marcus Solomon, General Operations Manager, and Wally Stone, Chief Executive Officer, Whale Watch Kaikoura, for giving this interview and allowing the release of information about their business. The Whale Watch Kaikoura home web site can be seen at: <http://www.whalewatch.co.nz/home.htm> and the “World of Whales” at: <http://www.arl.co.nz/whalewatch>

## References

Ministry of Commerce 2005: Whale Watching in Kaikoura, New Zealand – Bigger than Moby Dick: Whale Watch Kaikoura. Case study for APEC Tourism and the Environment Best Practice. Wellington, Ministry of Commerce. <http://www.whalewatch.co.nz/>

Ministry of Tourism 2005: Towards 2010 –Achieving the Tourism Strategy’s Vision. Wellington, Ministry of Tourism. 5 p.

<http://www.tourism.govt.nz/stargy/str-update-2003/str-stratupdate-towards2010.html>

Ministry of Tourism 2001: The New Zealand Tourism Strategy 2010 (NZTS 2010). New Zealand Tourism strategy was launched in 2001. Ministry of Tourism, Wellington, New Zealand.

<http://www.tourism.govt.nz/strategy/>

<http://www.tourism.govt.nz/strategy/str-update-2003/str-stratupdate-towards2010.html>

Ministry of Tourism 2003: The New Zealand Tourism Strategy Update (NZTS 2010). Ministry of Tourism, Wellington, New Zealand.

<http://www.tourism.govt.nz/strategy/>

<http://www.tourism.govt.nz/strategy/str-update-2003/str-stratupdate-towards2010.html>

<http://www.tourism.govt.nz/strategy/str-update-2003/str-update-2003-report/str-update-2003-report.pdf>

<http://www.tourism.govt.nz/strategy/str-reports-2010/str-rep-2010sum.pdf>

Te Puni Kōkiri 2004: Effective governance – Case Study: Kaikoura Whale Watch. Wellington, Te Puni Kōkiri (Ministry of Māori Development). 7 p.

<http://governance.tpk.govt.nz/share/whalewatch.aspx>

Whale Watch Kaikoura 2004: Whale Watch Kaikoura goes to new depths. Press release.

<http://www.arl.co.nz/whalewatch/press.htm>

## Interview complete

This manuscript represents a full and honest summary of all my interview comments made on (date): .....and I have been given the opportunity to limit, change or highlight any personal statements before release or publication of these research findings.

Respondent

Signed.....Date.....

Interviewer.....Date.....

## Key researchers in Objective 3

Garth Harmsworth (Landcare Research NZ Ltd.; Te Arawa, Ngati Tuwharetoa, Ngati Raukawa)

Gail Tipa (Tipa & Associates; Ngai Tahu)

Nadia Kimberley-Ward (FOMA; Nga Puhū)

Catherine Iremonger (University of Waikato; Ngati Maniapoto)

Ropata Taylor (Wakatu Inc.; Ngati Rarua, Te Atiawa, Ngati Tama, Ngati Kuia)

---

## 7. Analysis and Evaluation

---

### 7.1 Analysis and evaluation of case studies

All case studies have been analysed and evaluated, and findings organised into the following key sections:

- Background – a background summary on each Māori business (What constitutes a Māori business? how would you describe the business model?)
- Recognising Māori values in business
- Strategic direction and sustainable development
- Authenticating values
- Processes and standards
- Barriers/advantages
- Intellectual property issues

#### What constitutes a Māori business?

All case studies gave background information about their businesses, the current state of the business, their goals and future directions. A central question raised was what constituted a Māori business? The following criteria are currently being used to define a Māori business:

- Māori operate the business (but really no other differences)
- Māori own the business
- A Māori style of governance and management
- Employs Māori staff
- Focus on Kaupapa Māori

Mason Durie (2002) proposed an alternative over-arching criterion – the business’s contribution to Māori development and advancement. “Does it return dividends to Māori, either through profits or services, does it affirm a Māori cultural identity; does it create employment for Māori, does it create Māori wealth in economic terms or in terms of human capital?” We can therefore examine and define a business from many perspectives and decide what constitutes a Māori business. Many of the answers given below strongly relate to the above definitions. To confirm the above range of definitions, and different perspectives, answers given during the Waka Tohu 2004–2005, case studies include:

“We are first and foremost a wine company, and secondly an indigenous company” (Tohu Wines Ltd).

“At the time we wanted partnership with other Māori wine growers, and the Māori wine groups, NRAIT and Wi Pere Trust (with 20 years experience growing wine in Gisborne and Martinborough), became our partners” (Tohu Wines Ltd).

“However, the most important part of our business is 1) having a quality product, 2) being New Zealand, and 3) being of indigenous culture. Tohu is distinctly Māori and proud to be an indigenous company. We are wholly Māori owned and produce high-quality products. This point of difference separates us from other wine companies” (Tohu Wines Ltd).

“Being an indigenous extended family (whānau) based company is absolutely important. We have to be successful for the whānau, as they are our shareholders. Our focus is to look after and give a return to whānau, “To nurture our whenua, staff, customers, and owners”. How we treat staff and employees, how we carry out decision-making, is part of our values as a company” (Tohu Wines Ltd).

“Wakatu Incorporation is unashamedly a Māori business. It distinguishes itself from a non-Māori business with a strong sense of cultural identity and being owned by Māori shareholders. Corporate support is given to the promotion of Māori values. Staff are a mix of the most professional Māori and non-Māori working together to succeed. Profits are not just the sole measure for success – “we (Wakatu) measure our success in other ways”, “we are not always trying to get the greatest yield on an asset”. Shareholders have an emotional attachment to Wakatu Inc., and the company represents their lifeblood, their ancestry – everyone is emotionally tied up in the business. “People are the most important part of our business – they have to be proud of it” (Wakatu Inc.).

“Biofarm regards their business as being Māori even though not all members of the business are Māori. Their reverence for papatuanuku (land and soil) and their treatment of papatuanuku as a taonga (treasure) underpins their business, and they believe this distinguishes it from a non-Māori business” (Biofarm Products Ltd).

“Being a Māori business gives them an immense sense of pride, which in turns gives mana to the business. It has given Biofarm an incentive to succeed, coupled with the fact that they are a non-typical dairy farming and processing business, and there have always been added external pressures, and expectations by others, that they would fail – especially inside the industry – because of their unconventional philosophy (Biofarm Products Ltd).

“Ngai Tahu Seafood (NTS) is a wholly owned subsidiary of Ngai Tahu Holdings Group, which in turn is a wholly owned subsidiary of Te Rūnanga o Ngai Tahu (TRONT). This iwi’s tribal territory is defined in the Te Rūnanga o Ngai Tahu Act 1996 but in general terms includes approximately three-quarters of the South Island of New Zealand” (Ngai Tahu Seafood Ltd).

“Although being a Māori business owned by an iwi authority distinguishes the company from others, Gavin Holley does not believe “That it’s held us back from adding the value” (Ngai Tahu Seafood Ltd).

“At an operational level it means that NTS is focused not just on profits but also on long-term goals. Importantly, being a company owned by Ngai Tahu, NTS sees itself as being a Māori business”(Ngai Tahu Seafood Ltd).

“NTS is a Māori business because the only reason it exists is because of ‘The Claim’. The customary rights that pre-existed and were recognised by the Crown gave rise to the commercial right. It [NTS] has arisen very much from the customary right. Secondly, all the assets, all the funding have come from its Ngai Tahu stake holders. We are in fact entrusted with the proper commercial operation of those assets for the Tribe. We report back solely, 100% to our shareholder and Ngai Tahu stakeholders” (Gavin Holley, 2004)” (Ngai Tahu Seafood Ltd).

“Being a tribal-owned business means there are differences in the way NTS operates and is expected to operate. These differences influence the strategic direction, planning and growth of the company” (Ngai Tahu Seafood Ltd.).

“NTS is cognisant of that fact that it manages Ngai Tahu’s seafood interests, which means they are in charge of a Māori resource. This fact strongly affects their business practices, with Māori principles of sustainability and sound environmental practices underpinning the operation of Ngai Tahu Seafood” (Ngai Tahu Seafood Ltd.).

“If shareholding is the criterion for identifying a Māori business, then SJL “most definitely is a Māori business”. Ngai Tahu was for some time the majority shareholder before acquiring the

remaining shares and delisting the Company from the New Zealand share market. “Also it is widely known that SJL is owned by Ngai Tahu” (Shotover Jet Ltd.).

“Ngai Tahu Tourism, which owns Shotover Jet, was described by Rakihia Tau as an investment company. In that regard it is also seen as purely a Māori business” (Shotover Jet Ltd.).

“However, both Adrian and Rakihia drew a distinction between Ngai Tahu Tourism and Shotover Jet and its subsidiaries: Once you start examining the actual investments themselves, or the products, it is difficult to describe them as Māori products or a Māori business. Further, at this point I think the culture of these businesses is not the Ngai Tahu culture right now.... SJL is a commercial, corporate-driven organisation with sensitivity to environmental, social, and ethnicity issues, but we don’t really act any different to any other corporate owned thing ((Shotover Jet Ltd.; Rakihia Tau 2004).

“Team Logistics New Zealand is owned by Greg Whitau who identifies as Māori and sees his company as being a Māori business. He proudly says that Team Logistics New Zealand is the only Māori freight forwarding company operating in New Zealand and the world” (Team Logistics Ltd.).

“The web page of Team Logistics New Zealand explains that the company is driven by three core philosophies (Team Logistics Ltd.):

- People: having the best people in the team to be the best; and Team Logistics New Zealand chooses its people carefully
- Performance: Like any team, Team Logistics New Zealand is only as good as its last performance, so it drive itself to perform superbly.
- Profit. The business is there to make money. Team Logistics New Zealand knows that its customers’ successes will mean its success.

“While many companies, Māori and non-Māori, espouse principles similar to these, it is the way in which they are implemented that truly reflect a Māori kaupapa” (Greg Whitau, Team Logistics Ltd.).

“While Team Logistics New Zealand is in the only Māori freight forwarding company, there are limited numbers of Māori working in the sector as a whole” (Greg Whitau, Team Logistics Ltd.).

“Team Logistics New Zealand represents an interesting case study because a freight forwarder is not the sort of company that immediately comes to mind when identifying Māori businesses working in the global market. Yet, as Greg Whitau explains all businesses use a freight-forwarder” (Team Logistics Ltd.).

“This has collectively given Team Logistics New Zealand, as the only Māori freight forwarding company, a “head start” in the sector” (Team Logistics Ltd.).

“Greg does not see any disadvantages to being a Māori business. Rather he sees it as a positive, and in developing the future direction of the Company is looking at opportunities that will enable Team Logistics New Zealand to grow while at the same time benefiting other Māori businesses by:

- Providing cost-effective and quality freight forwarding services;
- Enhancing the capacity of Māori; and
- Investigating joint ventures with Māori throughout New Zealand (Business Development News 2000)
- Providing possible education and employment opportunities in logistics for Māori.

“The principal barrier to Māori entering the freight forwarding industry appears to be capacity. Team Logistics New Zealand repeatedly emphasises the importance of networks and relationships, which only time spent in the industry can build” (Team Logistics Ltd).

“However, Team Logistics New Zealand can play a key role in helping develop logistics capacity within Māoridom”. “You can be bringing young people up and providing work experience, jobs and degrees in logistics...One of my thoughts is that we would like to provide the sort of infrastructure to support education, employment and the whānau basically”  
 “Enhancing “logistics capacity” within Māoridom through joint ventures and scholarships”  
 (Team Logistics Ltd).

“Investigating links with other indigenous communities around the world. Greg advised that if a single company were the freight forwarder for all Māori businesses in New Zealand it would be the largest in New Zealand”. “The scale of what this would mean in a global environment, given that more and more indigenous communities are active in business, is hard to estimate”  
 (Team Logistics Ltd).

“The Kaikoura operation is distinctive in that it is Māori owned. We are owned by Māori and proud of it. A bonus is that WWK view their work as an expression of their Māori as well as New Zealand “Kiwi” culture”. They also see a role for themselves as leaders in ethnic tourism in the Asia and Pacific region (Whale Watch® Kaikoura Ltd).

“The success of WWK enables WWK to be more Māori focussed (Wally Stone). Success enables WWK to reflect its values, and this is empowering” (Whale Watch® Kaikoura Ltd).

“The marae is very special to us. The marae, however, is not part of the experience WWK offers. While other Māori tourism ventures use these community meeting and activity centres in their business, and despite strong pressure to do this from the Kaikoura community, “we don’t want to commercialise the marae”, “it is not for tour groups” (Whale Watch® Kaikoura Ltd).

“A special challenge for the future of WWK will be to create for visitors, an experience of our Māori world view (Te Ao Māori). We know who we are – the challenge is to take people on that journey with us” (Whale Watch® Kaikoura Ltd).

“A Māori organisation is successful when it is seen by its peers to add value to the industry. When the entire industry looks at you as a leader, then as Māori we are achieving the ultimate” (Whale Watch® Kaikoura Ltd).

### **How would you describe your business model?**

“The company follows a composite business model with elements of western financial systems blended with cultural values and principles, giving the company robust financial integrity, economic performance and quality, integrated with cultural protocols and values (tikanga). The day-to-day operations involve accountability, success, profits, financial prudence, and marketing – all within the cultural or tikanga framework in which we operate. It is the tikanga that sets the ground rules for our operations, and establishes who we are (e.g., responsibility to whānau, family members, sustainable wine growing, way to achieve best practice, etc.”(Tohu Wines Ltd.).

“It is a joint venture company with Wakatu Incorporation, and partners Ngati Rarua Atiawa Iwi Trust (NRAIT, 1993) northern South Island (Te Tau Ihu) and Wi Pere Trust (1899) Gisborne” (Tohu Wines Ltd.).



“We have a small number of staff, <10 directly involved in the company, but a large number of vineyard staff and seasonal workers” (Tohu Wines Ltd.).

“Our business follows a modern western business model but is based on tikanga or cultural values. Traditional values and principles are integrated or entrenched through all aspects of our business, at all levels” (Wakatu Inc.).

“It has 6 subsidiary companies and 7 joint venture companies” (Wakatu Inc.).

“The business in New Zealand is medium to large with just over 400 staff” (Wakatu Inc.).

“Biofarm uses a composite business model that includes elements of Māori culture, tikanga and western business” (Biofarm Products Ltd.).

“The Factory employs 5 full time/part-time workers. Two people are employed on a part/full time basis to administer accounts. There are 4 full-time farm staff and cadets, as well as the owners, Jamie and Cathy Tait-Jamieson and Neville Openshaw (Ngati Kahungunu)” (Biofarm Products Ltd).

“NTS sees itself as following a western business model but recognises that the interaction the company has with the iwi authority as the shareholder, and with tribal members as the stakeholders is arguably something no other company based on a western business model has” (Ngai Tahu Seafood Ltd).

“NTS has its own Board of two Directors”, “NTS employs 200–300 staff but this fluctuates depending on key catching periods. For example, in July, August and September a large number of casuals are employed to process hoki landings” (Ngai Tahu Seafood Ltd).

“SLJ, now part of Ngai Tahu, has a Board of 2 directors and employs approximately 350 staff” (Shotover Jet Ltd).

“One of the key drivers for SJL was the decision to try and structure each business as autonomous profit centres. This means each Manager runs a business that gives them the freedom to be entrepreneurial and act as if they’re owner/operators” (Shotover Jet Ltd).

“Team Logistics New Zealand is a privately owned company that employs 22 staff. One staff member is based in Geraldine and manages in sales in the North Otago and South Canterbury areas through the port at Timaru. The rest of the staff is based at the Christchurch Headquarters” (Team Logistics Ltd).

“Being privately owned by an individual, the company has to focus on the bottom line. Unlike other businesses, including iwi-owned companies that have multiple income streams, Team Logistics New Zealand earns money when it moves freight. To remain in business it has to be successful in attracting customers and meeting their needs competently and at a competitive cost” (Team Logistics Ltd).

“Team Logistics New Zealand is profit driven, like any business. “The bottom line is, if we are not making money why stay in business?” The Company therefore developed and implemented strategies to gain market share and generate profits” (Greg Whitau; Team Logistics Ltd).

“If there is no difference in price, it comes down to service. That is where we make a difference and need to make a difference. I think we do. When we bring new customers on board they are

amazed at the level of service.... You have to be competitive. You can't be dearer than anybody else. We can't be in the middle of the market or at the bottom of the market. We need to do it on service" (Greg Whitau; Team Logistics Ltd).

"It is different because our business is not based solely on materialistic outcomes. Spirituality is the glue that pulls us together, which makes Māori special and it is something that mainstream businesses could take on. Relationships between people, family, and marae – that connection is powerful" (Whale Watch® Kaikoura Ltd).

"The company structure, with a board of five directors and a CEO, was adopted in 1988. It is a standard business structure that enables WWK to carry out its activities" (Whale Watch® Kaikoura Ltd).

"The WWK board has 5 directors. At a corporate level, governance comprises 2 directors (holding 43.5% of shares) from Te Rūnanga o Ngai Tahu, and 3 directors (holding 56.5%) representing WWK – 5 main Māori families. The CEO is Wally Stone, founding director, who took over as CEO in 1993. The company employs about 50 people, 30 of them core staff members. In the peak season WWK directly employs 70 people and supports many extended families" (see <http://www.whalewatch.co.nz>) (Whale Watch® Kaikoura Ltd).

"The company structure of WWK is made up of capital and directors from Te Rūnanga o Kaikoura Trust Board (corporate body of the local tribe, Ngati Kuri) and Te Rūnanga o Ngai Tahu (the corporate body of the major tribal group or iwi, Ngai Tahu, of the South Island" (Whale Watch® Kaikoura Ltd).

"I like to think of western business models as stock standard, nothing special. Our business is more of a rangatira model, you need to understand rangatira culture, derived from whakapapa and rangatiratanga, that's our model, it's leading by example, although adapted from structural principles common to mainstream business. The shape is common to mainstream business, but it is the life you breathe into that shape that is different – you then create a whakapapa for that business" (Whale Watch® Kaikoura Ltd).

### **Recognising Māori values in business**

Implementation of Māori traditional values and principles into ways of doing business?

Which Māori values and principles have been incorporated into business practice?

"We started by putting our toe in the water, "How could we export our culture around the world?" and by knowing that Te Tau Ihu is the best region in the world for wines like sauvignon blanc. Could we put our culture on the front and tell our story by exporting a quality product" (Tohu Wines Ltd).

"Being an indigenous extended family (whānau) based company is absolutely important. We have to be successful for the whānau, as they are our shareholders. Our focus is to look after and give a return to whānau, "To nurture our whenua, staff, customers, and owners". How we treat staff and employees, how we carry out decision-making, is part of our values as a company" (Tohu Wines Ltd).

"The business is built on key principles such as consensus decision-making, achieving quality, high standards, sustainably managing resources, sustainable development, along with key cultural values and principles such as whānaungatanga, kaitiakitanga, and manaakitanga. We have a responsibility to our whānau and to all Māori to succeed, prosper, and maintain cultural integrity. We help communities by providing employment, training, education grants, and caring for the land. Our business is built on sustaining natural resources through cultural

practices such as kaitiakitanga, using Māori and environmental principles to look after the environment, to care for the land, the whenua, through good practice and sustaining natural resources like soil and water. Examples include planting native trees on our land, especially in steeper less-developed areas, or in culturally significant areas, or respecting the wishes of our shareholders, our whānau, to retain culturally significant areas of land” (Tohu Wines Ltd).

“Being Māori and indigenous is of the utmost importance to Wakatu. This is our point of difference from other organisations – this is what makes us unique, special. The foundations of our organisational values are on strong Māori cultural principles” (Wakatu Inc.).

“Corporate support is given to the promotion of Māori values” (Wakatu Inc.).

“Our business follows a modern western business model but is based on tikanga or cultural values. Traditional values and principles are integrated or entrenched through all aspects of our business, at all levels” (Wakatu Inc.).

“Tikanga gives us our policies and procedures. Whakapapa, our ancestral lineage, is there by right. Tikanga and Māori history are very important to us, as are responsibility, respect, honesty, integrity, redistribution, and reciprocity” (Wakatu Inc.).

“Some of the key cultural values and principles include: whakapapa, whānaungatanga, rangatiratanga, mana whenua, mana moana, kaitiakitanga, manaakitanga, awhinatanga, kotahitanga, mauri, wairua. These are traditional cultural principles based on our ancestry and form an important part of the way Wakatu operates” (Wakatu Inc.).

“The whakapapa (ancestral connection) of our business is the same whakapapa of our stakeholders and this gives us direction”, “Stakeholders therefore have direct input into the planning and corporate direction of Wakatu Inc. The business benefits shareholders, Māori, the wider community in many ways” (Wakatu Inc.).

“Our Māori shareholders let us know when they don’t like something or when they feel it doesn’t adequately follow cultural values. Our shareholders are at the top and management and staff are below, not the other way round. We also have strategies to take into account mauri, tapu and noa” (Wakatu Inc.).

“Our web pages about our business provide some of this information on cultural values (tikanga)” (Wakatu Inc.).

“Their reverence for papatuanuku (land and soil) and their treatment of papatuanuku as a taonga (treasure) underpins their business, and they believe this distinguishes it from a non-Māori business” (Biofarm Products Ltd).

“We do not experience any tensions or conflicts between using a western business model with a more Māori or indigenous approach to business as they believe the key to survival is improvisation – whakakotahitanga” (Biofarm Products Ltd).

“On the Māori side, we employ the philosophy of “taking from the past (Māori values) to carry into the future”, for example, using ancient Māori knowledge of cosmology and the more recent knowledge of our great-grandfathers who farmed the land and whose knowledge and records helped us to plan for and cope with damaging floods, such as those in February 2004. Our business operates within these natural environmental processes and cycles” (Biofarm Products Ltd).

“At Biofarm all people are treated like a whānau/family; most workers actually are whānau/family. Kaitiakitanga and whānaungatanga is practised by ensuring that the health of both the physical and spiritual dimensions of the people, animals and papatuanuku is nurtured. The soil/whenua/farm is without question regarded as a taonga tuku iho: the farm has been in the Tait-Jamieson family for several generations” (Biofarm Products Ltd).

“Māori values are vertically integrated into the organisational structure” (Biofarm Products Ltd).

“They (Māori values) are incorporated throughout the business, from the treatment of soil to the animals in their care, from the people who are associated directly and indirectly with their business, to the products that have health benefits for their consumers” (Biofarm Products Ltd).

“Respect, integrity, trust, kaitiakitanga and tino rangatiratanga are the key principles on which the business is built. These principles are traditional iwi Māori principles. Other values employed are” (Biofarm Products Ltd):

- Whakapapa
- Whānaungatanga
- Manaakitanga
- Awhinatanga
- Wehi
- Taonga tuku iho

“NTS is cognisant of that fact that it manages Ngai Tahu’s seafood interests, which means they are in charge of a Māori resource. This fact strongly affects their business practices, with Māori principles of sustainability and sound environmental practices underpinning the operation of Ngai Tahu Seafood”. “I would argue we would be more conservative in the way we operate” (Gavin Holley; Ngai Tahu Seafood Ltd).

“Māori values are reflected in the way that NTS markets itself to the world. The message they want to portray is of a successful seafood company with a product of the highest quality that is sustainable and plentiful” (Ngai Tahu Seafood Ltd).

“While the key philosophy of NTS is to add maximum long-term sustainable value for the benefit of its shareholder (TRONT) and stakeholders, NTS realises this must be achieved in a responsible manner, which is where the tribal value of kaitiakitanga comes through: “We’re looking after the resource for the long term, so we’re not interested in over fishing for short-term benefits, that’s not what we wish to do. These two philosophies work hand in hand. We translate it into respect. It’s respect for what we need to do for our stakeholders. It’s respect for the fish. It’s respect for the environment. It ends up being a respect for the customers and what they require, so that we can maximise that return at the other end” (Gavin Holley; Ngai Tahu Seafood Ltd.). “NTS believes in the traditional practice of sustainable fishing to ensure resources will be there for future generations” (Ngai Tahu Seafood Ltd).

“However Adrian and Rakihia both expected the values on which the Company is based will change – as Adrian explained, “SJL operates by a certain set of values at the moment. That will change over time as Ngai Tahu values are absorbed into the organisation. I don’t think that will be better or worse, it will just be different. They’re both good sets of values, and I think it will work for the organisation either way” (Shotover Jet Ltd).

“We’ve developed values that we operate from in this business. I’ve never actually mapped them against the Ngai Tahu values but I can’t imagine they’d be too different” (Shotover Jet Ltd).

“It’s really just about being results focused. A real sense of achievement is one of our key values, so we really want to create an environment where we’re achieving and getting great results...Respecting people and the environment is the second one. Learning and growing all the time as individuals is the third. Getting involved in the business – that’s number 4. Being proud of what we do – that’s the 5<sup>th</sup>, and having a lot of fun along the way is the 6<sup>th</sup>. They sound quite simplistic and trite but to the people who are working in the organization they are important values. We try and model our behaviour around those. These are our promises we made to each other as a team” (Shotover Jet Ltd).

“Kaitiakitanga – respecting the sensitive environments in which they operate – is a fundamental duty of all SJL operations” (Shotover Jet Ltd).

“The web page of Team Logistics New Zealand explains that the company is driven by three core philosophies”:

- “People: having the best people in the team to be the best; and Team Logistics New Zealand chooses its people carefully
- Performance: Like any team, Team Logistics New Zealand is only as good as its last performance, so it drive itself to perform superbly.
- Profit. The business is there to make money. Team Logistics New Zealand knows that its customers’ successes will mean its success” (Team Logistics Ltd).

“While many companies, Māori and non-Māori, espouse principles similar to these, it is the way in which they are implemented that truly reflect a Māori kaupapa” (Team Logistics Ltd).

“Wally Stone believes for the vision to be successful it must be “a living culture of the organisation” (Whale Watch® Kaikoura Ltd).

“As a business we have a unique ownership structure and philosophy and we are able to give effect to these values and culture because we are successful – we are empowered to make decisions” (Whale Watch® Kaikoura Ltd).

“We have 3 key principles:

- Everything must be culturally acceptable
- Economically viable, and
- Environmentally sensitive – it cannot deny future generations”

“These principles come from our culture, we want to live here for another 950 years” (Whale Watch® Kaikoura Ltd).

“Our principles and values are derived from our culture and heritage. Some of most important values are:

- Whakapapa (ancestral lineage, links, cultural heritage)
- Manaakitanga (host, value)
- Kaitiakitanga (guardianship, responsibility)
- Whānaungatanga (family, relationships)
- Mana (prestige, authority)
- Rangatiratanga (empowerment, identity, strength)
- Kotahitanga (unify, reach consensus, include people in decision-making)” (Whale Watch® Kaikoura Ltd).

“Whakapapa, rangatiratanga, whānaungatanga – when you normalise these values through actions, people will understand the values you are expressing, these underlie life values, common sense values” (Whale Watch® Kaikoura Ltd).

### **Marketing and indigenous branding**

Do you think a distinct Māori or indigenous brand should be marketed nationally? Internationally? What are the issues?

What are the reasons for indigenous branding? e.g., added value to products? improved market niche? statement of identity? cultural recognition and pride? Increased revenue? Other?

“Wakatu Inc. wanted to grow, produce, and market world-class wines under a brand name, finally agreed as Tohu Wines. We started by putting our toe in the water, “How could we export our culture around the world?” and by knowing that Te Tau Ihu is the best region in the world for wines like sauvignon blanc. Could we put our culture on the front and tell our story by exporting a quality product” (Tohu Wines Ltd).

“All national and international marketing for a Māori or indigenous brand needs to be carefully controlled and professionally marketed by each company. Tohu tells its story to the world through the label and the name Tohu, marketing our brand as an indigenous quality product to the world. The main reasons we see for indigenous branding are to make the product unique, to be proud of our Māori culture, to add value, and to associate the product with quality and excellence” (Tohu Wines Ltd).

“Retaining control over an indigenous brand is extremely important to us and represents a lot of hard work to achieve a brand associated with quality, values, and integrity (Wakatu Inc.).

“We don’t believe there should be a distinct Māori or indigenous brand marketed nationally or internationally. Each brand should be developed and controlled by a company or business. Wakatu has its own guidelines in place. We have our own indigenous brand (one of the first indigenous brands in the world) – Kono: our gifts from the land and sea, “Hua a te whenua me te moana”. The key purpose of Kono was to leverage distribution channels from one product and apply it to another. “Kono is now being used to sell our fruit, our seafood, wine and spring water. The brand has taken many years to develop. We developed this under a strict and comprehensive cultural process, and a large number of procedures/steps were followed. There is no need for other support structures, because we operate the business ourselves and use collaborative marketing to position the brand. Once the Kono brand has been established among our own companies we will allow some other Māori groups to use the brand, under certain controls, by leveraging on our brand equity and relationships. For this to be considered, strict quality and cultural standards must be in place” (Wakatu Inc.).

“It is also important to establish a unique brand that will add value to products” (Wakatu Inc.).

“It is a concern that too many indigenous brands could be detrimental to the market” (Wakatu Inc.).

“Domestically there is only a small target audience for a distinct Māori or indigenous brand. If such a brand is to be marketed internationally, more research is needed to determine its value as an indigenous brand”. “Such branding would also depend on the market and the type of product”.

“Māori branding would be more beneficial to the exporters for their own networking and collective” (Biofarm Products Ltd.).

“Other benefits of this type of branding, she believes, are “improving the market niche, infusing pride into the product and making a statement of identity” (Biofarm Products Ltd.).

“Branding itself was seen by NTS as a potential issue” (Ngai Tahu Seafood Ltd.).

“It is not clear to NTS whether being an indigenous company provides marketing advantages” (Ngai Tahu Seafood Ltd.).

“I believe that NTS is trying to make sure that we maintain the value of the product all the way through, that we deliver it to the market in mint condition, that we present it as best as we possibly can, and that we sell it to all the right markets at the right price. All this is very time consuming but very important. Ultimately, that’s what differentiates us from everyone else, because everyone else in New Zealand, the bigger seafood companies, they’ve all got quota, they’ve all got boats, and they’ve all got plant. So what is it that’s going to make us different? Ultimately it’s going to be the market. The way that we act in the market is going to provide the true differentiation. When we do put the product into the markets we want to make sure we sell our products for the price we want. We can do a lot to brand our product and add value to it.” (Gavin Holley, Ngai Tahu Seafood Ltd).

“NTS has previously sought to change the logo of Ngai Tahu Fisheries Ltd because customers do not view fishhooks positively. Many international fishing companies have turned away from the use of a fishhook as a logo, but this remains an issue for the tribe as it is also a cultural symbol. Gavin Holley adds, “If you were to ask me if we should put a fishhook on a retail packet of seafood, I’d say no”. Most consumers worldwide would not want to see a fishhook on their packaging (Ngai Tahu Seafood Ltd).

“Throughout their marketing strategy NTS promotes not only a quality product but also a Māori product, such as soups and sauces under the name Nature’s Bounty, also carry the House of Tahu brand. Both of these brands show the commitment to promote Māori in the international market, which has many benefits for Ngai Tahu and for other Māori businesses” (Ngai Tahu Seafood Ltd).

“NTS has looked at branding opportunities in the USA but “to date there has been no great interest in Māori branding” (Ngai Tahu Seafood Ltd).

“NTS has looked at the opportunities in Europe. There has been *some* positive reaction to eco-indigenous branding but only if there is no price differential. At present, eco-indigenous branding is hard to promote, and NTS still believe that for many products, price and quality are the main differentiators – not just brands” (Ngai Tahu Seafood Ltd).

“NTS experience has shown that there is much competition between Australian and New Zealand product” (Ngai Tahu Seafood Ltd).

“In the domestic market, there is may be an opportunity for indigenous branding. However, anecdotal evidence indicates that “the preference of the consumers and buyers is often not to have indigenous labelling or iwi affiliations on the front of the product and more important to show it as a high-quality product, for example the House of Tahu symbol is placed on the back of the soup packs and is not the leading label on the product” (Ngai Tahu Seafood Ltd).

“While the Company would like to “think it does provide us with an advantage in global markets”, it has been unable to realise that to date. Some examples were provided to highlight the challenges NTS is confronting within the fishing industry” (Ngai Tahu Seafood Ltd).

It is not clear to NTS whether being an indigenous company provides marketing advantages. While the Company would like to “think it does provide us with an advantage in global markets”, it has been unable to realise that to date. Some examples were provided to highlight the challenges NTS is confronting within the fishing industry.

**Abalone:** The New Zealand's paua is considered to be at the lower end for quality. The highest quality product is Mexican, then Californian, then Australian, then South African. New Zealand has to bleach the product to get the colour right, because the customers prefer golden or red abalone, which is the colour of Mexican and Californian abalone. The product is canned to extend shelf life and because in Asia refrigeration is not widely available. A canned product can be transported throughout Asia and can be safely left on a shelf for 2 years without deterioration. In Asia there are many house brands and NTS needs to carefully research any branding strategy used in Asia, especially in a market the size of China.

NTS says that Hong Kong traders in abalone are likely to have little knowledge of NTS but will know the pack house handling NTS product and whether it has a good reputation and produces quality products. The "brand" every consumer checks is that of the pack house. (Ngai Tahu Seafood Ltd).

**Lobster:** Lobster was presented as an example of a product that could not readily be physically branded. The attachment of tags has been investigated, but lobsters are exported in bins and are put in new tanks when sent to the market. Ultimately they end up live in yet another tank. The wholesaler or distributor wanting the product is not necessarily interested in the original owner. Branding is not a consideration. Quality and price are of first importance (Ngai Tahu Seafood Ltd).

"With respect to an indigenous brand or form of accreditation, the company felt that, although there is definitely room for indigenous branding, it probably needed to be assessed on a case-by-case basis. They believed there would be issues about how and where it is applied as it is quite a complex area. As NTS pointed out, companies are still trying to come to grips with "the very sophisticated branding that goes on in the global economy" (Ngai Tahu Seafood Ltd).

"NTS described itself as "a young small business that is still learning" (Ngai Tahu Seafood Ltd).

"The different levels of branding need to be considered from an NTS perspective. For NTS, as a tribal business, there is also the issue of corporate branding, i.e. the tribal brand NTS recognises as significant to Ngai Tahu whanui because it "tells people we are Ngai Tahu". There is product branding for the seafood products themselves and then there are labels in use, which means it is necessary to understand the difference between a brand and a label". (Ngai Tahu Seafood Ltd).

"NTS recognises the need to understand what the markets accept or value. In other words, how can NTS maximize the value of each of its products in each of its markets? To complicate matters further, NTS works with some products that are not readily capable of being branded, for example a live eel in a tank in Asia" (Ngai Tahu Seafood Ltd).

Branding: "While recognising that opportunities do exist, NTS believes a case by-case assessment is necessary" (Ngai Tahu Seafood Ltd).

"SJL markets itself locally and internationally" (Shotover Jet Ltd).

"SJL markets throughout New Zealand to attract tourists as they move through the country, before they make their decision to buy. A lot of marketing is undertaken in Queenstown as customers often make purchasing decisions on the day or the day before they use a product. Some customers come through traditional tourism channels, such as the Inbound Tour Companies. For example, some customers purchase a package tour of New Zealand, making purchasing decisions through their local travel agent when they have decided to visit New



Zealand” (Shotover Jet Ltd).

“SJL international markets include: the United Kingdom and Germany, as the two key European countries; the United States; Japan, China, Korea, Taiwan and Singapore are other important markets. A large amount of marketing is undertaken in Australia, but very little at this stage in South America. Australia is the single biggest market. India is an emerging market where a lot of work is currently being carried out” (Shotover Jet Ltd).

“SJL’s marketing strategy differs depending on the product. Put simply, they believe it is necessary to understand what the customer wants before developing the matching product. Selective and targeted marketing strategies are implemented and SJL identifies the key New Zealand suppliers and then focuses their marketing endeavours on each of them” (Shotover Jet Ltd).

“SJL recognises that it is one tourism company within the New Zealand Tourism Industry, and must be aware of international, national and local contexts. In the context of the worldwide tourism, SJL contends that New Zealand Tourism needs to be selective about how it markets the country as a destination. Individual company products are again at a lower level so they have to be more selective” (Shotover Jet Ltd).

“SJL is part of Ngai Tahu Tourism, which is perceived by SJL as offering competitive advantages, including its relationship with the Crown. The Ngai Tahu corporate brand is also seen as providing SJL with leverage in terms of relationships. But SJL was quick to identify that it was the Ngai Tahu corporate brand that was potentially important to them rather than a more generic Māori brand” (Shotover Jet Ltd).

“If you talk to most of the people in the South Island they are generally comfortable dealing with Ngai Tahu, be it on property tourism or seafood-related issues” (Adrian Januszkiewicz; Shotover Jet Ltd).

“Because of the way people work in that business, the way they have been behaving for years has created a sense of integrity and respect and straight dealing. That sort of stuff ends up building the Ngai Tahu brand, as a commercial business... When you talk about branding, a lot of the time branding is just about people. The Ngai Tahu commercial brand in the South Island has started to gain some real traction because they have a lot of people working in the business, who are building integrity and trust. But it is the Ngai Tahu brand we’re talking about as opposed to being branded Māori” (Adrian Januszkiewicz; Shotover Jet Ltd.).

“We know Ngai Tahu has a long-term need to develop relationships in the South Island, so we can’t end up screwing people today and expect to have a good long-term relationship with them tomorrow. We’re generally working with people we trust, and we know we can have a long-term relationship. If that means building a relationship with their fathers and their sons and daughters then that’s what we’re doing” (Adrian Januszkiewicz; Shotover Jet Ltd).

Rakihia Tau explained there were two types of “Māori branding” that could be used to SJL’s advantage in the future” (Rakihia Tau; Shotover Jet Ltd):

- “Using a Māori brand as a secondary brand – Opportunities to add “an X Factor to a product” have been identified by SJL. What you can do is talk about the history and myths associated with a product. I think the SJL will probably head down that route and add in a Māori Brand... You can dive into the actual tribal history... That gives a product the X Factor and is one type of branding strategy. But the important thing that we’re saying there is that it is product led – it is not a top-down approach. But it is a secondary brand. The natural attraction is the primary brand and the secondary brand value (the X factor) is the

human history” (Rakihia Tau; Shotover Jet Ltd).

- “Using a Māori brand as the primary brand – This type of branding is to have a product that is purely Māori. Arguably Tamaki Tours represents this type of product. SJL believes that it could go down that route as well with one of its products. But as was pointed out, I don’t think we are there yet” (Rakihia Tau; Shotover Jet Ltd).

“SJL did not see any real advantages to be gained from the concept of indigenous branding” (Shotover Jet Ltd).

“They explained they de-emphasise the fact they are a group of tourism companies and instead focus very strongly on product branding, for example: “SJL is a ‘Rock ’n’ Roll’ sort of brand and we focus really strongly on promoting that product as a brand.... The Ngai Tahu business is very strong eco-tourism – environmental with a hint of the ethnicity”. “Although it is a nice brand we focus really hard on, to a traveller from the UK it means nothing”. “As much as we’d like it to – it doesn’t”. “We find that they relate much more to the product that they might be doing” (Rakihia Tau; Shotover Jet Ltd).

“For Māori branding or Māori accreditation both Rakihia and Adrian believed caution has to be exercised”: “I can’t see any logical reason at this stage for it in terms of what we will do in the future. We will try and develop our own brands and make a success of those. Once they are a success we might consider a Māori accreditation and/or a Māori brand. But at this stage I can’t actually see any competitive advantage to our business, with such a brand, especially if we’re trying to create a Ngai Tahu corporate brand as well” (Rakihia Tau; Shotover Jet Ltd).

“Rakihia and Adrian both emphasised the difference between logos and brands”. “I think one issue about branding, is that it’s not about the logo – which I think people tend to focus on – it’s about understanding the customers and the market, and how that logo will add value to what you do. The strategy will drive the logo, not the logo drive the strategy, which I notice happens a lot... You can’t adopt or inherit a brand. You have to build a brand” (Rakihia Tau; Adrian Januszkiewicz; Shotover Jet Ltd).

“If there was this Aotearoa Brand that was the Māori brand for New Zealand, you can’t say, “Oh, good, I’m going to start a tourism product and adopt that brand because it’s going to add value to my business”. It’s actually the other way around. If I start a business that has a brand, it will become a good brand if I feed it and develop it through providing a quality service, getting good customer feed back, and providing the right sort of marketing distribution. But the Māori brand is nothing on its own. When you are talking about a Māori Brand, it will end up being a fabulous thing if everyone feeding the brand is doing a high quality job. But the reality is, with an indigenous brand right across the country, how are you going to get all the people to do a quality job? It’s something you have to be very cautious about it” (Adrian Januszkiewicz; Shotover Jet Ltd).

“This is a statement of who we are, our business and branding reflects our culture and values” (Whale Watch® Kaikoura Ltd).

“Marketing, imaging and branding are all integral strands to the whakapapa of Whale Watch Kaikoura Ltd” (Whale Watch® Kaikoura Ltd).

“WWK has invested heavily in marketing and branding, especially overseas. Marketing was a large budget factor, and travel agents commissions are between 20 and 24%” (Whale Watch® Kaikoura Ltd).

“We have a real brand, not based on an idea” (Whale Watch® Kaikoura Ltd).

“I believe we are much greater than a brand, we are a whakapapa, we are the past and the future, our identity is ever evolving and changing. Our brand must be experience driven as it is my firm view that to realise our potential we must take people on the journey through our world” (Whale Watch® Kaikoura Ltd).

“The power of our whakapapa is to unify people, a South Pacific whakapapa, a Polynesian whakapapa – Our images, from our company logo on, must always be appropriate, have meaning and add value – both to us and to our visitors alike” (Whale Watch® Kaikoura Ltd).

### **Strategic direction and sustainable development**

How can Māori businesses achieve a sustainable competitive advantage based on unique cultural dimensions of governance and performance?

Through what means have principles been incorporated? (e.g., statements of business vision or strategy, development of products and services, interaction with stakeholders, etc.).

#### **Vision**

“Tohu Wines’ vision is to be the premiere Māori export company in the world, specialising in wine. Its mission is to:

- produce and market wines of a world standard
- be outstanding in everything that we do
- nurture our whenua, staff, customers, and owners
- be a successful example of New Zealand’s unique indigenous culture (Tohu Wines Ltd.).

“There is strong vision for the company in the next 10 years and beyond – to grow the economic base and achieve social and cultural goals. Tourism will be a new focus for the company, and we will also expand the area of Wakatu merchandising. Strong communication and networking lines have been established, and supporting other Māori exporters with an indigenous trade channel is important to us. Our land estate can only grow, which is what we want to achieve” (Wakatu Inc.).

“Biofarm’s vision for the next 10 years is to be as sustainable as they were before the flood of 16 February 2004 and to have a succession plan in place” (Biofarm products Ltd).

“TRONT principle strategic document is Vision 2025. The whakatauki in this document reflects the overriding philosophy of tribal development:

Mo tatou a mo ka uri a muri ake nei

*“For us and our children after us”* (Ngai Tahu Seafood Ltd).

“The strategic planning horizon of NTS is 5 years, although the marketing strategy, which is more specific, has a 3-year timeframe. The planning of NTS is undertaken within the annual and strategic planning processes prescribed by Ngai Tahu Holding Group (NTHC) and TRONT. All companies of Ngai Tahu Holding Group underwent a strategic planning exercise in 2003” (Ngai Tahu Seafood Ltd).

“In terms of its vision, in 10 years time SJL wants to be the New Zealand leader in providing natural heritage attractions. SJL defines “natural heritage attractions” as tourist attractions that leverage off unique pieces of geography, scenery and possibly the culture of New Zealand” (Shotover Jet Ltd).

“Team Logistics New Zealand, could be the freight forwarder for all Māori businesses throughout New Zealand. If we were, we would be the biggest company in New Zealand. That

is the amount of business involved” (Team Logistics Ltd).

“Team Logistics New Zealand was established in 1997 with a 10-year strategic plan that understandably was focused on establishing and building the business” (Team Logistics Ltd).

“The Company is 7 years into its 10-year strategy, and to date has achieved what it set out to achieve. It is now in the process of setting its direction for the next 3 to 5 years” (Team Logistics Ltd).

“The original WWK vision was inspired by Paikea, our ancestor. We see our business now as reinforcing the anti-industrial whaling message, believing the whale watch experience is a powerful message against any return to wholesale whale slaughter” (Whale Watch® Kaikoura Ltd).

“In 2010, visitors and their host communities understand and embrace the spirit of manaakitanga (hospitality) while, New Zealanders’ environment and culture is conserved and sustained in the spirit of kaitiakitanga (guardianship), and tourism is a vibrant and significant contributor to the economic development of New Zealand. For Whale Watch Kaikoura this Tourism 2010 vision is also our vision for the future” (Whale Watch® Kaikoura Ltd).

“The 2010 Tourism Strategy is founded on a very simple vision that if realised would make New Zealand a better place for both visitors and locals. It addresses the fine balance of competing interests, priorities and time-frames. What is important in this vision is to manaaki (host, value) our visitors, while exercising kaitiakitanga (guardianship, responsibility) for our environment and for Aotearoa” (Whale Watch® Kaikoura Ltd).

“WWK is not standing still. To stay at the forefront of sustainable, indigenous, and ecological tourism, WWK will be looking to add further quality and service to its tourist packages. We were seen as trailblazers, and we want to stay there” (Whale Watch® Kaikoura Ltd).

### **Present and future markets?**

“In New Zealand we aim at the high end of restaurants. Internationally we export to: America – USA, Canada; Europe – the United Kingdom, Ireland, Denmark, Netherlands, Sweden, Germany, Belgium, Luxembourg; in the Pacific – the Cook Islands. Future markets being developed in Australia, Italy, Russia, and the Czech Republic” (Tohu Wines Ltd).

“About 90% of Wakatu’s products are exported to international markets, the biggest including USA, Australia, UK. Other markets are becoming increasingly important: Canada, Switzerland, South Africa, France, India, Ireland, Spain, Hong Kong, Korea, Japan, China, and Germany” (Wakatu Inc.).

“Biofarm contracts 13 distributors throughout New Zealand to distribute their products into supermarkets, health food and service stores. Periodically Biofarm market their products internationally to Australia and USA to protect trademark registration” (Biofarm Products Ltd).

“The company exports to most major world markets including North America, Europe, Australia and Asia, and has developed innovative high-quality products, e.g., an award at the 2002 International Boston Seafood Show for its Mussel and Parsley soup. Vertical integration means that NTS has the ability to control the quality of the seafood they market from the sea to their clients, be they domestic or international” (Ngai Tahu Seafood Ltd).

“Overseas tourists make up a large part of their customer base” (Shotover Jet Ltd).

“SJL international markets include: the United Kingdom and Germany, as the two key European countries; the United States; Japan, China, Korea, Taiwan and Singapore are other important markets. A large amount of marketing is undertaken in Australia, but very little at this stage in South America. Australia is the single biggest market. India is an emerging market where a lot of work is currently being carried out” (Shotover Jet Ltd).

“Put simply, a freight forwarding company can “pick a product from a shelf anywhere in the world and put it on another shelf somewhere else in the world” (Greg Whitau pers. comm. Team Logistics Ltd).

“The only Māori owned freight forwarder operating in New Zealand, Team Logistics New Zealand operates both domestically and internationally, managing the export and import of air-freight and sea-freight, customs brokerage and warehousing and distribution” (Team Logistics Ltd).

“Although being based at Christchurch Airport, moves products through most ports” (Team Logistics Ltd).

“In terms of operating in the international market, it’s about developing strong relationships with overseas companies and developing strong relationships with the right agents overseas, e.g., Maersk Logistics is the largest shipping company in world ... For Maersk Logistics we are their freight forwarding agent here in Christchurch” (Team Logistics Ltd).

“The company has grown from a small business to a medium-sized one. Company turnover is approx. \$3 million/yr, with assets now around \$2.5m, while shareholder funds stand at about \$2 million. . WWK is now entirely funded by its own cash flow, is growing steadily, and is now the largest employer in the Kaikoura. It has been responsible for huge increase in tourist visitor numbers to Kaikoura:

1987: 3 400

1995: 88 000

2004: 200 000

(Whale Watch® Kaikoura Ltd).

“In 1995 the company shared the Whale Watch experience with 40 000 people, 90% of whom were from outside New Zealand. Expectations are for 50 000 visitors to WWK in 2005. In the Kaikoura community WWK has stimulated growth in accommodation, restaurants, the retail sector, services, and other sea-based ventures. Predictions are for further large growth. (Whale Watch® Kaikoura Ltd).

“Of those who share the experience with WWK, 90% are from outside New Zealand” (Whale Watch® Kaikoura Ltd).

### **Sustainable development**

“Social, environmental, and economic goals and standards are all important to Tohu, not just the making of profits. We feel we have a responsibility as one of the biggest companies in the region. We believe we are socially responsible; we share and distribute the wealth of the company back to the wider community in many ways. More directly, money goes into creating employment, and it also goes into education – each year 25 educational scholarships are awarded. Other socially important areas are delivering training programmes that build the skills of people associated with the company. Training leads people back into employment, and into the industry, and those whānau and other members receiving training can become skilled and can contribute professionally to the wine industry” (Tohu Wines Ltd).

“Tohu are adopting a sustainable development approach to business and believe that underpins the business through adherence to good practice and sustainable management of the land (whenua). The vineyards have to be sustainable – it is our main concern. If we don’t look after our land (whenua), we can’t grow our wine, and then can’t provide a return to whānau shareholders” (Tohu Wines Ltd).

“The strategic direction of Wakatu is not just about making profits – many other areas are important to us. We have a responsibility to achieve social, environmental, and cultural goals and sustainable development. We will be exploring and developing systems to measure, monitor and report our performance in these areas” (Wakatu Inc.).

“We are adopting an absolutely sustainable development approach to business: that is the way we operate. For example, industries such as aquaculture, wines, crops, are all focused on replenishing the resource, making sure the resource is sustained for future generations, otherwise we don’t have a business. We have an obligation to our whānau and shareholders to sustain natural resources for future generations. Principles such as kaitiakitanga are very important to us”. (Wakatu Inc.).

“Biofarm adopts a sustainable development approach to business. The strategy for Biofarm is not just about making a profit; it is also about achieving a sustainable environment and ensuring that the business is socially responsible and economically viable” (Biofarm Products Ltd).

“Biofarm takes a holistic approach to business and believes one element should not be compromised for another” (Biofarm Products Ltd).

“We view the business in the long term, which is to strive for organic growth, and not to focus on the peaks and troughs of the business cycle. Likewise, organic farming does not artificially boost pasture growth for profit” (Biofarm Products Ltd).

“We concentrate on environmentally sound practices to provide friendly environments for people and animals to work and cohabit. The performance or success of Biofarm Products Ltd. is not determined solely by financial success – achieving agreed social, cultural and environmental outcomes are extremely important to us” (Biofarm Products Ltd).

“Biofarm recognise the principles of balance, diversity and interdependence that are important for balancing business, resource use, and environmental sustainability, based on sound cultural, social and economic principles” (Biofarm Products Ltd).

“While the key philosophy of NTS is to add maximum long-term sustainable value for the benefit of its shareholder (TRONT) and stakeholders, NTS realises this must be achieved in a responsible manner, which is where the tribal value of kaitiakitanga comes through” (Ngai Tahu Seafood Ltd).

“We’re looking after the resource for the long term, so we’re not interested in over fishing for short-term benefits, that’s not what we wish to do. These two philosophies work hand in hand. We translate it into respect. It’s respect for what we need to do for our stakeholders. It’s respect for the fish. It’s respect for the environment. It ends up being a respect for the customers and what they require, so that we can maximise that return at the other end” (Gavin Holley 2004, Ngai Tahu Seafood Ltd).

“We take our responsibilities really seriously. We work hard to have the right people environment in which to create a business that is going to be long term sustainable. We spend a

lot of money and a lot of time on that, and a lot of energy. It's not about extracting short-term profits. I think the other comment is from an environmental perspective, it just makes business sense that if we weren't very conscious of environmental factors, that we wouldn't have the business in the long term. I think that long-term view gives it the right sort of balance (Shotover Jet Ltd).

“Kaitiakitanga – respecting the sensitive environments in which they operate – is a fundamental duty of all SJL operations. The jet boat operations seek to minimise noise. The guided treks and walks ensure the effect of humans on the New Zealand landscape is minimal. In addition to participation in the Department of Conservation's programme to breed and release kiwis into the wild, SJL pays concession fees to the Department of Conservation. In 2001 SJL contributed more than \$300,000 in concession fees that are used for community projects” (Shotover Jet Ltd).

“Being privately owned by an individual, the company has to focus on the bottom line. Unlike other businesses, including iwi-owned companies that have multiple income streams, Team Logistics New Zealand earns money when it moves freight. To remain in business it has to be successful in attracting customers and meeting their needs competently and at a competitive cost” (Team Logistics Ltd).

“For example, Team Logistics New Zealand emphasises the need to build and sustain trusting long-term relationships with its customers” (Team Logistics Ltd).

“WWK adopts a sustainable approach – with both a cultural and spiritual meaning – based on Māori Ngai Tahu values” (Whale Watch® Kaikoura Ltd).

“Strategic planning is one of the strengths of WWK” (Whale Watch® Kaikoura Ltd).

“A managed approach to tourism development still needs to be taken, so that interests in the town are considered” (Whale Watch® Kaikoura Ltd).

“We have 3 key principles:  
Everything must be culturally acceptable  
Economically viable, and  
Environmentally sensitive – it cannot deny future generations” (Whale Watch® Kaikoura Ltd).

“The core purpose of WWK is to be a successful business and use that success to empower both shareholders and stakeholders” (Whale Watch® Kaikoura Ltd).

“We (Ngai Tahu) have lived with the whale of the Kaikoura for a thousand years, and we want to live with them for another millennium” (Whale Watch® Kaikoura Ltd).

“Since arriving in the area about 850 AD Ngai Tahu has developed a sustainable relationship with all ecosystems and natural resources, including the sea. Ngai Tahu has co-existed with tohora, the sperm whale, for about 1000 years and we intend to live with them for another 1000 years. It is this concept and philosophy of sustainable management that has been fundamental to our activities. There must be enough to sustain life in its spiritual and physical sense” (Whale Watch® Kaikoura Ltd).

“WWK works within a philosophy of sustainable management and sensible use of natural resources (e.g., preserving the natural environment). In this philosophy, human life is an integral part of a larger dimension where all living things have their rightful place – based on Māori values such as whakapapa” (Whale Watch® Kaikoura Ltd).

### **Authenticating values**

Have businesses adapted traditional western business models or created new models based on Māori principles?

Translating values into actions?

“We have many processes in place to authenticate Māori values and philosophies. We work within a tikanga framework, guided by cultural protocols, but on the cultural side while nothing is formalised or documented it is expected by the whānau, the shareholders” (Tohu Wines Ltd).

“We usually measure company performance using common fiscal factors, and are interested in using other forms of measurement such as triple bottom line reporting. We are also interested in using methods that measure our social and environmental performance” (Tohu Wines Ltd).

“Māori values, principles, philosophies, underpin our business and are translated into actions in many ways, through many examples. Your culture is your worldview, and subsequently becomes the company’s worldview, through our governance, our products, sector businesses, our marketing, our day-to-day business” (Wakatu Inc.).

“A Māori business should have a strong set of cultural standards derived through a business plan” (Wakatu Inc.).

“We are committed to working for iwi/hapū/whānau – they are our shareholders – it is the reason the business exists. This is what drives our business, the whānau/shareholders are at the top, next down is the board of directors, then the CEO, and then the staff”. “Behaviour and actions reflect the mana of the organisation” (Wakatu Inc.).

“We are achieving these goals through programmes in education, scholarships, training, sponsorships, and strategies to help increase employment through our successful sector businesses” (Wakatu Inc.).

“Internal checks are in place and cultural standards are followed” (Wakatu Inc.).

“Biofarm regularly undertake peer reviews, that, although informal provide a means of checks and balances and a way to ensure they are upholding the values that underpin their business. They regard cultural standards as an integral part of the business plan” (Biofarm Products Ltd).

“With the cooperation of local experienced fishermen, many of whom are Ngai Tahu, voluntary industry codes that are designed to protect and lessen the impact of commercial fishing on the environment are practiced. These measures are designed to ensure that NTS manages the quota appropriately” (Ngai Tahu Seafood Ltd).

“Quality is the key principle on which NTS’s operations are built. NTS sets standards and protocols to ensure the product is of the highest quality” “These standards and protocols are reviewed regularly so new technology and research that can improve quality are introduced quickly into the production process” (Ngai Tahu Seafood Ltd).

“These new practices are also passed onto local fishermen through such initiatives as the use of the newsletter “Network”. All these practices are helping to ensure those NTS products delivered to the customer are of the highest quality” (Ngai Tahu Seafood Ltd).

“At an operational level it means that NTS is focused not just on profits but also on long-term goals” (Ngai Tahu Seafood Ltd).



“SJL is a commercial, corporate-driven organisation with sensitivity to environmental, social, and ethnicity issues, but we don’t really act any different to any other corporate owned thing” (Shotover Jet Ltd).

“Implementing safety standards that meet or exceed industry standards are vital to SJL” (Shotover Jet Ltd).

“Kaitiakitanga – respecting the sensitive environments in which they operate – is a fundamental duty of all SJL operations. The jet boat operations seek to minimise noise. The guided treks and walks ensure the effect of humans on the New Zealand landscape is minimal” (Shotover Jet Ltd).

“Valuing customers means SJL needs to be cognisant of the safety standards their operations must meet. SJL has many protocols in place for safety and reviews and introduces new technology that will help customer safety. This is seen as a fundamental principle in all SJL operations” (Shotover Jet Ltd).

“In addition to these company initiatives, SJL also needs to comply with all legislative requirements, be they health and safety or environmental” (Shotover Jet Ltd).

“The benefits of owning SJL to Ngai Tahu have been: “financial”, “with the SJL asset base increasing”, “a sense of pride derived from owning a tourist icon that is recognised nationally and internationally as providing a quality product” (Shotover Jet Ltd).

“The role of the freight forwarder is such that, when agreeing to move freight, they assume compliance responsibilities for cross-boundary issues, biosecurity, hazard management, food safety, etc., plus the increased security demands in the post-September 11 global environment” (Team Logistics Ltd).

“When you are talking about a Māori Brand, it will end up being a fabulous thing if everyone feeding the brand is doing a highly equal job. But the reality is, with an indigenous brand right across the country, how are you going to get all the people to do a quality job” (Team Logistics Ltd).

“The Company is looking at opportunities that will enable Team Logistics New Zealand to grow while at the same time benefiting other Māori businesses by:

- Providing cost-effective and quality freight forwarding services
- Enhancing the capacity of Māori
- Investigating joint ventures with Māori throughout New Zealand (Business Development News 2000). There are big opportunities. It’s bigger than just what it would be for my business (Greg Whitau).
- Providing possible education and employment opportunities in logistics for Māori” (Team Logistics Ltd).

“In many ways, Māori Hapū values are at the core of our business and the way we do things. For example, it is of greatest importance to manaakitanga (value) our visitors, while exercising kaitiakitanga (responsibility) for Aotearoa” (Whale Watch® Kaikoura Ltd).

“It is different because our business is not based solely on materialistic outcomes. Spirituality is the glue that pulls us together, which makes Māori special and it is something that mainstream businesses could take on. Relationships between people, family, and marae – that connection is powerful and has a spiritual element recognising the balance between the physical (tinana), spiritual (wairua), mental (hinegaro) and family (whānau) dimensions. These relationships are

fundamental for our wellbeing, and are all based on intrinsic values and responsibilities. We have a social as well as a financial responsibility. This is much broader than a normal company – it is shown in the way you treat your staff, create an environment where people can grow and succeed and empower themselves, though principles such as whānaungatanga and manaakitanga; this process is very important. If people/staff move onto better things you know you have done your job, they have grown and are expressing their tino rangatiratanga. This is something to celebrate and it becomes theirs as well as our success” (Whale Watch® Kaikoura Ltd).

“Success enables WWK to reflect its values, and this is empowering” (Whale Watch® Kaikoura Ltd).

“Authenticity will be the catch-word. Our greatest cultural component is the Ngai Tahu staff – our people” (Whale Watch® Kaikoura Ltd).

What measures of corporate success have been adopted by Māori businesses incorporating traditional principles?

“Tohu Wines now grows, produces, and markets world-class wines. 80% of our wines are exported. We produce a high-quality product of world standard, and we market to top quality restaurants and to international markets. Tohu Wines won a Trade New Zealand export award in 2003, and the 2002 Sauvignon Blanc received a four-star rating from a leading UK wine magazine, *Decanter*” (Tohu Wines Ltd).

“The Tohu brand and assets are valued in excess of \$30 million, and land prices are increasingly valued in the millions” (Tohu Wines Ltd).

“We work towards a quality regime attached to anything Māori. A Māori business should have a robust set of cultural standards, possibly delivered through a company business plan. We aim to be a successful Māori business, so it’s a big circle to achieve a certain level of success and set our own cultural standards to achieve this. This is entrenched in our business plan, our vision and mission statement. (Tohu Wines Ltd).

“After substantial growth in the last 10 years the asset base is now between \$140 and 150 million with annual profits around \$4.5 million. About 90% of Wakatu’s products are exported to international markets” (Wakatu Inc.).

“Our values have to be meaningful, which validates our cultural identity in our business. “Holding onto land is very important to Wakatu, growing the estate, holding onto and looking after culturally significant land. Ownership, control, and retention of land are very important” (Wakatu Inc.).

“We are achieving these goals through programmes in education, scholarships, training, sponsorships, and strategies to help increase employment through our successful sector businesses” (Wakatu Inc.).

“We are the biggest ratepayer in the region and one of the largest employers. A large amount of the financial returns and profit go back into the region. Mentoring other businesses, supporting the development of Māori businesses, developing entrepreneurial leadership, are all important to us”. (Wakatu Inc.).

“Strict controls are in place to protect our intellectual property, and cultural and traditional knowledge, e.g., our Wakatu land plan, which shows all the land owned by Wakatu and

identifies cultural significant sites that should be protected in perpetuity” (Wakatu Inc.).

“Their reverence for papatuanuku (land and soil) and their treatment of papatuanuku as a taonga (treasure) underpins their business” (Biofarm Products Ltd).

“At the end of August 2003 Biofarm had an annual turnover of \$2.5 million. The farm is valued at \$5 million. Other assets include the trademark, cows, factory plant and equipment with a combined estimate of \$0.5 million” (Biofarm Products Ltd).

“Biofarm contracts 13 distributors throughout New Zealand to distribute their products into supermarkets, health food and service stores” (Biofarm Products Ltd).

“The Factory employs 5 full time/part-time workers” (Biofarm Products Ltd).

“The performance or success of their company is not determined solely by financial success, achieving agreed social, cultural and environmental outcomes are extremely important” (Biofarm Products Ltd).

“NTS is a one of New Zealand’s largest fishing and seafood companies with an annual turnover of approximately \$90 million” (Ngai Tahu Seafood Ltd).

“From small beginnings approximately 13 years ago, NTS now manages Ngai Tahu’s seafood interests, which includes abalone, shellfish, lobster and finfish” (Ngai Tahu Seafood Ltd).

“The allocation of fisheries assets to Māori may see NTS grow by approximately 40% in terms of asset value” (Ngai Tahu Seafood Ltd).

“Being a tribal-owned business means there are differences in the way NTS operates and is expected to operate” (Ngai Tahu Seafood Ltd).

“Having a stakeholder that wants to be a 100-year business fundamentally changes the way a company operates” (Ngai Tahu Seafood Ltd).

“At an operational level it means that NTS is focused not just on profits but also on long-term goals. We report back solely, 100%, to our shareholder (TRONT) and Ngai Tahu stakeholders” (Ngai Tahu Seafood Ltd).

“While the key philosophy of NTS is to add maximum long-term sustainable value for the benefit of its shareholder (TRONT) and stakeholders, NTS realises this must be achieved in a responsible manner, which is where the tribal value of kaitiakitanga comes through: “looking after the resource for the long term”, “so we’re not interested in over fishing for short-term benefits, that’s not what we wish to do”. “These two philosophies work hand in hand. We translate it into respect. It’s respect for what we need to do for our stakeholders. It’s respect for the fish. It’s respect for the environment. It ends up being a respect for the customers and what they require, so that we can maximise that return at the other end” (Gavin Holley 2004, Ngai Tahu Seafood Ltd).

Shotover Jet Ltd remains one of New Zealand’s most recognised tourism operators” (Shotover Jet Ltd).

“SJL consists of tourist attractions operating throughout New Zealand and in the Pacific; more specifically: Huka Jet, Rainbow Springs, and Kiwi Encounter in the North Island; Shotover Jet, Hollyford Valley Walks (purchased in 2003), Dart River Safaris, Franz Joseph Glacier Guiding

(a 50% shareholding) and Aqua Taxis in the South Island; Jet Fiji operating in the Pacific” (Shotover Jet Ltd).

“Central Otago, especially Queenstown, is well known as an international tourist destination, and SJL has been a major contributor to this” (Shotover Jet Ltd).

“Delisting from the Stock Exchange represents a significant change for SJL. It is Ngai Tahu Tourism’s “flagship”, along with Ngai Tahu Tourisms minority shareholding in Whale Watch. While SJL staff identified the benefits associated with being owned by Ngai Tahu they also confirm that changes are expected” (Shotover Jet Ltd).

“The challenge for Ngai Tahu Tourism and SJL is to be integrated fully into the Ngai Tahu Holding Group and Te Rūnanga o Ngai Tahu group structure without losing the characteristics that have seen the company develop icon status within the New Zealand tourism industry” (Shotover Jet Ltd).

“Team Logistics New Zealand is a privately owned company that employs 22 staff Turnover in 2001 was \$9.2 million” (Team Logistics Ltd).

“The only Māori owned freight forwarder operating in New Zealand” (Team Logistics Ltd).

“Although many companies use the services of freight forwarder, some interesting points need to be noted”, “Freight forwarding is a highly competitive environment as evidenced by 45 companies operating in Christchurch City alone” (Team Logistics Ltd).

“The completion of their new purpose-built facility at Christchurch Airport in 2002 was a significant step for Team Logistics New Zealand. Comprising 10 000 square feet of warehouse space and 5000 square feet of office space Team Logistics New Zealand now has the ability to hold consignments without the fear of weather damage. This gives the Company the ability to compete with large multi-national freight companies” (Team Logistics Ltd).

“After 8 years Team Logistics is a competitive force in the freight industry” (Team Logistics Ltd).

“The Company is 7 years into its 10-year strategy, and to date has achieved what it set out to achieve” (Team Logistics Ltd).

“For example, future strategies being considered include the following”, “Increasing the number of Māori businesses that utilise the services of Team Logistics New Zealand” (Team Logistics Ltd).

“Enhancing “logistics capacity” within Māoridom through joint ventures and scholarships” (Team Logistics Ltd).

“Our paramount responsibility is to maintain financial viability, which is no different from maintaining the good health of the Hapū or iwi. We have a responsibility to maintain financial viability so we are able to give our staff security – then they can contribute positively to the customer experience. This is whānaugatanga where it counts and surely the ultimate expression of manaakitanga” (Whale Watch® Kaikoura Ltd).

“When difficult decisions arise we go back to our values – without fail these provide clarity and a way forward. When you boil down to the core principles and values there is a universal commonality. How we express these provides the points of differentiation. True incorporation

of these values is only gained when that expression of principles is a normal part of daily business” (Whale Watch® Kaikoura Ltd).

“Because of our strategic thinking, the company has not delivered great financial dividends in the short term. Strategies are long-term” (Whale Watch® Kaikoura Ltd).

“Profits have been used to take young people off welfare payments and give them skills for the future” (Whale Watch® Kaikoura Ltd).

“The business of whakapapa is interpreting information and statistics based on clear logic underpinned by core values. Financial information is part of the whakapapa of the company. Marketing, imaging and branding are all integral strands to the whakapapa of Whale Watch Kaikoura Ltd. The company has a life force or mauri, it’s powerful, dynamic, providing opportunities and something profound such as unlimited commercial value. These attributes are the formulation and reflection of the staff within the company and the whakapapa that binds us” (Whale Watch® Kaikoura Ltd).

“At the moment we see no need for triple-bottom-line reporting. We don’t need to. If you have to write a report on a good deed – is it a good deed?, where is the mana (prestige, humility) in this if we tell everyone” (Whale Watch® Kaikoura Ltd).

“The true health of WWK is measured in terms of its positioning to take advantage of future opportunities, financial position, the quality of its people, and the quality of its analysis and decision-making” (Whale Watch® Kaikoura Ltd).

### **Processes and standards**

What processes and standards do you have in place?

How do these measures compare to western standards of corporate social and environmental performance?

“We work towards a quality regime attached to anything Māori” (Tohu Wines Ltd).

“This is entrenched in our business plan, our vision and mission statement” (Tohu Wines Ltd).

“We have many processes in place to authenticate Māori values and philosophies. We work within a tikanga framework, guided by cultural protocols, but on the cultural side while nothing is formalised or documented it is expected by the whānau, the shareholders” “We have to be a successful company and operate within both environmental and cultural guidelines” (Tohu Wines Ltd).

“Yes, we follow standards and respond to the high expectations from our shareholders, who keep us honest. They support our professional standards and we provide them with much of the business performance information through hui” (Tohu Wines Ltd).

“We also follow an integrated wine standard – viticulturalist – checklist of environmental standards. Our management fits with the IWP programme. There are things we can do and things we can’t, e.g., the use of sprays in our vineyards is controlled by strict standards” (Tohu Wines Ltd).

“We set very high standards, and these responsibilities are taken very seriously” (Wakatu Inc.).

“To have the right processes and standards in place is strategically important at the governance level” (Wakatu Inc.).

“We have many processes in place to make sure our values (tikanga) are followed and are authentic, including consultation, we talk to everyone who has an opinion, and planning filters down to all groups. A Māori business should have a strong set of cultural standards derived through a business plan” (Wakatu Inc.).

“We have to operate at a very high standard; we have to be transparent and successful. There is probably more pressure on this company and the staff to perform than a normal company” (Wakatu Inc.).

“We have a responsibility to achieve social, environmental, and cultural goals and sustainable development. We will be exploring and developing systems to measure, monitor and report our performance in these areas” (Wakatu Inc.).

“In future we are interested in adding a cultural component to our company reporting: to report on social, cultural and environmental achievements, such as using triple bottom line reporting or as part of an environmental management system” (Wakatu Inc.).

“In relation to compliance monitoring, business activities and performance need to be monitored continually. Internal checks are in place and cultural standards are followed” (Wakatu Inc.).

“We also have to comply with a large amount of legislation. Constant checks are carried out to make sure our internal standards and performance from a cultural side, such as kaitiakitanga, and adherence to sacred sites (wahi tapu), are followed and whānau, shareholders, tangata whenua, are involved in the process on a regular basis” (Wakatu Inc.).

“The Māori community, iwi, Hapū, would definitely support these statements and the portrayal of values and authenticity. The organisation cannot develop in isolation and the community/shareholders guide the incorporation” (Wakatu Inc.).

“Biofarm regularly undertake peer reviews, that, although informal provide a means of checks and balances and a way to ensure they are upholding the values that underpin their business. They regard cultural standards as an integral part of the business plan” (Biofarm Products Ltd).

“Our business operates within these natural environmental processes and cycles. On the western side, western business structures are used for adhering to legislation, standards, and compliance requirements, for example, the Hazard Analysis and Critical Control Point (HACCP) system, to ensure food-safety” (Biofarm Products Ltd).

“Quality is the key principle on which NTS’s operations are built. NTS sets standards and protocols to ensure the product is of the highest quality. These standards and protocols are reviewed regularly so new technology and research that can improve quality are introduced quickly into the production process. These new practices are also passed onto local fishermen through such initiatives as the use of the newsletter “Network”. All these practices are helping to ensure those NTS products delivered to the customer are of the highest quality” (Ngai Tahu Seafood Ltd).

“Standards are a key to NTS development”, “Quality of product”, “essential to success”, “The development of high-quality products are seen as a key to NTS becoming a major player in the international seafood market” (Ngai Tahu Seafood Ltd).

“NTS believes in the traditional practice of sustainable fishing to ensure resources will be there for future generations. With the cooperation of local experienced fishermen, many of whom are

Ngai Tahu, voluntary industry codes that are designed to protect and lessen the impact of commercial fishing on the environment are practiced. These measures are designed to ensure that NTS manages the quota appropriately” (Ngai Tahu Seafood Ltd).

“The company has reviewed several different accreditation systems, such as ISO, but full accreditation to achieve certification was considered expensive and time consuming and we were unsure of the benefits at the time. NTS is interested in using a pragmatic environmental management system” (Ngai Tahu Seafood Ltd).

“NTS has environmental accreditation, specifically Environmark Bronze level” (Ngai Tahu Seafood Ltd).

“Two of the SJL businesses were going through an environmental certification process at the time of the interview. Several of the businesses had previously been ISO accredited, but the company decided to abandon that form of accreditation because some of the rules and regulations were not practical for SJL businesses. However, the company still follows the ISO processes but does not seek accreditation” (Shotover Jet Ltd).

“Implementing safety standards that meet or exceed industry standards are vital to SJL. A health and safety programme (based on the Dupont model) was introduced in 2003. Each business unit has its own strategies for improving its health and safety performance” (Shotover Jet Ltd).

“The Company also signalled in its 2003 Annual Report that the introduction of the Reliability Centred Maintenance methodology into jetboating has been successful and is having a positive impact on safety” (Shotover Jet Ltd).

“In addition to these company initiatives, SJL also needs to comply with all legislative requirements, be they health and safety or environmental” (Shotover Jet Ltd).

“Team Logistics New Zealand has especially high standards when it comes to their interaction with their clients”, “their commitment to their customers gives them a strategic advantage over competitors and is the key to their continued growth” (Team Logistics Ltd).

“Being privately owned by an individual, the company has to focus on the bottom line” (Team Logistics Ltd).

“The role of the freight forwarder is such that, when agreeing to move freight, they assume compliance responsibilities for cross-boundary issues, biosecurity, hazard management, food safety, etc., plus the increased security demands in the post-September 11 global environment” (Team Logistics Ltd).

“Reputation will generally open the door for you. Once you get the door open you have to walk the talk and that is what we do...” (Team Logistics Ltd).

“Team Logistics New Zealand was able to develop a tailor-made database system that is a powerful tool in gaining and managing customers” (Team Logistics Ltd).

“Team Logistics New Zealand holds a MAF licence it is permitted to handle certain types of produce. The compliance costs associated with meeting MAF standards costs approximately \$1000 per month”, “holding a MAF licence is another way of achieving a strategic advantage – “There are only three of us at the airport that have the licence”. “It cost \$1000 month to retain it” (Team Logistics Ltd).

“There are also extra security demands, after September 11, for all products destined for the USA”, “Instead of loading containers right up until they were due for shipment, containers need to be packed, with an inventory available and screened by security before being shipped. Increased security demands also mean increased compliance costs that are met by the freight forwarding company” (Team Logistics Ltd).

“We are currently satisfied with WWK internal structures and processes. The company constantly reviews its processes as a standard part of the business culture” (Whale Watch® Kaikoura Ltd).

“We have responsibilities under several Acts, including Maritime Safety and marine environmental protection (under the Maritime Transport Act 1994 administered by Maritime Safety Authority, Maritime New Zealand), Health and Safety (Health and Safety in Employment Act HSE 1992 administered by the Occupational Safety and Health Service, Department of Labour), Conservation Act 1987, Marine Mammals Protection Act 1978, and the Resource Management Act (RMA) 1991 and the Resource Management Amendment (RMAA) Act 2005. We comply with a large amount of legislation. As a private company we comply with all company legislation, audits, and reporting” (Whale Watch® Kaikoura Ltd).

“This is a new industry (Eco-tourism) which is still setting standards and training procedures. WWK has a comprehensive conservation policy” (Whale Watch® Kaikoura Ltd).

“In terms of financial responsibility we have audited accounts which are audited annually under the companies Act 1993. WWK appears under the annual Te Rūnanga O Ngai Tahu reports” (Whale Watch® Kaikoura Ltd).

“Health and safety for our staff and visitors is of paramount importance, and we work hard on standards and performance in this area. We are always thinking of the best ways for our company to be safe and, we encourage staff to do like wise. I see it in the same terms as creating a safe environment for my own family. We take all possible safety steps for staff, which in turn creates a safe environment for our visitors, and this is our responsibility as hosts” (Whale Watch® Kaikoura Ltd).

“We are audited from Accident Compensation Corporation (ACC) – a high levy/premium expense. The outcome of those audits has allowed us to receive discounts based on our record in safety planning and mitigating potential hazards and accidents” (Whale Watch® Kaikoura Ltd).

“The Maritime Safety Authority (MSA) monitors the operation of whale watch vessels and audits all our records and books. We adhere to the MSA and “Safe Ship” standards” (Whale Watch® Kaikoura Ltd).

“In terms of resource consents we have to comply with and work within the RMA 1991 –, and within the district plan as set by the Kaikoura district council” (Whale Watch® Kaikoura Ltd).

“All permits for commercial whale watching and other interaction with marine mammals are issued by DOC” (Whale Watch® Kaikoura Ltd).

“WWK has committed research funds to gaining a better understanding of whales and the impact on them of tourist activities” (Whale Watch® Kaikoura Ltd).

“We develop policy and protocols with DOC, and we work in accord with the Marine Mammals Act” (Whale Watch® Kaikoura Ltd).



“WWK plays a big part in the community. In August 2002 the whole Kaikoura township (using the brand “Kaikoura close to nature...”) became a Green Globe benchmark community <http://www.kaikoura.co.nz/main/GreenGlobe/>, and voted to move towards Green Globe 21 certification <http://www.greenglobe.org/> in 2003 through best sustainable business practice. Kaikoura is the first community in New Zealand to do this” (Whale Watch® Kaikoura Ltd).

“WWK received an international Green Globe 21 award (with distinction) in March 1997. This award recognises outstanding progress towards the implementation of environmental programmes that demonstrate excellence (Whale Watch® Kaikoura Ltd).

“We have a distinct set of (cultural) standards and in particular through our vision to be the destination, experience, and company of choice. Our mission is to identify, deliver and promote “WOW” experiences and also achieve our cultural, social, environmental, and economic goals and objectives, through values such as rangatiratanga” (Whale Watch® Kaikoura Ltd).

### **Barriers/advantages**

Any problems or conflicts when balancing a western style business philosophy with a cultural one? Where western models are adapted, what shortfalls, tensions, conflicts arose and how were these addressed?

What have been the successes and failures?

“I don’t see incorporating Māori values and principles into business as a barrier or limitation for our business” (Tohu Wines Ltd).

“We need to balance it; cultural values and rules such as tikanga tells us – and tikanga can be regarded as a code of conduct. You certainly get told by Māori shareholders if you do it the wrong way! Tikanga of Te Tau Ihu iwi is our guiding philosophy” (Tohu Wines Ltd).

“A Māori business can achieve competitive advantage based on the unique cultural dimensions of governance and performance” (Tohu Wines Ltd).

“However, if we had had a greater asset base and just gone the western way, we might have been more profitable” (Tohu Wines Ltd).

“Sometimes we have some hard options to make. There are some natural resources and land that we haven’t developed, as a result of family (whānau) advice; and we have managed land and resources in some areas based on guidance from shareholders and whānau that have costed more to develop. But we have to think about the cultural/social factors as well. By focusing solely on profits and not listening to whānau we could have made more money but would have made decisions against tikanga/cultural protocols. We have to think about tikanga and family values as a Māori business” (Tohu Wines Ltd).

“There are no real tensions or conflicts between using a western business model and those based on Māori or indigenous approaches to business”. “However, many other factors need to be considered and weighed before problems or conflicts arise, e.g., cultural concerns, such as customary access and rights, are important” (Tohu Wines Ltd).

“Cultural and ethical standards always have to be considered, e.g., some areas of land are so culturally significant they cannot be sold or developed in the same way and shareholders would often refuse to sell. We need to separate land that is culturally significant (for shareholders) from land that is not, so we can focus on land for economic development. Most developments need to go through the sub-tribe (Hapū) and the shareholders before a plan is approved/endorsed. In many culturally significant areas we use a cautious approach to

earthworks, housing or building development, subdivision, and construction, especially where there is evidence of archaeological sites, artefacts, and cultural values” (Tohu Wines Ltd).

“We do not regard Māori values and principles in business as barriers or limitations” “If anything they strengthen our business” (Wakatu Inc.).

“Māori businesses can achieve competitive advantage based on unique cultural dimensions of governance and performance” (Wakatu Inc.).

“We don’t see any conflict between using a western business model along with Māori or indigenous approaches to business. We believe we have succeeded in integrating the western business model with cultural practices and Māori values” (Wakatu Inc.).

“There will always be some difficulties in balancing business decisions with cultural considerations”, “Occasionally there are some tensions and conflicts surrounding some issues, but nothing that can’t be reconciled, e.g., when making decisions to develop land or using natural resources, strategic plans, based on cultural values, are used to guide our decision-making”, “Shareholders ultimately determine what we can develop and what we cannot, and also how we should manage land, water, natural resources” (Wakatu Inc.).

Wakatu cares greatly about the region it is in, Te Tau Ihu (northern South Island), and about the benefits the company can bring to all people living in the region and in New Zealand”. “We have a vested interest in the community” (Wakatu Inc.).

“We do not experience any tensions or conflicts between using a western business model with a more Māori or indigenous approach to business as they believe the key to survival is improvisation – whakakotahitanga” (Biofarm Products Ltd).

“Biofarm do not regard incorporating Māori values and principles into their business as a barrier, rather they see it as an asset” (Biofarm Products Ltd).

“Biofarm believe that in some niche markets Māori business can achieve a competitive advantage based on unique cultural dimensions of governance and performance” (Biofarm Products Ltd).

“Although being a Māori business owned by an iwi authority distinguishes the company from others, “That hasn’t held us back from adding value”, “I think it means that it may take more time to act and maybe long term it has some degree of impact on operations” (Gavin Holley 2004, Ngai Tahu Seafood Ltd).

“Being a tribal-owned business means there are differences in the way NTS operates and is expected to operate”, “These differences influence the strategic direction, planning and growth of the company” (Ngai Tahu Seafood Ltd).

“Ngai Tahu has a responsibility to provide for the future generations of the iwi”, “this clearly has implications for NTS, whose potential growth relies to some extent on the assumption iwi will remain in the seafood business, which will become long lived”, “to this end Ngai Tahu Holding Corporation undertook research to determine what makes a business successful in the long term – specifically how a business lives to be a 100 years old or more”, “having a stakeholder that wants to be a 100-year business fundamentally changes the way a company operates”, “for example, this long-term horizon distinguishes NTS from: a family-owned company that could be sold off in a generation or two; or a company listed on the share market where there could be a take-over tomorrow” (Ngai Tahu Seafood Ltd).

“We report back solely, 100% to our shareholder TRONT and Ngai Tahu stakeholders” (Ngai Tahu Seafood Ltd).

“The planning process within TRONT group is well considered and is the primary vehicle for validating the direction and activities of NTS” (Ngai Tahu Seafood Ltd).

“Although extra time and effort is needed to ensure NTS takes adequate account of tribal values and practices, the effort NTS puts into its relationship with its shareholder and stakeholders is reflected in the support of the business and its initiatives for the growth of the company” (Ngai Tahu Seafood Ltd).

“Certainly there’s much more passion out there for the seafood industry, and that’s good. But also the seafood industry, arguably, is going through some significant changes economically, and the danger now is that there’s some disparity between the way the business probably has to operate and the way it has in the past” (Ngai Tahu Seafood Ltd).

“Further, at this point I think the culture of these businesses is not the Ngai Tahu culture right now.... SJL is a commercial, corporate-driven organisation with sensitivity to environmental, social, and ethnicity issues, but we don’t really act any different to any other corporate owned thing” (Shotover Jet Ltd).

“We’ve developed values that we operate from in this business. I’ve never actually mapped them against the Ngai Tahu values but I can’t imagine they’d be too different” (Shotover Jet Ltd).

“SJL operates by a certain set of values at the moment. That will change over time as Ngai Tahu values are absorbed into the organisation. I don’t think that will be better or worse, it will just be different. They’re both good sets of values, and I think it will work for the organisation either way” (Shotover Jet Ltd).

“While SJL staff identified the benefits associated with being owned by Ngai Tahu they also confirm that changes are expected. The challenge for Ngai Tahu Tourism and SJL is to be integrated fully into the Ngai Tahu Holding Group and Te Rūnanga o Ngai Tahu group structure without losing the characteristics that have seen the company develop icon status within the New Zealand tourism industry” (Shotover Jet Ltd).

“Greg does not see any disadvantages to being a Māori business. Rather he sees it as a positive, and in developing the future direction of the Company is looking at opportunities that will enable Team Logistics New Zealand to grow while at the same time benefiting other Māori businesses” (Team Logistics Ltd).

“While many companies, Māori and non-Māori, espouse principles similar to these, it is the way in which they are implemented that truly reflect a Māori kaupapa” (Team Logistics Ltd).

“The principal barrier to Māori entering the freight forwarding industry appears to be capacity. Team Logistics New Zealand repeatedly emphasises the importance of networks and relationships, which only time spent in the industry can build” (Team Logistics Ltd).

“The Company therefore developed and implemented strategies to gain market share and generate profits” (Team Logistics Ltd).

“Team Logistics believes that their commitment to their customers gives them a strategic advantage over competitors and is the key to their continued growth” (Team Logistics Ltd.).

“One of the most significant moments in the development of the company came when we (management) realised there were whales at Kaikoura all year round” (Whale Watch® Kaikoura Ltd).

“A tourist company or business depends on the leisure dollar and there is a huge amount of choice for international visitors. So you need to understand the market-place and mitigate the risks and turn them into opportunities and profit. A key factor in this process is to have the right mind-set, and WWK adopts “a negatives to positives” approach to compliance and regulations. Compliance must be a natural part of business and built into how the company operates. Compliance issues are built into best practice guidelines to inspire best practice” (Whale Watch® Kaikoura Ltd).

“WWK treats barriers as opportunities. By being positive, entrepreneurial, creative and innovative, WWK treats barriers as opportunities (Wally Stone). The company applies quality analysis and smarter planning, which leads to smarter decisions that must be actioned” (Whale Watch® Kaikoura Ltd).

“Most businesses currently focus on governance and management to make them risk averse, and everything is designed to minimise and protect the asset. We (WWK) have had to take lots of risks” (Whale Watch® Kaikoura Ltd).

“Wally Stone believes that a fear of failure is holding back many Māori organisations, but is adamant that “if your motivation to succeed is greater than the fear of failure, you have a greater chance of being successful....if we were afraid of failure we wouldn’t have started....governance appears to be bogged down with measuring performance. This is backward looking – any organisation that wants success must look forward” (Whale Watch® Kaikoura Ltd).

### **Intellectual property issues**

What forms of IP protection have been implemented by Māori businesses in the area of cultural values and heritage?

“Intellectual property (IP) of products and services is a very important consideration for Tohu wines. While the name Tohu is trademarked, the artwork on the labels is not. We are making a stand with our branding in Europe and have trademarked Tohu Wines Europe Ltd for use in European Union countries” (Tohu Wines Ltd).

“The main IP mechanism we have in place is the Tohu trademark. It is a very costly exercise to trademark and protect a brand: in the vicinity of NZ \$15,000 for a period of about 10 years. Patent Attorney costs are tens of thousands of dollars” (Tohu Wines Ltd).

“The main forms of IP protection for cultural heritage and traditional knowledge are through cultural practice (tikanga). We have gone to great lengths to make sure our stories are meaningful and accurate. The Tohu trademark means our cultural stories should be told properly and accurately. Much thinking goes into developing a name that means something, and this is our knowledge. Tohu means a signature, sign and mark. It indicates a direction in which we want to go, and provides connection with our people. From a Te Atiawa and Taranaki iwi perspective there are also connections to the prophet Parihaka: Tohu was a leader in that community” (Tohu Wines Ltd).

“Intellectual property (IP) of products and services is a huge consideration for our business” (Wakatu Inc.).

“Registered names and brands are very important to us, especially with our move into international markets. The brand tells our story and reflects our cultural values – it gives meaning to our indigenous stories and the values behind the brand. So IP is very important. Sometimes the brand reflects the intangible. We have a comprehensive series of steps in place to select a brand, and a legal process is required” (Wakatu Inc.).

“The main IP mechanisms we have in place to protect business knowledge, products, and services are Trademarks, but registration is very expensive, around \$25,000, and has to be protected vigorously. We have to register our brand in every country selected under the food and beverage IP” (Wakatu Inc.).

“Strict controls are in place to protect our intellectual property, and cultural and traditional knowledge, e.g., our Wakatu land plan, which shows all the land owned by Wakatu and identifies cultural significant sites that should be protected in perpetuity”. (Wakatu Inc.).

“Intellectual property has not been an issue for Biofarm in the past, but it may become increasingly important in the future” (Biofarm Products Ltd).

“The Biofarm and Ecofarm trademarks are the only formal intellectual property mechanisms Biofarm use” (Biofarm Products Ltd).

“Knowledge such as cultural heritage and Mātauranga (Māori knowledge), is not in written form, and only accessible in oral form from the owners” (Biofarm Products Ltd).

“NTS sees trademarks, brands and labels as important to their business and their future development. Further, when NTS puts time and effort into developing them, it sees the need to protect them, which it has done” (Ngai Tahu Seafood Ltd).

“If NTS develops a new label or a new brand, it protects it in the right classes in the markets in which it ultimately intends to operate. However, it is always cognisant of the costs of renewing trademarks” (Ngai Tahu Seafood Ltd).

“NTS are interested in patents to protect an innovative idea or product, or knowledge, and there is a possibility of using patents for commercial use in future.

“NTS has the ability to patent and protect a commercial product” (Ngai Tahu Seafood Ltd).

“Everything the company does, especially if research is involved, has a level of intellectual property about it” (Ngai Tahu Seafood Ltd).

“We wouldn’t typically patent unless it is worth something to this business” (Ngai Tahu Seafood Ltd).

“With respect to intellectual property, SJL sees their brands as valuable intellectual capital (Shotover Jet Ltd).

“The company applies a rigorous process of protection around patent, copyright and brands” (Shotover Jet Ltd).

“It’s not R & D in a scientific research development sort of sense, because we’re not that sort of business. Our R & D is much more around understanding how our customers receive our product...accepting feedback and modifying our product, behaviour or whatever... Looking for new business opportunities becomes quite a creative process but it’s not really R & D. We

have protection in place, and we renew it when it comes time to renew it, and we watch our competitors closely to make sure they're not trading off our brands" (Shotover Jet Ltd.).

"The main IP mechanism to protect our business knowledge, products and services are trademarks" (Whale Watch® Kaikoura Ltd).

"Intellectual property (IP) of products and services is an important consideration and the Whale Watch logo is a registered trademark®. Our names are an important part of our business and we use resources to keep our identity our own" (Whale Watch® Kaikoura Ltd).

"I believe the debate on intellectual property needs to be defined and put in place at the marae level. The marae gives permission for the use of whakapapa on behalf of the tangata whenua and Hapū who own the intellectual property and the cultural knowledge as it pertains to each family" (Whale Watch® Kaikoura Ltd).

"IP can take many forms, such as issuing a rahui (regulation) on the marine or coastal environment to sustain or protect resources, taonga" (Whale Watch® Kaikoura Ltd).

A large number of intellectual property rights issues were identified in the objective and are summarised in Appendix 5.

## 8. Summary Results

---

Results to date show that many Māori businesses retain a strong sense of cultural identity and pride. All the business interviewed showed a high level of commitment to excellence and quality in their operations, relationships, and activities. Māori values although not well defined are still central to most Māori organisations, are used to differentiate a Māori organisation from the rest, and play a central role in helping to distinguish and develop governance, identity, culture, organisation, operations, responsibility, accountability, functioning and marketing (Te Puni Kōkiri 2003). In many cases, the differences between a Māori and non-Māori business were subtle. However, on closer examination underlying details show a difference, even if it is based on the origins or reasons for the business existing or operating, or through business goals that contribute to Māori development or and advancement. All the Māori businesses interviewed are relatively young – most were formed in the mid to late 1990s.

Branding is about developing a point of difference especially for New Zealand exports, and indigenous culture may play an important role in forming this difference. The key findings in this research show that Māori companies are interested in forming a point of difference based on culture, but the central focus for all Māori companies is: attaining excellence; accountability to shareholders, quality and profitability; producing high quality products and services; being competitive; and commitment to building a strong relationship with a client or customer base and growing that base. A second tier responsibility and performance measure was sustainably managing the environment – natural resources, and achieving sustainable development.

### **What constitutes a Māori business?**

All the businesses/companies interviewed identified at being Māori, and were proud of their Māori identity, culture, and ancestry attached to, or at the heart of their business. The way Māori businesses defined themselves varied, but all the businesses wanted to contribute to Māori development and advancement and felt they had a responsibility in this area. The main criteria for defining a Māori business included:

- Māori shareholding, Māori owned
- Partnerships, joint ventures with other Māori businesses
- An organisational culture that reflects Māori values, giving the business a cultural identity in its operations and responsibilities, such as following tikanga or set of cultural rules and protocols, having Māori staff especially in management
- Through business practice, management, process, marketing, branding, recognising Māori values and concepts in some way
- To be successful as a Māori company/business for Māoridom, regional economies, and Aotearoa-New Zealand
- Achieving excellence as a Māori business/company

### **How would you describe your business model?**

Most businesses thought they had either a modern composite (mixed: western-cultural) or a mainly western business model, but at the core of each model was the maintenance of economic viability. However, most felt they deviated from the purely western-based model in some areas, particularly relating to governance-shareholding, the origins of the business (multiple-owned land, Treaty claims, iwi/hapū shareholders or beneficiaries), responsibility, organisational structure, product or service development, social and environmental responsibility, and marketing and branding. Most of the businesses needed to engage and interact effectively with constituents, commonly iwi/hapū and whānau, the general public, customers and consumers, and form alliances with non-Māori organisations such as the Crown and sector-based industry.

For many Māori businesses the cultural side acts as an important conscience for their operations and functions: even though it is not formalised or defined, it is always there in the background and manifests itself in many different forms. All the businesses interviewed were focused on achieving excellence and quality, especially excellent products and service, competitiveness, accountability, financial management, economic viability, profitability, and being successful both in New Zealand and internationally. Most believed success was usually measured by financial achievement and profit making, although success could be measured by other factors, such as contribution to Māori economies, regional economies, the New Zealand economy, local employment, or building Māori capacity, skills, and training. Many successful Māori businesses/companies felt a responsibility as a model and/or mentor to other Māori businesses and to Māoridom in general.

### **Recognising Māori values in business**

All businesses recognised cultural values as important, but in the case studies given, Māori values were not incorporated into the business in any formal, defined or strategic way. When values were identified and described their exact role was uncertain, but it was agreed they could determine overall business culture, ethos, performance, and behaviour in many ways. Business or company values often mirrored or reflected Māori values to some degree, and were translated or implemented through strategies and actions, organisational philosophy, hierarchy, operations, functions and systems, products, and marketing. The prioritisation and implementation of values was often a response based on alignment to stakeholder, shareholder, constituent or consumer values and beliefs, and relationships and networks. Cultural values when identified were reflected in, for example: Organisational structure-governance, company protocols, policies, procedures, standards, and systems, strategic planning, responsibility to shareholders or beneficiaries, inter-relationships between people within the organisation, Māori and general employment, Māori personnel-staff, development of skills, training, and building Māori capacity, relationship with the physical environment and natural resources, responsibilities to protecting and managing cultural heritage, social and environmental responsibility, business ethic and business principles, product development and process, service delivery, and marketing and branding. Many Māori businesses and staff had an ancestral connection (whakapapa) to their shareholders, beneficiaries, or constituency that influenced governance and business philosophy. Cultural values at an organisational level were seen as instruments to visualise, strategise, and achieve Māori aspirations through business models and delivery that contributed to Māori development and advancement. Many of the representatives interviewed believed their businesses were working for Māoridom in some way even if it was simply as a role model/mentor/example for other businesses and for Māori people in general. Most Māori businesses took pride in being successful in the Pakeha (non-Māori) and international world.

### **Marketing and indigenous branding**

All the companies/businesses wanted to position themselves as national and world leaders in their respective areas of business, marketing and branding. For each business it was most important to market or brand a product and or service as excellent quality, with competitive pricing, rather than just based on cultural qualities. However, indigenous branding was seen as an important concept that should be explored and fully used. It was agreed brands take many years to develop and make a major statement about a product, range of products, service, and, more importantly, about the business/company itself. For Māori businesses, brands were seen as important ways of telling a story or narrative about their culture, the history of an area or people, or their beliefs.

None of the companies/businesses believed there should be a distinct national or indigenous Māori brand for everyone. All businesses believed indigenous branding should be carefully controlled and professionally marketed by each business/company. Further, Māori branding requires a comprehensive, tikanga (cultural-custom)-based approach and process that can be controlled by each business. Too many indigenous brands, or a lack of cultural integrity when developing brands, were seen as detrimental to all Māori brands and could cause long-term damage to culturally based



brands. Indigenous branding had the potential to add value to products, services, and business profile, but only on condition it was carried out properly, was equated with excellence, quality and professionalism, and was strongly aligned to the values of consumers, clients, and overseas markets. All businesses agreed there was merit to coordinating the independent development of brands to provide guidelines, models, and standards. Any branding should be a bottom-up approach directed and controlled from Māori businesses themselves.

Most businesses were uncertain about the advantages of indigenous branding, but all were proud to express Māori culture in some way as part of the company or business, either through their: organisational philosophy such as mission statements, goals, and objectives; operations and systems such as business plans, annual reports, environmental management plans, procedures; or through marketing, products and services.

### **Strategic direction and sustainable development**

All the businesses interviewed had a vision, usually up to 25 years, and a strategic plan 5–10 years. Often they had a shorter time-frame marketing strategy of 3–5 years. Many of the businesses had a vision that partly aligned or contributed to tribal – iwi, hapū or whānau – development in their rohe (geographic area) or to Māori aspirations across Aotearoa-New Zealand. Most saw their future markets as international, and a large number of countries were given as part of an exporting strategy. All the businesses believed overseas markets and overseas customers were vital to their growth, development and sustainability. All the businesses interviewed were trying to achieve sustainable development in one-way or another. Sustainability performance was measured and reported but not formally recognised in annual reports or through triple or quadruple bottom line reporting. Most Māori businesses regarded and interpreted sustainability holistically, and recognised the need to consider economic-financial, environmental, social and cultural factors and imperatives. Many of the businesses were trying to implement sustainability strategies, for example through:

- distribution of wealth back to wider communities, shareholders, and regions
- ethics and morals through procedures, standards and protocols and an organisational philosophy of honesty, integrity, responsibility and compliance
- investment back into local and regional economies
- educational scholarships; sustainable management of resources
- resourcing community projects; examples of good practice, care and guardianship of the environment
- maintenance of strict environmental standards
- maintenance of strict health or food production standards
- good practice, care and guardianship of cultural heritage; creating local, regional, and Māori employment
- provision of training, industry training; increasing skills, building capacity for Māori and the general population
- compliance with all forms of New Zealand legislation
- compliance with international conventions, agreements, and legislation.

All the Māori businesses were interested in developing systems to measure, monitor, and report on sustainability performance.

### **Authenticating values**

Many of the businesses provided examples of authenticating cultural values but very little was formalised or documented. For some businesses there were tribal or whānau statements of cultural values that could be mapped across and used in business. Values were often translated and demonstrated through economic, social, environmental or cultural performance, such as programmes and funding to education, scholarships, training, employment, housing, environmental projects, community projects, responses to management and protection of cultural heritage,

sustaining resources, and mentoring and helping other businesses. Some of the businesses believed they had processes and systems in place to authenticate Māori values, but most businesses measured company performance using fiscal factors. Many businesses believed they had cultural standards in place and that cultural performance standards could be expressed through strategic plans, performance indicators, annual reports, and business plans. Most codes of conduct, performance measures, protocols and cultural standards were informal. Māori values were regarded as important and ultimately can become the company or business worldview, represented through governance, products, services, operations, systems, strategies, marketing, day-to-day business procedures and actions. Some voluntary industry codes reflect cultural values and ensure good practice, management, and standards are achieved. All the businesses measured their success in many different ways but often elucidated to cultural values and factors other than just financial when describing or measuring success.

### **Processes and standards**

All the businesses fully comply with large amounts of legislation. Legislative requirements included the Companies Act, Health and Safety Act, environmental legislation such as the Resource Management Act (RMA 1991), tax codes and law through New Zealand Inland Revenue, Equal Employment Opportunities (EEO), Employment Relations Act and employment laws, Biosecurity laws. Robust processes and standards were implemented under these laws. Compliance also had to follow international standards. A number of businesses followed industry and sector standards such as the integrated wine standard – a checklist of environmental standards, safety standards (e.g., reliability centred maintenance methodology, maritime safety, accident prevention, health and safety programmes), MAF licences, Border security standards and regulations, Biosecurity standards, Hazard Analysis and Critical Control Points systems to ensure food safety, fish quota management regimes that were regularly monitored. More informal processes and standards, usually aligned to legislation and sometimes going further than that required under legislation, were met through business plans, protocols, written standards, expected practices and guidelines, voluntary industry codes, industry standards, codes, peer review, checks and balances, responsibilities, expectations, and reports, and included safety codes and reviews, implementing health and occupational safety standards, food safety, environmental management and good practice, duties and principles such as kaitiakitanga, employment relations, good faith bargaining etc. To measure, report and review cultural practices in business, processes and standards were informal and included: business plan statements, protocols, checks, reviews, responses and reaction from shareholders and constituencies. These informal methods were all used to define and implement cultural values. For environmental management systems, two of the businesses interviewed had reviewed ISO accreditation, but selected Environmark (Landcare Research 2004), an environmental accreditation system to help report on environmental performance and as a checklist. All businesses had transparent systems in place, and comprehensive processes and standards were used to review, audit and report (e.g., annual reports, web sites, shareholder reports). Many of the businesses had developed comprehensive databases for compliance, product and marketing development, customer intelligence, and to maintain and enhance standards and quality. All businesses said it was essential to agree on, define, and regularly review processes and standards and these were used to indicate quality and excellence.

### **Barriers/advantages**

None of businesses saw any conflicts, problems, or limitations with balancing or integrating cultural values and western business imperatives and practice. Two of the businesses were unsure what effect cultural values could have on their operations but most believed they could strengthen a business and be an asset. Cultural factors were determined to have an effect on the way a Māori business operates through, for example, governance, strategic planning, decision-making, relationships and interactions with shareholders and customers, marketing and branding, achieving sustainable development, and in managing and protecting resources. They could also provide a competitive advantage if used in the right way and provide the basis for a company culture and

relationships with both Māori groups, clients and consumers. Tikanga or cultural values were often regarded as a code of conduct or a guide to behaviour for individuals or a Māori entity (e.g., a Māori business or organisation) and provide another dimension (rather than a limitation) to a business. For products and services it was something that could provide a point of difference and was unique in the world. Many believed cultural factors were something else that needs to be weighed up when resolving conflict or managing resources.

### **Intellectual property issues**

Intellectual property issues were a major consideration for all the Māori businesses interviewed. IP covered intellectual knowledge, research knowledge, cultural knowledge, brands, products, services, organisational operations and systems, consumer and client databases, export strategies, and company intelligence. Some of the main IP mechanisms to protect brands included trademarks, patents, copyrights, however these were both extremely expensive and required legal process, and ongoing protection. Most businesses had comprehensive steps in place to deal with IP. Brands were regarded as intellectual capital, and required protection in every country where that brand was sold. New brands or labels needed to be protected in the right classes in the markets. For cultural heritage and traditional knowledge mechanisms for protection were informal usually reliant on tikanga (cultural process, protocols, and custom) and cultural guidelines. When a Māori business was involved in land or resource development, the need to protect and manage culturally significant sites in perpetuity was an important consideration and processes were often developed with groups outside of the business to achieve this. In general, strict controls were required to protect intellectual property. IP was an area in which many Māori businesses needed assistance, and all the businesses believed it would become increasingly important in the future.

## 9. Conclusions

---

Key findings are given below:

### **Māori business**

All the businesses interviewed referred to themselves as Māori and were proud to be Māori (for a number of reasons)

### **Business models**

The businesses described themselves as either a western business model or a composite business model – a mixture of western business and indigenous culture

### **Recognising Māori values in business**

All recognised the importance of Māori values, but many businesses had difficulty identifying or articulating the exact role and nature of Māori values in businesses. Many had difficulty mapping across or aligning values from iwi or hapū strategies and planning documents (e.g., a tribal vision or statement) and few could explain how values translated into actions through distinct examples. This research found many examples of Māori values (e.g., kaitiakitanga, manaakitanga, awhinatanga, whānaukatanga, kotahitanga) being exhibited and practised in each business but these were not formally recognised, measured, or reported on. Some of the businesses had cultural protocols in place for management, and specific cultural protocols were taught to staff; cultural values often formed the basis for developing outside relationships, organisational structure, ethics, integrity, standards, performance, and responsibility.

### **Marketing and branding**

All businesses wanted to market their own products and brands, and develop an autonomous marketing and branding strategy under their own control. Businesses such as Wakatu Inc. and Whale Watch® Kaikoura Ltd. were advanced in this area. There was a great deal of interest in indigenous branding but always in conjunction with other types of brands. For many indigenous businesses branding was a way to tell stories, create a distinct cultural identity, express culture and important company concepts and values, portray and illustrate a business or company philosophy, and create an image associated with their business or products. Marketing and branding is therefore developed for five main purposes:

- To reflect the culture and philosophy of the organisation as a whole and the relationship with iwi, hapū, and whānau Māori
- Promote excellence and quality (of products and services), nationally and globally
- To provide a distinct brand to products using cultural values along with other human-global values – such as caring for the environment, guardianship of the environment, clean-green image, importance of families (whānau), past, and future generations, healthy and safe food, ethical businesses, sustainable products, and exemplary service. Branding was used not only to tell something of the product or service but also to portray the company itself
- To form a strong binding relationship with the customer, shareholder or client
- To position a product or service in a specific market place, using a specific marketing strategy or philosophy for that market (e.g., Asia, Europe, USA)

Marketing products and services was always specific to a distinct shareholder, client, consumer, or market destination and seldom generic. Branding and marketing was an area of considerable thought and process by each business.

### **Strategic direction and sustainable development**

All the businesses had developed strategic and business plans, a vision, and annual reports, and all had a clear direction of where they wanted to go. Through comprehensive business plans and effective governance they remained focussed, and each had performance targets in place (often measuring financial, economic, production, and markets or client-base). All had identified countries for export markets and were developing strategies for each of these markets. All businesses were interested in achieving some form of sustainable development, but were not clear of the exact strategies, actions, and performance measures required to achieve this. Cultural, social, environmental measures as well as economic were important to each business.

### **Authenticating values**

Many of the businesses cited Māori values, such as tikanga, manaakitanga and kaitiakitanga, in their everyday operations, management, philosophy, processes, and activities; and while these were not formally recognised, they were often respected by staff. Many of the businesses demonstrated incorporation and authentication of Māori values through examples and these could be reported and authenticated in a more formal structured reporting system. During this research, discussions began on the development of cultural reporting being added to triple bottom line reporting.

### **Processes and standards**

A large number of processes and standards were followed by each business, e.g., financial standards, fish quota management standards, health and safety, animal welfare, environmental standards, ISO accreditation, and Environmark. All the businesses took processes and standards very seriously. There were no standards in place for the incorporation of cultural values; however, cultural protocols were often taken into account through staff management and training; a rigorous cultural branding process was followed by three of the businesses.

### **Barriers advantages**

None of the businesses regarded the incorporation of cultural values into business as a barrier or limitation. Most believed such incorporation could help strengthen the business and improve standards and ethics, and create an ongoing guiding philosophy, cultural values also improved accountability to shareholders, beneficiaries, clients, and customers. Incorporation of cultural values could also improve accountability to and fulfil expectations of iwi, hapū and whānau whilst promoting planning for future generations. Two of the businesses cited difficulties in balancing business decisions with cultural considerations, especially where the business had a strong relationship with Māori shareholders and aligned with iwi/hapū/whānau, but this could be a normal part of business. Cultural factors may influence the governance, operations, conduct, and decision-making of a business, and two businesses stated that cultural consideration could constrain profits in some areas. Most businesses believed they could remain competitive based on cultural values.

### **Intellectual property**

All businesses believed IP was a very important issue they were addressing in various ways, and many also saw it as a potential issue. Brands were seen as valuable intellectual capital taking years to develop. Trademarks were a key mechanism to protect IP, while patents and copyrights had also been considered by many businesses. Registered names and brands were important to protect, along with cultural integrity. All the businesses had robust systems and processes in place to consider IP, and regularly review these. Cultural IP was taken into account more informally through tikanga (custom, protocols) being employed and implemented in business. The IP of knowledge through research and development was another area being considered by many of the businesses.

## **10. Acknowledgements**

---

This work was carried out under objective 3, of the programme “Māori business branding: achieving competitive advantage in global markets (FRST Contract MANA0301), short title “Waka Tohu”, led by Mr Buddy Mikaere of Mana Taiao Ltd. The work was funded by the Foundation for Research, Science and Technology (FRST), Wellington, New Zealand. We wish to thank the seven participating Maori organisations and individual staff for their time given to this research. Gail Tipa, Nadia Kimberley-Ward and Rōpata Taylor are acknowledged for their help with completing case studies and the collation of information for this report.

---

## 11. References

---

- Barlow, C. 1993. *Tikanga Whakaaro: Key concepts in Māori culture*. Auckland, Oxford University Press.
- Business and Economic Research Ltd; Federation of Māori Authorities 1997: *The nature and extent of the Māori economic base* (updated by Te Puni Kōkiri, 1999)
- Cash, M., Taurima, W. 2002: *Tumatanui: The experience of the first indigenous wine company to export high quality wine from New Zealand (A bicultural research project)*. *The Open Polytech of New Zealand Monographs in Māori business: Breaking the boundaries No. 3*. Wellington, New Zealand.
- Conroy, D. Lee, C (pers. comms). University of Auckland Business School, Department of Marketing.
- Durie, M. 2002: *The business ethic and Māori development*. Unpublished paper presented at Maunga Ta Maunga Ora Economic Summit March 2002, Hawera, New Zealand.
- Elkington, J., 1997: *Cannibals with forks: the triple bottom line of 21<sup>st</sup> century business*. Oxford, Capstone Publishing.
- Harmsworth, G.R. 1995: *Māori values for land-use planning: Discussion Document*. Manaaki Whenua-Landcare Research unpublished report. 118 p.
- Harmsworth, G.R. 1997: *Māori values and GIS: The New Zealand experience*. GIS Asia Pacific: The Geographic Technology Publication for the Asia Pacific Region. Pp. 40–43.  
[http://www.landcareresearch.co.nz/research/social/indigenous\\_index.html](http://www.landcareresearch.co.nz/research/social/indigenous_index.html)
- Harmsworth G.R.; Barclay, Kerr, K.; Reedy, T. 2002: *Māori sustainable development in the 21<sup>st</sup> Century: The importance of Māori values, strategic planning and information systems*. *Journal of Māori and Pacific Development, He Puna Korero* 3: 40–69.
- Harmsworth, G.; Warmenhoven T.; Pohatu, P.; Page, M. 2002: *Waiapu Catchment Technical Report: Māori community goals for enhancing ecosystem health*. Foundation for Research, Science, and Technology (FRST) contract TWWX0001. Landcare Research Report LC0102/100 for Te Whare Wananga o Ngati Porou, Ruatorea (unpublished). 185 p.
- Henderson, M.; Thompson, D. 2003: *Values At work: The invisible threads between people, performance, and profit*. Auckland, Harper Collins. 212 p.
- Kawharu, I.H. 1977. *Māori land tenure, studies of a changing institution*. Oxford, UK, Clarendon Press.
- Landcare Research 2004: *Environmark. An environmental accreditation system*.  
[http://www.landcareresearch.co.nz/research/sustain\\_business/enviromark/index.asp](http://www.landcareresearch.co.nz/research/sustain_business/enviromark/index.asp)
- Marsden, M. 1988. *The natural world and natural resources: Māori value systems and perspectives*. *Resource Management Law Reform working paper 29*. Part A. Wellington, Ministry for the Environment.

Mead, H. 2004: *Tikanga Māori: Living by Māori values*. Wellington, Huia Publishers and Te Whare Wananga o Awanuiarangi.

New Zealand Institute of Economic Research Inc. (NZIER) 2003: *Māori economic development – Te Ohanga Whanaketanga Māori*. Wellington, New Zealand Institute of Economic Research. 106 p.

Paine, L.S. 2002: *Value shift: Why companies must merge social and financial imperatives to achieve superior performance*. New York, USA, McGraw-Hill.

Reihana, F. 2004: Taonga tuku iho and commercial activity: What are Māori perspectives on cultural protection? A research report presented in partial fulfilment of the requirements of the degree of Masters of Business Studies. Massey University Albany, Auckland.

Roberts, K. 2003: *Lovemarks: The future beyond brands*. Powerhouse books, New York  
<http://www.lovemarks.com/index.php>

Rokeach, M., 1973: *The Nature of human values*, Free Press, New York.

Statistics New Zealand 1999: *New Zealand now: Māori*. Wellington, Statistics New Zealand.

Statistics New Zealand 2000: Unpublished 1996 Census tables. Wellington, Statistics New Zealand.

Te Puni Kōkiri 2002: *Māori in the New Zealand economy*, 3rd ed. Wellington, Te Puni Kōkiri (Ministry of Māori Development)

Te Puni Kōkiri 2003: *Hei Whakatinana I Te Tūrua Pō – Business Success and Māori organisational Governance Management Study*. Wellington, Te Puni Kōkiri (Ministry of Māori Development) and Federation of Maori Authorities Inc.(FOMA).



---

## 12. Bibliography/Recommended Reading

---

- Allport, G., 1961: *Pattern and growth in personality*. New York, Holt Rinehart and Winston.
- Barker, J. 1992: *Future edge: Discovering the new paradigm of success*. New York, William Morrow and Company Inc.
- Barlow, C. 1993: *Tikanga Whakaaro: Key concepts in Māori culture*. Auckland, Oxford University Press.
- Barrett, R. 1998: *Liberating the Corporate Soul: Building a visionary organisation*. Woburn MA, Butterworth Heinemann.
- Bateson, G. 1972: *Steps to an ecology of mind*. New York, Ballantine Books.
- Blanchard, K.; O'Connor, M. 1997: *Managing by values*. San Francisco, Berrett-Koehler Publishers Inc.
- Brooks, I. 1997: *Second to none: Six strategies for creating superior customer value*. Auckland, Nahanni Publishing Ltd.
- Business and Economic Research Ltd; Federation of Māori Authorities 1997: The nature and extent of the Māori economic base (updated by Te Puni Kōkiri, 1999).
- Cash, M., Taurima, W. 2002: Tumatanui: The experience of the first indigenous wine company to export high quality wine from New Zealand (A bicultural research project). *The Open Polytech of New Zealand Monographs in Māori business: Breaking the boundaries No.3*. Wellington, The Open Polytechnic.
- Chippendale, P.; Colins, C. 1995: *New wisdom II: Values-based development*. Brisbane, Acorn Publications.
- Clutterbuck, D.; Goldsmith, W. 1998: *The winning streak mark 2*. London, Orion Business Books.
- Collins, J. 1996: 'Aligning action and values', *Leader to leader*. USA, Drucker Foundation and Jossey Bass Inc.
- Collins, J.; Porras, J. 1998: *Built to last: Successful habits of visionary companies*. London, Random House.
- Cook, D., McGuire, R.; Vernacchia, R. 1996: *Coaching mental excellence: It does matter whether you win or lose*. Palo Alto, California, Warde Publishers.
- Cooper, R.; Sawaf, A. 1997: *Executive EQ: Emotional intelligence in business*. London, Orion Business Books.
- Covey, S., 1990: *The seven habits of highly effective people*. New York, Simon and Schuster.
- Csikszentmihalyi, M. 1997: *Finding flow: The psychology of engagement with everyday life*. New York, HarperCollins.

- Csikszentmihalyi, M. 1992: *Flow: the psychology of happiness*. London, Rider.
- Dilts, R. 1996: *Visionary leadership skills: Creating a world to which people want to belong*. Capitola, California, USA Meta Publication.
- Elkington, J. 1997: *Cannibals with forks: The triple bottom line of 21<sup>st</sup> century business*. Oxford, Capstone Publishing.
- Endenburg, G. 1998: *Sociocracy as social design*. Rotterdam, E Buron.
- Fritz, R. 1989: *The path of least resistance for managers: Learning to become the creative force in your life*. New York, Ballantine Inc.
- Fritz, R. 1999: *The path of least resistance for managers: Designing organisations to succeed*. San Francisco, Berret-Koehler Publishers Inc.
- Garratt, B. 2000: *The learning organisation: Developing democracy at work*. London, HarperCollins.
- Glasser, W. 1984: *Control theory: A new explanation of how we control our lives*. New York, Harper & Row.
- Hampden-Turner, C.; Trompenaars, A. 1993: *The seven cultures of capitalism*. New York, Doubleday.
- Harker, P.; Scott, T. 2002: *The myth of the nine to five: Work, workplaces and the workplace relationships*. Bayswater, Victoria, Australia, Shannon Books.
- Harmsworth, G.R. 1997: Māori values and GIS: The New Zealand experience. *GIS Asia Pacific: The Geographic Technology Publication for the Asia Pacific Region*. (April 1997). Pp. 40–43. [http://www.landcareresearch.co.nz/research/social/indigenous\\_index.html](http://www.landcareresearch.co.nz/research/social/indigenous_index.html)
- Harmsworth, G.R. 1995: Māori values for land-use planning: Discussion document. Manaaki Whenua-Landcare Research unpublished report. 118p.
- Harmsworth G.R.; Barclay, Kerr, K.; Reedy, T. 2002: Māori sustainable development in the 21<sup>st</sup> Century: The importance of Māori values, strategic planning and information systems. *Journal of Māori and Pacific Development, He Puna Korero* 1 3(2): 40–69.
- Harmsworth, G.; Warmenhoven T.; Pohatu, P.; Page, M. 2002: Waiapu Catchment technical report: Māori community goals for enhancing ecosystem health. Foundation for Research, Science, and Technology (FRST) contract TWWX0001. Landcare Research report LC0102/100 for Te Whare Wananga o Ngati Porou, Ruatorea (unpublished). 185 p.
- Henderson, M.; Thompson, D. 2003: *Values At work: The invisible threads between people, performance, and profit*. Auckland, Harper Collins. 212 p.
- Henderson, M. 2003: *Finding true north: Discover your values, enrich your life*. Auckland, HarperCollins.
- Hilliard, A. 1950: *The forms of value: The extension of a hedonistic axiology*. New York, Columbia University Press.

- Holdsworth, L. 2000: *A new generation of business leaders*. Christchurch, Holdsworth Press.
- Holland, G. 1998: *A call for connection: Solutions for creating a whole new culture*. Novato, California USA, New World Library.
- Japp, T. 1986: *Enabling leadership: Achieving results with people*. London, HRA Publications.
- Jones, R. 2000: *The big idea*. London, HarperCollins.
- Kelly, A.; Sewell, S. 1988: *With head, heart and hands: Dimensions of community building*. Bowen Hills, Boolarong Publications.
- Kluckhohn, C. 1951: *Values and value orientation in the theory of action*. Cambridge MASS, Greenwood Press.
- Koch, R. 1998: *The 80/20 principle: The secret of achieving more with less*. London, Nicholas Brealey Limited.
- Konorski, J. 1967: *Integrative activity of the brain*. Chicago, Chicago Press.
- Kotter, J.; Heskett, J. 1992: *Corporate culture and performance*. Boston, Free Press.
- Landsberg, M. 1996: *The tao of coaching: Boost your effectiveness at work by inspiring and developing those around you*. London, HarperCollins.
- Marsden, M. 1988: The natural world and natural resources: Māori value systems and perspectives. *Resource Management Law Reform working paper 29. Part A*. Wellington, Ministry for the Environment.
- Mead, H. 2004: *Tikanga Māori: Living by Māori values*. Wellington, Huia Publishers and Te Whare Wananga o Awanuiarangi.
- Maslon, A. 1971: *Farther reaches of human nature*. New York, Viking Press.
- Miller, W. 1999: *Flash of brilliance: Inspiring creativity where you work*. New York, Perseus Books.
- Mitroff, I.; Denton, E. 1999: *A spiritual audit of corporate America: A hard look at spirituality, religion, and values in the workplace*. San Francisco, Jossey-Bass Inc.
- Molden, D. 1996: *Managing with the power of NLP: Neuro-linguistic programming for competitive advantage*. London, Financial Times Prentice Hall.
- Najder, Z. 1975: *Values and evaluation*. Oxford, Oxford University Press.
- New Zealand Institute of Economic Research Inc. (NZIER) 2003: Māori Economic Development – Te Ohanga Whanaketanga Māori. Wellington, New Zealand Institute of Economic Research. 106 p.
- O'Reilly, C.; Pfeffer, J. 2000: *Hidden value: How great companies achieve extraordinary results with ordinary people*. Boston, Harvard Business School Press.

- Paine, L.S. 2002: *Value shift: Why companies must merge social and financial imperatives to achieve superior performance*. USA, McGraw-Hill.
- Palmer, H.1994: *Resurfacing*. USA, Stars Edge International.
- Persig, R. 1992: *Lila: An inquiry into morals*. London, Corgi.
- Peters, T.; Waterman, R. 1982: *In Search of excellence: Lessons from America's best-run companies*. New York, Harper and Row.
- Posner, B.; Schmidt, W. 1992: Values congruence and difference between the interplay of personal and organisational values systems, *Journal of Business Ethics*. Vol.12, 2: 171–177.
- Ray, P.; Anderson, S. 2001: *The cultural creatives: How 50 million people are changing the world*. New York, Three Rivers Press.
- Roddick, A.2000: *Business as unusual: The triumph of Anita Roddick*. London, HarperCollins.
- Rokeach, M.1973: *The nature of human values*. New York, Free Press.
- Scott, T.; Harker, P.1998: *Humanity at work*. Brisbane, Australia. Phil Harker & Associates Pty Ltd.
- Secretan, L.1997: *Reclaiming higher ground: Creating organisations that inspire the soul*. New York, McGraw-Hill.
- Secretan, L.1998: *The way of the tiger: Gentle wisdom for turbulent times*. Alton, Ontario, Canada. The Thaler Corporation Inc.
- Senge, P.1992: *The fifth discipline*. Sydney, Random House.
- Statistics New Zealand 1999: *New Zealand now: Māori*. Wellington, author.
- Statistics New Zealand 2000: Unpublished 1996 Census tables. Wellington, author.
- Te Puni Kōkiri 2002: *Māori in the New Zealand economy*. 3rd ed. Wellington, author.
- Thomson, K.2000: *Emotional capital: Capturing hearts and minds to create lasting business success*. Oxford, Capstone Publishing.
- Tosey, P.; Smith, P.1999: Assessing the learning organisation: Part 2 – exploring practical assessment processes. *The Learning Organisation: An International Journal* 6(3): 107–115.
- Wheatley, M.2001: *Leadership and the new science: Learning about organisation from an orderly universe*. San Francisco, Berrett-Koehler.
- Whitmore, J.1996: *Coaching for performance*. London, Nicholas Brealey.
- Wilk Braksick, L.2000: *Unlock behaviour, Unleash profits: How your leadership behaviour can unlock profitability in your organisation*. New York, McGraw Hill.
- Wright, K.1998: *Breaking the rules: Removing the obstacles to effortless high performance*. Boise, CPM Publishing.

---

## 13. Appendices

---

**Appendix 1.** The international values inventory (AVI) for organisations and businesses.

Key values used in business – The values inventory (AVI) for organisations and businesses developed by the Minessence Group – an international network of qualified consultants (Henderson & Thompson 2003) gives 125 AVI values definitions.

### **Accountability/Ethics**

To hold yourself and others accountable to a code of ethics derived from your values. To address the appropriateness of your behaviour in relation to your values.

### **Achievement**

To accomplish something noteworthy and admirable in your work, education, or your life in general.

### **Adaptability/Flexibility**

To adjust yourself readily to changing conditions and to remain flexible during ongoing processes.

### **Administration/Control**

To be in command. To exercise specific administrative functions and tasks in a business or institution, such as finance or recruitment.

### **Affection**

To express fondness or devotion through physical touch.

### **Art/Beauty**

To experience intense mental pleasure through observing that which is aesthetically appealing in either natural or human creations.

### **Assertion/Directedness**

To put yourself forward boldly regarding a personal line of thought or action.

### **Being liked**

To experience friendly feelings from your peers.

### **Being self**

The desire to know the truth about yourself and the world around you. This includes seeking an objective awareness of your personal strengths and limitations. The desire to be yourself in all situations

### **Care/Nurture**

To be physically and emotionally supported by family and friends throughout your life, and to value the same from others.

### **Collaboration/Subsidiarity**

Interdependent co-operation with all levels of management, ensuring full and appropriate delegation of responsibility takes place.

### **Communication/Information**

The effective and efficient flow of ideas and factual information to persons in all or part of an

organisation.

**Community/Personalist**

To have sufficient depth and quality of commitment to a group, its members and its purpose, so that independent creativity and interdependent cooperation will be maximised simultaneously.

**Community/Supportive**

The desire to have, or to create, a group of peers for the purpose of ongoing mutual support and the creative enhancement of each other.

**Competence/Confidence**

To experience the realistic and objective confidence that you have the skills to achieve in the world of work and to feel that your skills are making a positive contribution.

**Competition**

To be energised by a sense of rivalry, to be first or most respected in a given arena, e.g., sports, education or work.

**Congruence**

To experience and express your feelings and thoughts in such a way that what you communicate externally to others is the same as what you experience internally.

**Construction/New Order**

To initiate and to develop a new form of institution or organisation for the purpose of creatively enhancing society.

**Contemplation/Asceticism**

The self-discipline and art of meditative reflection that prepares you for intimacy with others and that gives you a sense of being part of something bigger than yourself.

**Control/Order/Discipline**

To control people and/or things according to prescribed rules so as to maintain the accepted level of discipline and order.

**Convivial technology**

The application of technology for the benefit of both humanity and the planet.

**Co-operation/Complementarity**

To work cooperatively in a group so that the unique skills and qualities of one individual supplement, support and enhance the skills and qualities of the others in the group.

**Corporation/New order**

The innovative design of new organisational or institutional forms which, if implemented, would creatively enhance society.

**Courtesy/Hospitality**

To treat others, and be treated by them, in a polite, respectful, friendly and generous manner.

**Creativity/Ideation**

Original thought and expression that converts, for the first time, new ideas, images or concepts into practical and concrete forms.

**Criteria/Rationality**

To think logically and reasonably using a formal framework for analysis. To exercise reason before emotion.

**Decision/Initiation**

To take personal responsibility for beginning a creative course of action. To act on your conscience without external prompting.

**Design/Pattern/Order**

To have an awareness of the natural arrangement of things. To use this awareness to create new arrangements through the application of the arts, ideas or technology, e.g., architecture.

**Detachment/Solitude**

Regular discipline of non-attachment to external things that leads to the potential to live more fully.

**Detachment/Transcendence**

Spiritual discipline and detachment so as to experience a global and visionary perspective through a feeling of being in touch with some ultimate source of wisdom.

**Dexterity/Co-ordination**

Sufficient harmonious interaction of your mental and physical functions to perform basic instrumental tasks, e.g., following a knitting pattern to knit a jersey.

**Discernment/Communal**

To make consensus decisions, relative to long-term planning for a group or organisation, through prayerful reflection and honest interaction.

**Duty/Obligation**

To closely follow established customs and regulations out of dedication to your peers and sense of responsibility to institutional codes.

**Economics/Profit**

To accumulate physical wealth in order to be secure and respected.

**Economics/Success**

To attain favourable and prosperous financial results in business through effective control and efficient management of resources.

**Ecority/Aesthetics**

The personal, organisational or conceptual influence to enable persons to take authority for the created order of the world and to enhance its beauty and balance through creative technology in ways that have worldwide influence.

**Education /Certification**

To value completing a formally prescribed course of learning and to receive a certificate of accomplishment.

**Education/Knowledge/Insight**

To experience ongoing learning as a means of gaining new facts, truths and principles, motivated by the reward of a new understanding gained through insight. To enjoy the 'A ha' experience of learning.

**Efficiency/Planning**

To plan processes and activities which, when implemented, will make the best possible use of available resources.

**Empathy**

The ability of being able to see things from other people's points of view.

**Endurance/Patience**

To bear difficult and painful experiences, situations or persons with calm, stability and perseverance.

**Equality/Liberation**

To experience yourself as having the same value and rights as all other human beings in such a way that you are set free to be yourself and to free others to be themselves.

**Equilibrium**

To maintain a peaceful social environment by averting upsets and avoiding conflicts.

**Equity/Rights**

To have an awareness of the moral and ethical claim of all persons (including yourself) to legal, social and economic equality and fairness plus a personal commitment to advocate this claim.

**Evaluation/Self-system**

To appreciate an objective appraisal of yourself. To be open to what others reflect back to you as being necessary for self-awareness and personal growth.

**Expressiveness/Freedom/Joy**

To share your feelings and fantasies so openly and spontaneously that others feel free to do the same.

**Faith/Risk/Vision**

To commit to a cause, or to champion a way of life, even if it may mean putting your lifestyle at risk.

**Family Belonging**

To devote yourself to, or be concerned about, your family. To belong to and be accepted by your family. To have a place to call home.

**Fantasy/Play**

To experience your personal worth through unrestrained imagination and personal amusement.

**Food/Warmth/Shelter**

To have adequate physical nourishment, warmth and comfort and a place of refuge from the elements. To be protected from the natural elements.

**Friendship/Belonging**

To have friends to share things with on a day-to-day basis.

**Functional/Physical**

To be able to perform minimal manipulations of your body to care for yourself. To be concerned about the body's internal systems and their ability to function adequately.



**Generosity/Service**

The desire to share your unique gifts and skills with others as a way of serving humanity without expecting anything in return.

**Growth/Expansion**

To creatively enable an organisation to develop and expand.

**Health/Healing/Harmony**

To have a soundness of mind and body that flows from meeting your emotional and physical needs through self-awareness and disciplined preventative measures.

**Hierarchy/Propriety/Order**

To have a methodical, harmonious arrangement of persons and things, ranked above one another, in conformity with established standards of what is good and proper within an organisation.

**Honour**

To have high respect for the worth, merit or rank of those in authority, e.g. parents, superiors or national leaders.

**Human dignity**

The basic right of every human being to have respect and to have their basic needs met in a way that will allow them the opportunity to develop their potential.

**Human rights/World Order**

To create the means for every person in the world to experience his/her basic right to life-giving resources such as food, shelter, employment, health and a minimal practical education.

**Independence**

To think and act for yourself in matters of opinion, conduct etc., without being subject to external constraint or authority.

**Integration/Wholeness**

To organise your personality (mind and body) into a coordinated, harmonious totality.

**Interdependence**

To value personal and inter-institutional cooperation above individual decision-making.

**Intimacy**

To be able to share yourself fully – thoughts, feelings, fantasies and realities – mutually and freely with another on regular basis.

**Intimacy/Solitude as unitive**

To experience the personal harmony that results from a combination of meditative practice, mutual openness and total acceptance of another. The experience leads to new levels of meaning and awareness of truth.

**Justice/Global distribution**

To elicit inter-institutional and governmental collaboration to help provide the basic life necessities for the poor in the world.

**Justice/Social order**

To see every human being as being of equal value and to place a priority on taking a course of action that addresses, confronts and helps correct conditions of human oppression.

**Knowledge/Discovery/Insight**

To be motivated by the experience of moments of insight in a quest for truth through patterned investigation.

**Law/Guide**

To see authoritative principles and regulations as a means for creating your own criteria and moral conscience, and questioning those rules until they are clear meaningful to you.

**Law/Rule**

To live by the rules. To govern your conduct, action and procedures by the established legal system.

**Leisure/Freesence**

To use your time in a way that requires as much skill and concentration as your work, yet totally detaches you from work so that your spontaneous self is free to emerge in playful and contagious manner.

**Life/Self-actualisation**

To experience and express the totality of your being through spiritual, psychological, physical; and mental exercises with the goal of developing your full potential.

**Limitation/Acceptance**

To give positive acceptance to the fact that people have weaknesses and limitations. To see their limitations as a necessary consequence of their strengths.

**Limitation/Celebration**

To recognise that your limitations are part of the framework for exercising your talents. To have the ability to laugh at your own imperfections.

**Loyalty/Fidelity**

To see as important the strict observance of promises and duties to those in authority and to those in close personal relationships.

**Macroeconomics/World order**

To manage and direct the use of financial resources at an institutional and inter-institutional level. The goal being the creation of a more stable and equitable world economic order.

**Management**

To control and direct personnel in a business or institution for the purpose of optimal productivity and efficiency.

**Membership/Institution**

To take pride in belonging to and functioning as an integral part of an organisation, foundation, establishment, etc.

**Minessence**

To miniaturise and simplify complex ideas or technology into concrete and practical applications for the purpose of creatively impacting on the world-view of the user.

**Mission/Objectives**

To establish organisational goals and execute long term planning that takes into consideration the needs of society and how the organisation contributes to those needs.

**Mutual responsibility/Accountability**

To maintain a reciprocal balance of tasks and assignments with others so that everyone is answerable for their own area of responsibility.

**Obedience/Duty**

Dutiful and submissive compliance with moral and legal obligations established by parents, civic or religious authorities.

**Obedience/Mutual accountability**

To be mutually and equally responsible for establishing and complying to a common set of rules and guidelines in a group.

**Ownership**

Personal and legal possession of skills, decisions and property that gives you a sense of personal authority.

**Patriotism/Esteem**

To honour your country through personal devotion, love and support.

**Personal authority/Honesty**

To be in the position of being able to honestly express your full range of feelings and thoughts in a straightforward, objective manner. To command authority in your area of expertise.

**Physical delight**

To delight in the joy of experiencing the stimulation of all the senses of your body, e.g., having a massage, sunbathing, enjoying a spa.

**Pioneerism/Innovation**

To introduce and originate creative ideas for positive change in organisations and other social systems. To provide the framework for implementing them.

**Play/Recreation**

To engage in an undirected, spontaneous pastime or diversion from the anxiety of daily life. To 'recharge your batteries' through playful activities.

**Presence/Dwelling**

To be there for another person in such a way that, through your own self-knowledge and inner wisdom, they are able to perceive themselves with increased clarity.

**Prestige/Image**

To have a physical appearance which reflects your success and achievements, gains the esteem of others and promotes success.

**Productivity**

To feel energised by generating and completing tasks and activities. To be keen to achieve the goals set for you by others and to live up to their expectations.

**Property/Control**

To accumulate property, and exercise personal control over it, for your security and to meet your basic physical and emotional needs.

**Prophet/Vision**

To perceive, with clarity, global issues of social justice, human rights, ecology, etc. To communicate your vision in relation to these issues, with such clarity, that your listeners are empowered by it to take action.

**Relaxation**

A diversion from physical or mental work that reduces stress and provides a balance of work and play as a means of realising your potential.

**Research/Originality/Knowledge**

The systematic investigation and contemplation of the nature of truths and principals that lie behind our experience of reality. The aim is to create new insights and awareness – to see things as no one has before.

**Responsibility**

To be personally accountable for, and in charge of, a specific area or course of action in your group or organisation.

**Rights/Respect**

To respect the rights and property of others as you expect them to respect you and yours.

**Ritual communication**

To use liturgy and the arts as a communication medium for raising people's critical awareness of social issues.

**Rule/Accountability**

To have each person openly explain or justify their behaviour in relation to established codes of conduct, procedures, standards, etc.

**Safety/Survival**

To avoid personal injury, danger, or loss, and to do what is necessary to protect yourself in adverse circumstances.

**Search/Meaning/Hope**

The inner longing and curiosity to integrate your feelings, imagination and knowledge in order to discover your unique place in the world. To search for 'your place in the scheme of things'.

**Security**

To have a safe place or relationship where you experience protection and freedom from cares and anxieties. A place you find comforting to have.

**Self-interest/Control**

To restrain your feelings and control your personal interests for the purpose of physical survival in this world.

**Self-preservation**

To do whatever is necessary to protect yourself from physical harm or destruction in what you perceive as an alien/threatening world. To look after 'number one' in the face of threat.

**Self-worth**

The knowledge that when those you respect and esteem really know you, they will affirm you are worthy of their respect.

**Sensory pleasure/Sexuality**

To gratify your sensual desires and fully express your sexuality

**Service/Vocation**

To use your unique gifts, skills and abilities to contribute to society through your occupation, business, profession or calling.

**Sharing/Listening/Trust**

To actively and accurately hear and sense another's thoughts and feelings. To express your own thoughts and feelings in a climate of mutual trust and confidence in each other's integrity.

**Simplicity/Play**

To have a deep appreciation of the world combined with a playful attitude toward organisations and systems that people find energising and positive. To see simplicity in complexity and to be detached from the material world.

**Social affirmation**

Personal respect and validation, arising from the support and respect of your peers, which is necessary for your growth and success.

**Support/Peer**

To be sustained in both joyful and difficult times, by persons similar to yourself.

**Synergy**

The harmonious and energising relationship of persons in a group that results in the group far surpassing its predicted ability (based on the summation of the abilities of its individual members).

**Technology/Science**

Systematic knowledge of the physical or natural world and practical applications of the knowledge through the construction of devices and tools.

**Territory/Security**

To make provision for physically defending your property, state or nation.

**Tradition**

To ritualise family history, religious history, or national history in your life so as to enrich its meaning. To pass on traditional ways through ritual and ceremony.

**Transcendence/Global equality**

To transcend physical needs with the intention of influencing issues of equality, e.g., a hunger strike to change the conditions for the inmates in a prison.

**Truth/Wisdom/Integrated insight**

The intense pursuit and discovery of ultimate truth above all other activities. To seek the wisdom that stems from understanding a set of universal principles that govern all things.

**Unity/Diversity**

To value groups, organisations, society and the ecosystem, that have a diversity of membership. To value biodiversity.

**Unity/Uniformity**

To create harmony and agreement in an institution to the end of achieving efficiency, order, loyalty, and conformity to established norms.

**Wonder/Awe/Fate**

To be filled with marvel, amazement and awe when faced with the overwhelming grandeur and power of your physical environment. To feel that, at times, things are out of your hands, and that fate rules.

**Wonder/Curiosity/Nature**

To experience the physical world with marvel and wonder. To seek to learn about and explore it personally.

**Word**

The desire to communicate universal truths so effectively that the listeners become conscious of their strengths and limitations and life and hope are renewed for the individual.

**Work/Labour**

To have the skills and rights enabling you to produce an adequate living for yourself and your family.

**Workmanship/Craft/Art**

To create products or works of art to enhance the world and our life in it.

**Worship/Faith/Creed**

Reverence for and belief in God that is expressed and experienced through a commitment to religious doctrines and teachings.

## **Appendix 2.** Key Māori values and definitions

### *A Māori values inventory (AMVI)*

#### **Tikanga**

The framework or body of rules and values used to govern or shape peoples behaviour, or a code of expected behaviour, and is analogous to all Māori values and culture. It can be the organisational structure around all values or the values themselves. Often refers to the correct way of doing things, including custom, protocols, process, rules, etiquette, formality, codes, condition, ethic, morals, and method.

#### **Kawa**

Those rules and protocols defined and used by different organisations. Kawa places expectations on others to behave in a certain way inside that organisations domain, or within a constituency, and to be aware and to abide by a distinct set of rules and values.

#### **Whakapapa**

Genealogical descent, heredity, lineage. Whakapapa is the ordered relationship, structured lineage, and dependency from the universe, through atua (gods), to land, air, water, and people. Traditional Māori believed that there were a large number (~70) of divine forces or atua (i.e. gods, deities) with supernatural powers. Whakapapa is something that connects people to each other and to the environment, and influences the way Māori behave in business, the tikanga that is used, the way they relate to constituencies, and manage resources and territories. Eight major atua were the offspring of Papatuanuku (the earth mother, or in her physical form, land) and Rangi-nui-e-tu-nei (the sky father). They were: Tane Mahuta – atua of the forests and all living things within them, and father of man, Māori descend from Papatuanuku and Ranginui through Tane Mahuta; Tangaroa – atua of the fish in the sea and all sea life; Tumatauenga – atua of war and guardian of the marae area; Tawhirimatea – atua of the winds and storms, the weather; Rongomatane – atua of peace, agriculture, all cultivated foods including the kumara; Haumiatiketike – atua of uncultivated foods, all wild foods including the fern root; Ruaumoko – atua of earthquakes and volcanoes; Whiro – atua of darkness, disease, pestilence. Other important gods originating from the main gods included Tutewehiwehi – the grandson of Tangaroa and the atua of amphibians and the inland water creatures. Recognition of Atua was achieved through the practice of karakia, kawa, and tikanga. Māori also believed in a host of minor atua, taniwha and other supernatural beings.

#### **Iwitanga**

An expression and celebration of those qualities and characteristics that make an iwi or Hapū unique and underpins a shared whakapapa, history and identity. Iwitanga can be defined as the expression and celebration of those qualities and characteristics that make that iwi or Hapū unique and underpin shared whakapapa, history and identity. This significant value, as a basis for tribal development, probably embraces all other values an iwi or Hapū may have. It provides every person of a particular iwi or Hapū descent the opportunity to actively participate in the development of his/her own whānau and or/Hapū; it draws on the collective strength of an iwi or Hapū while celebrating unique Hapū identities; it contributes to the enhancement and strengthening of whānau and Hapū links; it achieves Hapū independence whilst recognising the value of inter-dependence of the iwi as a whole; and it recognises that people are a significant asset and the need to maximise the transferable knowledge and skills that an iwi or Hapū possesses. Iwi...tanga is significant in providing guiding principles for tribal development.

#### **Tino Rangatiratanga, Rangatiratanga, Mana Motuhake**

Acts of authority and power. Traditionally, Rangatiratanga was pivotal in tribal development and resource management. Rangatiratanga determined who had the authority to make resource management decisions. Kaitiakitanga then placed an obligation on Rangatira to manage resources wisely. The meanings often ascribed to Rangatiratanga include chieftainship, authority and prestige.

Traditionally, Rangatiratanga generally resided with the chief or Rangatira. However, Rangatiratanga also applied to the collective. It was as much a statement about collective rights to participate in decision making, as it was an assertion of the right of the Rangatira to make decisions on behalf of the iwi and/or Hapū.

Tino rangatiratanga is an expression of chiefly authority, inherent sovereignty, and legitimacy based on mana and tikanga, including the right to permit or deny others. It can also be used as a basis for self-determination at the iwi, Hapū, whānau, or individual level. Many people also equate tino rangatiratanga as having systems and processes in place to give control to planning an individual's, or an organisation's, destiny.

### **Mana**

Honour or prestige, or internal commitment and guiding values to do the right thing. Mana is earned respect (that often comes from giving) and can constitute lifelong work to be elevated in status above others. Mana is given to an individual or organisation by other groups as an expression of recognition of status. Mana can only be elevated by this recognition from others.

### **Mana Whenua, Mana Moana**

Mana Moana legitimacy to control, manage, and administer land, water and marine resources. Mana is legitimacy to act in an authoritative and responsible manner, it also confers responsibilities on individuals and organisations. Mana whenua is the legitimacy to control, manage and administer the land and its resources. Associated with tino rangatiratanga, mana whenua status gives tribal authority over affairs within a particular area or land district. Mana moana extends this tribal authority over the coastal and marine environment and gives legitimacy to control, manage, and administer resources at sea and along the coast, within a defined rohe or geographic location.

### **Manaakitanga**

Reciprocal and unqualified acts of giving, looking after, caring, hospitality.

### **Arohatanga, Aroha**

Care, love, respect, charity, sympathy. The notion of and having regard for care, respect, love, including compassion. A person or organisation with aroha expresses and demonstrates genuine concern towards another group or acts in beneficial way towards them, or with their welfare in mind, no matter what their state of health or wealth. It is an all-encompassing quality, expressed by love for people and the natural world, and all living things. In terms of resource use, aroha can mean "wise" rather than "intelligent" use of resources, based on the motive of care and concern. Within traditional Māori values there are three essential elements to all things: te puu or positive force; te kee or negative force; and te haa or life giving force energy or force. The puu is the male element, the kee is the female element, and the haa is the life-giving power of the gods or spiritual element. Aroha, as with many other Māori values, is a combination of these forces and qualities.

### **Awhinatanga**

Assist, help, care for, give assistance and help to others.

### **Whānaungatanga**

Bonds of kinship that exist within and between whānau, hapū, and iwi. Whānaungatanga is the relationship that binds people together through their common genealogy, unity of purpose and mutual support. It can be defined as family cohesion. Whānau, hapū and iwi are held together by their kinship responsibilities or whānaungatanga. Literally, whānaungatanga is made up of three words: *whānau*, *nga* and *tanga*. *Whānau* is a group of people who are linked by blood ties, adoption, fostering or invitation. *Nga* indicates that the group is, or is likely to be, extended. *Tanga*, in this case, indicates that it is an action and a process that must be understood.



In its simplest form, whānaungatanga can be described as a host of obligatory actions such as sharing, and providing support as well as a sense of belonging both physically and spiritually. Always central to these actions, however, is tikanga Māori.

### **Whānaungatanga and the role of the whānau**

Whānau is the basic unit of Māori social structure, and can be defined as an extended family comprising of children, parents, grandparents, cousins, uncles, aunts, grand uncles, grand aunts, all once, twice, or thrice removed. Traditionally, whānau was the food-producing and residential unit; whānau occupied certain areas/locations of designated land (Kawharu 1977). In principle, every individual had right to an equal share in the resources of their tribal land. For example, individuals often had occupation or access rights to certain resources such as useful plants, trees, fishing, water, and land areas. In practice, however, the individual rarely, if ever, stood apart from the extended family. As part of a larger community, whānau would carry out roles and responsibilities that were often prescribed. Decisions in these groups were generally made by family heads (Kawharu 1977).

Today, whānau members may live separately yet share a mutual existence. Whānau members are concerned with matters that impact on their whānau social, political, spiritual, economic, educational, and cultural wellbeing or customary land interest. Whānau spokespeople often speak on behalf of their whānau.

### **Kotahitanga, Whakakotahitanga**

Respect for individual differences and the desire to reach consensus, principle of unity and alliance. Kotahitanga, whakakotahitanga is about solidarity, union, unity, and gives respect for individual differences and the desire to reach consensus. Kotahitanga can mean inclusion, such as bringing groups of people together such as parts of a community, hapū, iwi, or business, to include their views and ideas in any forum, discussion, planning environment, decision-making process. It may also involve trying to develop some form of unity amongst a community, group of shareholders, or constituency.

### **Turangawaewae**

Having a place of standing, belonging, and security. Usually giving people a sense of belonging and identity knowing they can stand confidently and place their feet firmly in a place of belonging. Turangawaewae gives a person the right to stand on a particular piece of land, or in a certain place, and be able to speak and be heard on matters affecting them and their relationship to that land and its resources. It particularly applies at the hapū, whānau, and marae level, but also may be a strong relationship to other significant places and geographic localities established through links to whakapapa.

### **Kaitiakitanga**

Guardianship or custodianship of the environment. Kaitiakitanga is the practice of spiritual and physical guardianship based on tikanga. The root word is “tiaki” which includes aspects of guardianship, custodial responsibilities, stewardship, care, and wise management. Kaitiakitanga is an “active” rather than “passive” guardianship or custodianship. It conferred obligations rather than a right to make decisions, and placed obligations to make wise decisions about resource management, and to sustain the wellbeing of iwi, hapū, and whānau. All had the collective responsibility to ensure that resources were managed wisely. However, the role of kaitiaki in the decision-making process was often given to tohunga who, in conjunction with rangatira from various whānau groups and tribal rūnanga, who would prescribe tapu and ritenga. Kaitiakitanga is inextricably linked to tino rangatiratanga.

The principles and practices created that meet the goal of mauri maintenance is called tikanga. These principles were created on recognition of the four planes of reality: te taha tinana, te taha

hinengaro, te taha wairua, and te taha whānaungatanga.

### **Wairua, Wairuatanga**

The spiritual dimension to life, a belief and value that all things have a spirit as well as a physical body. Wairua is about expressing the spiritual dimension within tikanga. Spiritual and physical bodies are held together by a *mauri* – a life force or life energy. Closely linked to whakapapa and life and death. The role of spiritual factors that form part of a guiding philosophy to shape behaviour, can define value priorities and preferences. Its level of importance will vary from person to person, business to business. Wairuatanga often manifests itself, or its degree of influence, through tikanga, cultural integrity, Mātauranga Māori, and cultural sensitivity.

### **Koha, Whakakoha**

Act of giving, offering, whakakoha, koha, reverence, treasure, present. Whakakoha is the act of being respectful and giving.

### **Whakapono**

Act of believing or having faith and trust in others, a system or organisation.

### **Kaha, Whakakaha**

A type of strength, to strengthen, or to be strong. Gaining strength in yourself or from others. Deriving strength from inter-relationships with others, working hard in all aspects of life, and working to the best of your ability. Work hard – play hard. Kia kaha means be strong, work hard, or to derive strength from your work.

### **Kōkiri, Kaikōkiri, Manutioriori**

Advance, in a warrior-like way or in a competitive way. Proceed in a diligent, thoughtful, constructive way. To show qualities of leadership and can also mean enterprise. Has relevance for the way Māori proceed or advance in development, enterprise, and business.

### **Utu, tauutuutu**

The act of giving, or giving back something in return for something received. The act of reciprocity is called *utu* and is a significant value recognising the importance of giving to others, giving and receiving, and achieving and maintaining balance in society, balance in all actions and relationships, achieving balance for ecosystems.

### **Wehi**

Fear, awe, respect (Barlow 1992). Wehi is the effect or power that one person, an experience, or an organisation has to influence another. This is relative power or influence. Awe, to stand in awe or be held in awe, to hold something in high respect, reverence. Also has origins and meaning as fear, panic, or terror.

### **Ihi**

Vitality, quality of excellence, or unique quality (Barlow 1992). Ihi refers to the vitality or total personality of a person or object and includes ones physical, spiritual, and psychological attributes. Something of excellent quality has a great amount of ihi, something inferior has little ihi. Ihi can increase through skills and talents, or improvements to services and products.

### **Ahuwhenua**

Industriousness, providing food and sustenance for the family. Through work, a person gains the respect and admiration of family, colleagues, and the larger community. Even though a person may work for a living, they must also devote time and effort to the care of their home and family. This is the true meaning of industriousness.

**Akoranga**

Doctrine, learning, training. Usually based on the traditional teachings of each tribe, iwi or Hapū. Covering values, knowledge, rules of conduct, behaviour, social rules, particular emphasis on ethics and principles.

**Arikitanga**

Chieftainship and power. The supreme power or status that can be achieved in the Māori world. A person who holds these attributes is known as an ariki. Three most important aspects of arikitanga are, chiefly lineage and territorial possession, advantage and control.

**Tohungatanga**

As a value it recognises expertise and knowledge, and the hierarchical levels of specialist knowledge and wisdom. To take into account, recognise, use, or demonstrate specialist skills and knowledge in a particular area.

**Mauri**

Life force, internal element, power, energy, essence, often said to be the binding force between the spiritual and physical dimensions

**Tapu**

Sacred, prohibited, off-limits, restricted

**Noa**

Open, accessible, available, un-restricted, common

**Tuhono**

A value that drives the process of consultation and being aware of other peoples, beliefs, ambitions, and goals. Principle of agreement and alliance (Durie 2002) usually aligned to other peoples, shareholders, beneficiaries, hapū, iwi aspirations. Cross sectoral alignment of social, cultural, economic and environmental goals.

**Purotu**

A value that prescribes transparency in what we do, and how we act, such as at the business or company level, motivating people to set in place transparent processes and systems. The principle of transparency (Durie 2002).

**Whakaritanga**

A value or principle that acknowledges other values and balanced motives are important (Durie 2002), not just profit, or financial motives. Motives such as social, political, and heritage must be balanced through wise governance.

**Paiheitia**

A value that prescribes integration across all facets of life and business. A principle of integrated multiple goals, within holistic targets and objectives (Durie 2000). It rejects a single over-arching goal and single measure of the accounting bottom line.

**Puawaitanga**

Trying always to achieve the best outcomes in a holistic way. Principle of best outcomes (Durie 2000) when taking into consideration wider social, cultural, environmental, and even broader economic perspectives by endorsing multiple measures.

**Appendix 3.** Māori Glossary of terms

Aotearoa	Common Māori name for New Zealand
Aroha	Love, compassion
Atua	God, deity, supernatural being
Awa	River or stream
Awaawa	Streams
Hapū	Sub-tribe, organised kin group, extended families, pregnant, impregnated
Hui	Meeting, gathering, place for discussions
Iwi	Tribe, people, large socio-political grouping, bones
Kai	Food
Kainga	Village, settlement
Kaitiaki	Guardians or the agent who practices or performs kaitiakitanga
Kaitiakitanga	Exercise guardianship or stewardship of the environment, heritage, culture
Karakia	Prayer
Kaumatua	Elder
Kawa	Rules, protocols, the correct procedure
Koha	Gift, offering
Korero	Speech, dialogue, narrative
Kotahitanga	Unity, consensus, togetherness
Kuia	Old woman
Kupu	Word, saying
Kura Kaupapa	Māori school, Māori way of teaching
Mahi	Work
Mana	Prestige, authority, status
Manaaki	Care for, host, hospitality, look after
Manaakitanga	Acts of giving, generosity, kindness
Manga	Tributary or stream
Mana	Prestige, control, authority
Mana Motuhake	Sovereignty, authority, autonomy
Mana Whenua	Authority over land, region, or district
Mana Moana	Authority over the sea, coast, marine, fisheries, water
Māori	Ordinary, us, indigenous people of New Zealand
Māori organisation	Iwi or hapū authority, Māori business, enterprise, Māori Trust, Māori Incorporation
Maunga	Mountain, sacred peak, high point, tipuna
Marae	Māori social centre, ancestral site, area at front of meeting house, social gathering place
Mātauranga	Māori knowledge, traditional knowledge
Mauri	A life force, life principle, internal element, metaphysical component of all things, animate and inanimate, permeates in all living things, sustains life
Mokopuna	Grandchild, grandchildren, future generations (used affectionately)
Ngahere	Forest
Noa	free from tapu, ordinary, unrestricted
Oranga	Health
Ora	Wellbeing
Pa	Fortified settlement
Pakeha	European New Zealander
Pakeke	Adult
Papa	Flat, plain, earth
Papa kainga	Ancestral land, community areas for housing, cultivation, etc.
Papatuanuku	The earth mother
Puke	Hill, ridge, high point

Ra	Day
Rangatahi	Youth, young people
Rangatira	Chief
Ranginui	The sky father
Rahui	Restrictions, regulations, temporary sanction, usually to protect or sustain resources
Raranga	Traditional weaving
Ritenga	Rules, practice, custom, regulations
Rohe	Tribal area, boundary
Rohe potae	Encircling boundaries, Hapū and iwi boundaries, catchment
Rongoa	Traditional medicinal practice, medicines from plants
Roopu	Group, council
Taiapure	Estuarine or coastal fishing areas of special significance to tangata whenua, a customary Māori area management tool
Take	Cause, issue, reason, agenda
Takiwa	Area/region/district
Tamariki	Children, young
Tane	Male, man
Tane Mahuta	God of the forests
Tangata	Man, person; <i>plural</i> tangata: people
Tangata whenua	People of the land, or people from the land, with an ancestral link and authority to a given area
Tangi	Cry
Taonga	Something treasured or precious, iconic, highly valued; e.g., treasured flora & fauna species, language, culture
Tapu	Sacred, ritual prohibition, off-limits, under divine protection
Te reo	Voice, the language, spoken, te reo Māori – the Māori language
Tiaki, tieki	Guard, protect
Tipuna	Ancestor
Tikanga	Customary values and practices, protocol, values, etiquette, custom, unspoken rules, truth, plan, correct way
Tohunga	Expert, person with specialist knowledge and skills
Wahi tapu	Place or site, wahi tapu – sacred place
Wai	Water
Wairua	Spiritual dimension, spiritual qualities
Waiata	Song
Waka	Canoe, vessel
Wananga	Traditional learning, schools of learning
Whakairo	Carving, carving in wood, story telling, decoration of houses, waka, etc.
Whānau	Family, birth, extended family, relationships
Whānaungatanga	Kinship, collective, relationships
Whare	House
Whakapapa	Genealogy, ancestral lineage, decendency, links to all living things
Whakatauaki	Proverb, saying
Whenua	Land, placenta, afterbirth

**Appendix 4.** The questionnaire used for case studies in this research (Waka Tohu project, objective 3)

**Name of organisation/business** .....

**Name and position of respondent/interviewee** .....

**Date of interview** .....

**Agreement: Release of any information from this interview will be discussed fully with the respondent before publication in any form. All case study information will need to be approved by the respondent and Māori business before being used and disclosed in this research and before publication. Some material may remain confidential, or its form may be changed, to meet requirements under intellectual property agreements in this research.**

### **Background**

What does your organisation/business do? Nature of your business? Products and services?

Description of business: .....

History: .....

Name of industry sector, e.g. Tourism? Wine? Fisheries? Property? Manufacturing? Exporting?

Technology? Other?

.....

Size of business? Number of staff? .....

Turnover? Revenue? Assets? .....

Do you market products/services nationally? internationally? If internationally what countries?

.....

.....

Do you have a vision for your company in terms of where it should be in 10 years? .....

.....

### **Recognising Māori values in business**

Do you regard your business/organisation as indigenous, is it distinctly Māori?

What distinguishes your business from a non-Māori business?

What does being Māori or indigenous mean to your organisation? How special is it? What does it mean to you personally?

Does your business/organisation best follow, or fit, a: distinct Māori business model (e.g., traditional, tikanga)? a modern western business model?, a composite business model (e.g., elements of Māori culture, tikanga and western business)? or some other? Please explain:

What are some of the key principles or philosophies your business is built on?

Are these traditional iwi Māori principles? Can you name the main ones?

How have traditional Māori principles been incorporated into your business? e.g., orally? through business plans?, strategic planning?, statement of intent?, mission statement?, products and services?, human resources?, organisational structure? conflict resolution? interaction with stakeholders? at all staff levels?

How does your organisational structure and statement of intent reflect Māori values and philosophies?

Do you think a distinct Māori or indigenous brand should be marketed nationally? Internationally? What are the reasons for this? e.g. added value to products? improved market niche? statement of identity? cultural recognition and pride? Increased revenue? Other?

### **Strategic direction and sustainable development**

Is the strategy of your business/organisation just about making profits?

Are there are other responsibilities and goals your business is trying to achieve? e.g., in addition to profits; such as social, environmental, and cultural goals, standards? Can you provide examples?

Are there any tensions or conflicts between using a western business model with more Māori or indigenous approaches to business?

Do you measure company/business performance and success by other factors? such as your achievements and performance in social, cultural, and environmental outcome areas?

Are you adopting a sustainable development approach to business?

### **Authenticating values**

How do Māori values, principles, philosophies, underpin your business? How are they translated in actions or portrayed in the business practice?

How do you balance these principles? e.g., business principles versus cultural principles, production and resource use versus environmental, social versus economic? Examples?

How does your commitment to Māori? to iwi/hapū? beneficiaries? shareholders? affect your business?

### **Processes and standards**

What processes, systems, and standards do you have in place? Response to legislative requirements?

What processes are in place to authenticate Māori values, philosophies, tikanga?

Should a Māori business have a set of cultural standards (e.g., derived through a business plan)?

Would the Māori community, iwi, Hapū, support your statements, re portrayal of values and authenticity.

### **Barriers/advantages**

Background? comment?

Is incorporating Māori values and principles in business a barrier or limitation to doing business?

How does your business benefit Māori, iwi? hapū? stakeholders?

Can Māori business achieve competitive advantage based on unique cultural dimensions of governance and performance?

### **Intellectual property issues**

Is intellectual property (IP) of products and services an important consideration or issue in your business?

What IP mechanisms do you have in place to protect your business knowledge, products, services?

What forms of IP protection are used in the area of cultural heritage? Mātauranga? Other forms of cultural knowledge?

**Interview complete**

Are there sections of this interview you do not want disclosed? Please highlight

All documented information from this interview will be passed back to the respondent before any publication of research results.

Respondent

Signed.....Date.....

Interviewer.....Date.....

**Case Study template**

Name of organisation/business.....

1. Background
2. Recognising Māori values in business
3. Strategic direction and sustainable development
4. Authenticating values
5. Processes and standards
6. Barriers/advantages
7. Intellectual property issues
8. Conclusions
9. Acknowledgements



**Appendix 5.** Intellectual property framework, plans, and relevant links for the Waka Tohu programme

Intellectual Property framework and plan for Māori business branding: achieving competitive advantage in Māori business branding 7931-ABEP-MANATAIAO – March 2004 by Garth Harmsworth, Landcare Research NZ Ltd. Palmerston North

**Identify issues of intellectual property associated with this research and agree on management processes with the research team and key stakeholders.**

*The research team see this as an evolving document that will be updated, revised, and followed during the course of this research.*

**Issues**

The following issues have been identified to date:

- What is IP protection of a brand
- Who owns the IP created by this project (7931-ABEP-MANATAIAO)
- The use of Mātauranga Māori (Māori knowledge), both traditional and contemporary forms of knowledge from a Māori source
- Intellectual property agreements, use and content
- The use and publication of all acquired information from this project, including the recording, collation, and dissemination of company or business knowledge (e.g., from interviews, questionnaires, surveys)
- Definitions of what constitutes intellectual property from an indigenous Māori and from a conventional/international perspective. Following on from this, what forms of IP protection have been implemented by Māori businesses in the area of cultural heritage
- Separation of public domain information from confidential or sensitive information; the use of robust criteria to separate information types
- The use and understanding of Māori symbols, designs, images, words, branding
- Prevention of the unintentional release of commercially sensitive information
- Intellectual property embodied in culturally based governance and corporate strategies, in corporate documents and records, and in corporate web sites
- All published information from this research
- All presented information from this research, e.g., hui/workshops/seminars/project meetings
- Information released to and developed as publicly accessible sites, such as networks, internet, web sites.

---

## A framework and management process for handling intellectual property

---

Issues are being highlighted and dealt with through an intellectual property management framework and process developed as part of this research, and also in conjunction with key stakeholders. The framework starts with a definition of intellectual property from a conventional or mainstream legal perspective.

### Intellectual property (IP)

#### Definitions:

Intellectual property is most commonly defined as a ‘product of the mind’ and is property the owner has a right to sell, licence, assign, or transfer (Pye 2003). It includes:

- Trade secrets and know-how (e.g., scientific or business expertise)
- New ideas and ways of doing things
- Inventions, software, processes and other technology capable of being patented and/or licensed

Intellectual property covers both registered and unregistered knowledge, and may therefore include: inventions, product lines, images and branding, printed and electronic publications, living organisms and their products, reference collections and associated data, research proposals, data and results.

### Main types of intellectual property and examples of mechanisms used to protect IP

#### Automatic (Unregistered) IP Rights

- Confidential information, trade secrets, know-how  
*Protection mechanism: a non-disclosure agreement (NDA)*
- Copyright in written and graphic (including photographic) material, computer databases and programmes, computer and business models
- Goodwill, reputation, trading names

#### Formal (Registered) IP Rights (*usually requires some form of conscious action and process*)

- Patents (country-specific but PCT filing possible)
- Trade marks (use <sup>TM</sup> symbol until registered, then use ® symbol)
- Plant variety rights (new distinctive forms, uniform and stable; not bacteria or algae)
- Designs, branding, images (protects the appearance of an article/product)

“Patents expire, copyrights eventually run their course, but trademarks last forever” (Roberts 2003)

Note: geographical indications used to identify goods that have a specific geographical origin (e.g., Champagne) may be protected against use by others, see:

[http://www.med.govt.nz/buslt/int\\_prop/info-sheets/geog-ind.html](http://www.med.govt.nz/buslt/int_prop/info-sheets/geog-ind.html)

### Ownership of intellectual property

To determine ownership, intellectual property (IP) is usually characterised and separated first into types or groups, for example, IP that should be retained and kept secret or confidential, and IP that needs protection before being passed on. The question of ownership requires a conscious decision to be made and a set of actions to be carried out, e.g., ownership of the IP may need to be stated in a contract. The decision about ownership of intellectual property lies with the owners or the originating party or parties, under several mechanisms, usually where:

- IP is developed using the resources of the owners or the originating party/parties
- Agreements are in place to ensure legal ownership
- Ownership of IP arises from commercially contracted work or collaborative work
- Ownership of IP is agreed before the start of a project or the work
- Treaty Claims, such as WAI 262 (see web sites below), must be regarded

To identify whether IP needs protection and to identify the mechanisms required for that protection, a number of factors need to be taken into account. Potential IP issues are explored and acted on through:

- An education process and the raising of awareness about IP
- Regular reviews
- Mechanisms to encourage and help people identify potential IP areas
- Through copyright protection of datasets, databases and publications
- Pursuit of commercialisation of technologies in the long term where appropriate

### **Protection of IP**

Within a business or company context there are several areas where protection of IP is necessary:

- An IP management process and records need to be maintained by staff working on projects likely to develop patentable IP
- Decisions on appropriate protection need to be made in consultation with senior management, legal advisors and the client, as appropriate
- All staff within a company or business need to be made aware that they have a responsibility to protect IP

### **Mechanisms for commercialising IP**

A number of situations determine the mechanism for commercialising intellectual property. These include taking into account the need to:

- Establish whether you have freedom to operate (FTO), e.g., by undertaking a search of the patent and trade mark databases, and by carrying out a web site and literature search
- Protect against disclosure and/or prior publication of patentable matter
- Make sure you do not inadvertently give ownership of IP away at proposal or contract stage
- Decide on options, including outright sale of know-how/licensing of IP rights, joint ventures, and fees for service (**NB.** IP usually goes to a person or an organisation paying for it, unless a contract specifies otherwise)

A number of mechanisms can be adopted for commercialising IP. The main ones are patents and licensing agreements.

### **Patents**

The main features of patents are:

- Benefits, such as exclusive rights for 20 yrs; competitors are therefore deterred from infringing (**NB.** Those who hold a patent must be prepared to defend it actively)
- Scope, which includes a new or improved product, process or method of manufacture
- Criteria, which include industrial applicability; inventive element (non-obvious) and no prior publication or use
- The costs of preparing and lodging patents are high – in the tens of thousands of dollars

### **Licensing agreements**

The main features of licensing agreements are that they:

- Grant permission to make, use and/or sell a product, process or technical expertise in return for a royalty

- Itemise important elements, including quality control, performance criteria, exclusivity, territory and grounds for termination
- Provide rights and obligations to both licensor and licensee that are negotiated and recorded in the licensing agreement

**Summary**

Appendix 5 Table 1 identifies the main categories of IP protection for property, such as knowledge, methods, products, branding, and published material. Appendix 5 Table 2, shows some of the questions, processes, steps, and who should be responsible, to achieve IP protection.

**Appendix 5: Table 1.** Main categories to consider for IP protection

<b>Main categories</b>									
<b>Types of IP</b>	Confidential information	Patent	Trade Marks ™	Copyright ©	Registered Design®	Geographic Indications	Plant Variety Rights	Internet	Other
<b>Examples</b>	Know-how/trade secrets Mātauranga Methods Processes Inventions	Products from Bioprospecting	™or ® for unique word/s and/or symbol/s	Use © Mana Taiao 2004 on written material	Branding Images Appearance of any original design with original IP	Kapiti Cheeses use of hipi iti instead of feta	Ornamental cultivars of native plants	Domain names, e.g., .com; .co.nz Include copyright statement/disclaimer	

**Appendix 5: Table 2.** Steps to go through and questions to ask

In terms of IP protection a process model is given with the following steps:

<b>Question</b>	<b>Process, mechanism</b>	<b>Responsibility</b>
1. What is it?	Need to identify and define	Staff, researchers, management
2. Who presently owns it, or potentially who should own it?	Whose IP is it? Freedom to operate (FTO)	Internally – employee, researchers Externally – there will be a need to check what is already under the IP model (example) clauses
3. How?	Nature of product What mechanisms to use Best form of IP protection	Legal advice

---

## Intellectual Property examples for “Māori business branding: achieving competitive advantage in Māori business branding” 7931-ABEP-MANATAIO

---

Examples of IP considerations and agreements being used in the Māori business-branding project are shown below. Appendix 5 Table 3 provides a management process being followed by researchers and with key stakeholders.

Agreements with all participating organisations and individuals will cover confidentiality issues through written sections and clauses. If necessary, interviewers will provide interviewees with a non-disclosure agreement (NDA) – or obtain permission to release only information stated not to be confidential – and recorded information may have to be aggregated in a generalised form before release. Information recorded from any interview needs to be classified and organised into IP types and given IP status (Appendix 5 Table 3).

A Questionnaire developed in Objective 3 ‘Māori values in Māori business: Identify how Māori companies integrate their unique cultural heritage into their business approach’ begins every questionnaire with the following statement:

**Agreement: Release of any information from this interview will be discussed fully with the respondent before publication in any form. All case study information will need to be approved by the respondent and Māori business, before being used and disclosed in this research and before publication. Some material may remain confidential, or its form may be changed, to meet requirements under intellectual property agreements in this research.**

### Questions being asked of participating representatives from Māori businesses include:

- Can you outline or provide examples of your intellectual property issues?
- Is Intellectual Property (IP) of products and services an important consideration or issue in your business?
- What IP mechanisms do you have in place to protect your business knowledge, products, and services?
- What forms of IP protection are presently used in the area of cultural heritage? Mātauranga? Other forms of cultural knowledge?

At the completion of each interview all sections are discussed and signed off:

Questions include: “Are there sections of this interview you do not want disclosed?” “Please highlight”.

And statements: “All documented information from this interview will be passed back to the respondent before any publication of research results”.

“Respondent

Signed.....Date.....”

Interviewer.....Date.....”

**Appendix 5: Table 3.** Example of a method to classify and categorise information into IP types

All information and knowledge obtained from organisations and individuals will be organised into the following categories/groups	<i>IP categories/groups</i>			
	<i>1. Confidential, secret, protected</i> Not disclosed	<i>2. Confidential, limited protection, conditional access, limited, controlled publication and use</i>	<i>3. IP conditions defined, protective action, conditional use and availability</i>	<i>4. Public domain, unrestricted, available for publication and use</i>
Item, e.g.: knowledge, information, brands, designs, ideas, talks	<i>Interviews</i> Designs Ideas Knowledge Mātauranga Māori	<i>Interviews</i> Designs Ideas Knowledge Mātauranga Māori	<i>Interviews</i> Designs Ideas Knowledge Mātauranga Māori	<i>Interviews</i> Designs Ideas Knowledge Mātauranga Māori
Other IP				

### **Confidentiality, ownership, and use of intellectual property**

Use of information in the Māori business-branding programme (7931-ABEP-MANATAIAO) follows MOU agreements between businesses and researchers. The confidential nature of some information and associated intellectual property rights will affect the way the information is finally documented and used.

Collaborative projects that divulge knowledge and information, or use Māori and business knowledge in research need to be aware of the confidential and sensitive nature of these knowledge forms. Frameworks and a management process must be in place to protect or exclude this information from the public domain or general readership. It is the intention of the Māori business-branding programme not to disclose any information that Māori businesses regard as commercially sensitive, restrictive, or confidential. The procedures for publishing results from this research are being fully discussed with participant Māori businesses, and it has been agreed that no results would be disseminated without prior consultation, approval, and the appropriate acknowledgement of those participating in the research.

Any information used through internet web sites will be used only with the express permission of individuals and groups participating in this research, or where information has been used from public domain sites, publications, and publicly accessible information such as annual reports and company web sites. All publication will be under the guidance and agreement of participating groups. All intellectual property identified in this project as confidential will have protected or limited access.

It was necessary at the start of the project to provide some clear explanations and guidelines to cover use of Māori knowledge (mātauranga Māori) and company information. This has been achieved to some degree with memoranda of understanding (MOU) and intellectual property agreements set up during interviews with key researchers and participating organisations (Landcare Research 1998–2003). Information acquired during research should only be used in accordance with the wishes of the participating groups, especially where this involved confidentiality and sensitivity issues. Agreements signed at commencement of this research stated, for example:

*Ownership of all existing proprietary data and information (including mātauranga) used for the Work remains with the originating Party, and such existing data and information may only be used for the Work for which it is supplied. Further use or disclosure of such existing data and information by either Party will require the written approval of the owning Party.*



Agreements went on to state there was a distinction between original information/data and new or modified data/information:

*New data and information (i.e. data changed substantially in form from the original data or new methods) obtained during the Work shall be jointly owned by Mana Taiao and researchers and the 'Māori business/company/researcher'. Methodological approaches developed by either party shall be the property of the developing party. Publication of scientific papers, reports, popular articles, and any form of media release based wholly or in part on such new data and information will require written approval of Mana Taiao and the research management Komiti and the 'Māori business/participating organisation or individual. Furthermore, each Party agrees not to represent the other Party in any forum, without the express permission of the other Party.*

## Relevant Intellectual Property web sites

A number of web sites should be visited when developing intellectual property statements, mechanisms, and agreements. Some of these are shown below and will be added to during the course of this research 2003 – (7931-ABEP-MANATAIAO).

### International

The Intellectual Property Law server provides information about intellectual property law including patent, trademark, and copyright. Comprehensive links are given to other sites:

<http://www.intelproplaw.com/>

The World Intellectual Property Organisation (WIPO) gives information on all aspects of IP and extensive links. A useful definition of IP is given at: <http://www.wipo.int/about-ip/en/overview.html>

For those wishing to copyright DNA (genetic material, gene mapping), plants, animals, and species or wishing to become a partner or know more information on the DNA Copyright Institute, an America based company: <http://www.dnacopyright.com/index.html> (**NB.** May not have any legal status outside of the USA).

### Important web sites for international trading include:

The International Social and Environmental Accreditation and Labelling (ISEAL) Alliance:

<http://www.isealalliance.org/>

The ISEAL Alliance is a formal association of leading international voluntary standards, certification and accreditation programmes focused on social and environmental issues. The member organisations of ISEAL have a common vision of a world where ecological sustainability and social justice are the normal conditions of business.

ISEAL are assisting their members to achieve this vision by supporting their standards and verification programmes to attain a high level of quality and to gain public credibility, political recognition and market success.

The Global Ecolabelling Network (GEN) <http://www.gen.gr.jp/>

A non-profit association of third-party, environmental performance labelling organizations founded in 1994 to improve, promote, and develop the "ecolabelling" of products and services.

### Aotearoa-New Zealand

The Ministry of Economic Development has comprehensive information sheets about the various types of intellectual property: [http://www.med.govt.nz/buslt/int\\_prop.html](http://www.med.govt.nz/buslt/int_prop.html) - pla

The Intellectual Property Office of New Zealand (IPONZ) is a business unit in the Ministry of Economic Development:

<http://www.iponz.govt.nz/search/cad/dbssiten.main>

Trademark magazine:

<http://www.nzte.govt.nz/article/0,1973,SectionID%253D13322%2526ContentID%253D6828,00.html>

The Plant Variety Rights (PVR) office in New Zealand, is part of the Ministry of Economic Development, and administers the Plant Variety Rights Act 1987, under which grants and IP protection is issued to breeders of new plant varieties: <http://www.pvr.govt.nz/>

For advice on intellectual property and product development and marketing, New Zealand Trade and Enterprise: <http://www.nzte.govt.nz>

The Māori Enterprise team, located within New Zealand Trade and Enterprise, can help Māori businesses build capability and identify overseas markets:

<http://www.nzte.govt.nz/article/0,1973,SectionID%253D11966,00.html>

### **Māori (indigenous) trademarks**

The Māori trademark advisory committee, within IPONZ, has been established under the New Zealand Trade Marks Act 2002:

<http://www.iponz.govt.nz/search/cad/dbssiten.main>

<http://www.iponz.govt.nz/search/cad/dbssiten.main>

Toi iho is a Māori registered trademark used to promote and sell authentic, quality Māori arts and crafts, and has been developed for Māori artists in Aotearoa-New Zealand:

<http://www.toiiho.com/>

### **Māori issues regarding IP**

Many of the Māori IP issues in Aotearoa-New Zealand relate to the misuse and exploitation of Māori images, symbols, knowledge, products, trademarks, and taonga (natural resources). Such misuse and exploitation point to the need for robust systems and mechanisms to protect cultural heritage, Mātauranga (Māori knowledge), and cultural heritage in the public and international arena. The following sites provide some understanding of issues:

A large number of Māori issues relate to IP for cultural rights and protection over indigenous flora and fauna, and any laws relating to intellectual property rights/ownership to indigenous species, with respect to the Wai 262 claim. The claim is explained and summarised at the following sites:

<http://www.waitangi-tribunal.govt.nz/research/wai262/wai262xxxx.asp>

<http://www.wai262.co.nz/wai262.html>

The 1993 Mataatua Declaration from Aotearoa-New Zealand provides information on the cultural and intellectual property rights of indigenous people. A summary is given at:

[http://www.tpk.govt.nz/publications/docs/tangata/app\\_e.htm](http://www.tpk.govt.nz/publications/docs/tangata/app_e.htm)

Māori biotech patenting concerns are given at:

[http://www.med.govt.nz/buslt/int\\_prop/biotech/patentbiotech-10.html](http://www.med.govt.nz/buslt/int_prop/biotech/patentbiotech-10.html)

Patenting issues: [http://www.med.govt.nz/buslt/int\\_prop/Māoripatent/Māoripatent-02.html](http://www.med.govt.nz/buslt/int_prop/Māoripatent/Māoripatent-02.html)

Biotech inventions +issues

[http://www.med.govt.nz/buslt/int\\_prop/biotech/patentbiotech.html](http://www.med.govt.nz/buslt/int_prop/biotech/patentbiotech.html)

[http://www.med.govt.nz/buslt/int\\_prop/Māoripatent/Māoripatent.html](http://www.med.govt.nz/buslt/int_prop/Māoripatent/Māoripatent.html)

[http://www.med.govt.nz/buslt/int\\_prop/Māoripatent/Māoripatent-03.html](http://www.med.govt.nz/buslt/int_prop/Māoripatent/Māoripatent-03.html)

Maui Solomon has a comprehensive summary of indigenous property rights and issues, and challenged the Danish company Lego over the use of Māori words and images in a bionicle game:

<http://www.inmotionmagazine.com/ra01/ms2.html>

[http://www.turtletrack.org/Issues01/Co11032001/CO\\_11032001\\_Lego.htm](http://www.turtletrack.org/Issues01/Co11032001/CO_11032001_Lego.htm)

Kingi Gilbert provides a summary of New Zealand intellectual property concerns

<http://www.scoop.co.nz/mason/stories/PO0305/S00012.htm> and challenged the international

company Sony about the use of Māori images, words and culture in the Mark of Kri playstation game: <http://www.aotearoa.Māori.nz/viewtopic.php?t=285>

### **Indigenous flora and fauna**

Although there are some laws about milling indigenous timber and clearing native vegetation on private land, as well as the Plants Variety Rights Act (for breeders protecting cultivars) – see <http://www.pvr.govt.nz/> – there is little protection or determination of property rights for indigenous species, unless the Treaty of Waitangi is used. However, because genetic engineering and DNA technology are increasingly used to define and classify genes, breeds, and species, it is likely this technology and its associated tools will be used in future to determine the ownership of plants, animals, bacteria, fungi, viruses, other organisms, and any products or technology derived from these.

*Adapted from Catherine Iremonger, University of Waikato: “One way to define, protect, and manage specific resource taonga of flora and fauna, is to take samples of indigenous species from the environment and map the boundaries of taonga, e.g., developing a botanical or species collection, mapping the ecological extent (or rohe) of the species in resource inventories, and then classifying all species with Māori and scientific names.*

This can be carried out through ecological surveys at the marae, whānau, Hapū, or iwi level. Collect samples, such as leaves, seed, fungi, and lichen, and dry or preserve them. Record where you have taken the samples from and define the location. Catalogue and name the species you have found, and store them appropriately in botanical herbariums, scrapbooks, plates, or glass jars. For insects, birds and animals, a database can be established for your catalogue”. Information on resource inventories can be found at: <http://www.landcareresearch.co.nz/research/biodiversity/>

The National Vegetation Survey Databank run by Landcare has some good examples of how to undertake an ecological survey: <http://nvs.landcareresearch.co.nz/>

To locate and record species information, mapping systems can be found at: [www.geosystems.co.nz](http://www.geosystems.co.nz)

It is important to take into account the seasonality that affects species populations and distribution.

Information can also be collected on flora and fauna using past records from Mātauranga, manuscripts, historical information from local history books, museums, and past ecological and genetic studies on species. Also soil samples (with pollen/seeds in it) and old photographs/site maps can be used to map the extent of ecosystems. From this information a rough estimate of the extent of past ecosystems and species distribution can be derived. Land Environments New Zealand (LENZ) provides a valuable historical basis or baseline for ecosystems of the New Zealand landscape: <http://lenz.landcareresearch.co.nz/>

Samples can also be stored until DNA mapping or fingerprinting is more affordable. When resource taonga can be recorded using scientific and cultural classifications, supported by genetic techniques, flora and fauna can be defined accurately for IP protection. This would prescribe a method to define or compare cultural, ecological or commercial losses via loss of intellectual property and biological resources should any future genetically engineered organisms/species be released into the environment.

#### **Other Māori sites with information on IP**

Some information on intellectual property issues and Māori can be found at:

<http://www.tpk.govt.nz/>

Federation of Māori Authorities (FOMA):

<http://www.foma.co.nz/static/index-foma.htm>

The Waitangi Tribunal has comprehensive information on Treaty of Waitangi claims:

<http://www.waitangi-tribunal.govt.nz/about/treatyofwaitangi/>

<http://www.tpk.govt.nz/publications/subject/default.asp#gov>

#### **International indigenous sites**

A summary of the draft United Nations 1993 Declaration on the Rights of Indigenous Peoples is given at: <http://www.tpk.govt.nz/publications/docs/tangata/index.htm>

Article 29 of the Declaration refers to intellectual and cultural property rights of indigenous people globally:

<http://www.tpk.govt.nz/publications/docs/tangata/rights.htm>

<http://www.tpk.govt.nz/publications/docs/tangata/draft.htm>

The World Intellectual Property Organisation (WIPO) web site provides a forum for international debate concerning the interplay between intellectual property (IP) and traditional knowledge, genetic resources, traditional cultural expressions (folklore), and is in the process of developing a range of practical tools aimed at enhancing the IP interests of the holders of such knowledge, resources and expressions. The site can be visited at: <http://www.wipo.int/tk/en/index.html>

#### **Appendix 5: References**

Pye, Pamela, 2003: Unpublished presentation on 'Protecting and commercialising intellectual property (IP). Māori business branding project management meeting, 15 October 2003, Trade and Enterprise building, Wellington.

Landcare Research 1998–2003: Technical service agreements and Memoranda of understanding. Lincoln, Landcare Research.