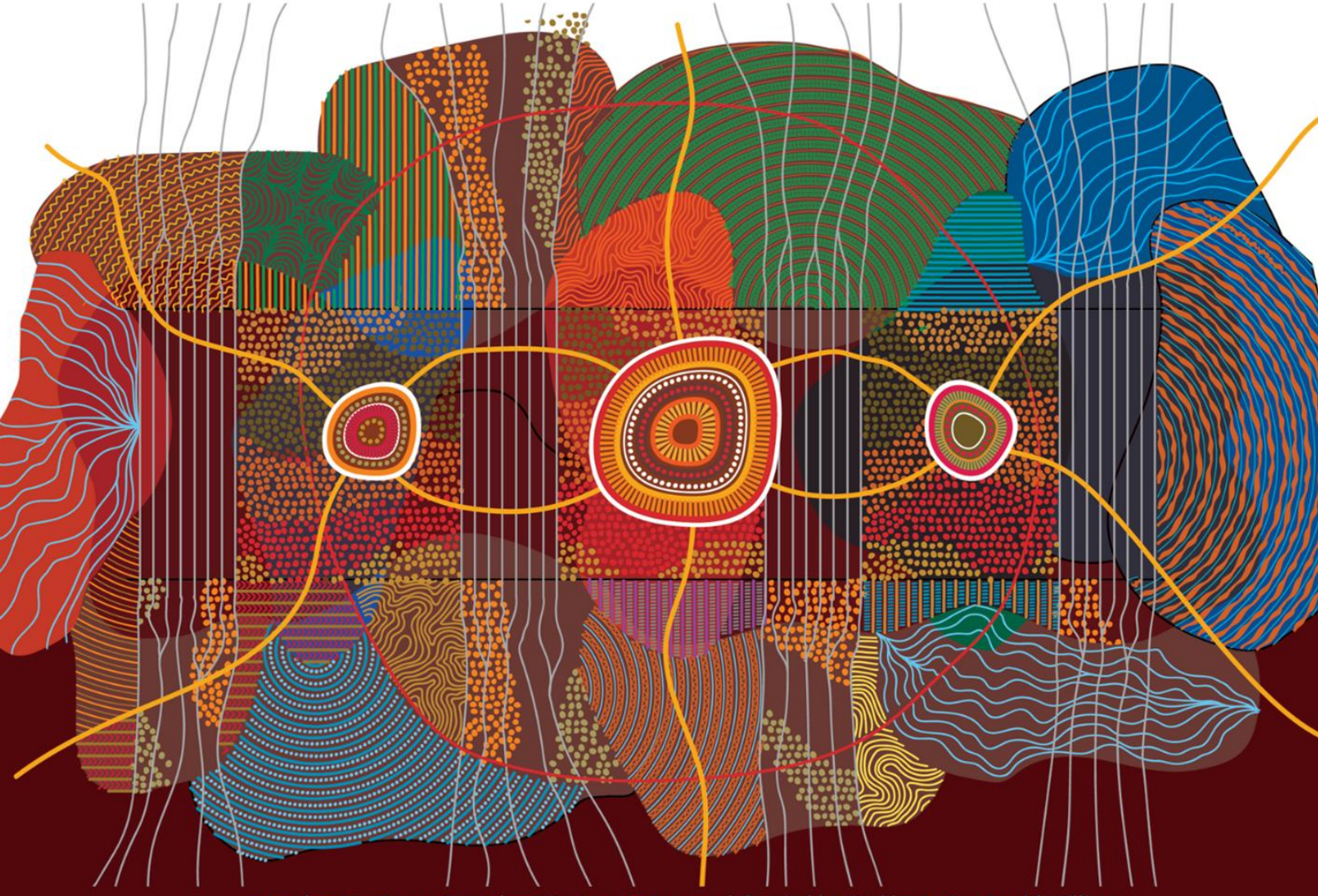
Indigenous Agricultural Product Framework Project

Final Report



Together We Grow, Together We Prosper' artwork by Wakka Wakka artist, David Williams.

Australian Government
Department of Agriculture, Fisheries and Forestry

Australian Government
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National Farmers Federation

PEOPLE. COUNTRY. OPPORTUNITY.

Acknowledgement of Country

We acknowledge Aboriginal and Torres Strait Islander peoples as the Traditional Custodians of our land and waters. We respect the spiritual, social, cultural, environmental, and economic practices connected to Country, and ongoing importance of cultural and heritage beliefs, languages and Lore today.

The National Farmers Federation and the Indigenous Agricultural Product Framework team pay our respects to Elders, past and present, and to the youth, for the future. We extend this to all Aboriginal and Torres Strait Islander people reading this report.

Please note that in this document the term Aboriginal and Torres Strait Islander people is used. We acknowledge and respect that it is preferable to identify Aboriginal and Torres Strait Islander people, where possible, by their language group or nation.

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Cultural Protocol Acknowledgement:
The consultation process was conducted in accordance with cultural protocols, including seeking free, prior and informed consent, respecting cultural intellectual property, and ensuring community ownership of knowledge shared. We express our sincere gratitude to the many Elders, knowledge holders, and community leaders who guided and shaped this work.

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Executive summary

Unlocking Value through Cultural Integrity in Agriculture

Australia is at a pivotal moment in recognising and empowering the economic, cultural, and environmental contributions of Aboriginal and Torres Strait Islander peoples in agriculture. Despite their deep and ongoing relationship with Country and land stewardship, Aboriginal and Torres Strait Islander producers face systemic barriers to full participation in agricultural value chains. At the same time, there is growing interest from domestic and international markets in products that reflect authentic cultural origin, ethical production, and ecological sustainability.

In response, the Indigenous Agricultural Product Framework (the Framework) has been developed to provide a nationally consistent, culturally grounded, and market-relevant system for identifying and promoting Indigenous agricultural products. It aims to deliver value to Aboriginal and Torres Strait Islander producers through recognition, access to premium markets, and control over cultural representation, while also offering assurance and traceability to consumers, governments, and industry.

This project was commissioned by the Department of Agriculture, Fisheries and Forestry, in collaboration with the National Farmers' Federation (NFF) and the Indigenous Land and Sea Corporation (ILSC). It involved deep engagement with Aboriginal and Torres Strait Islander stakeholders, legal and policy experts, agricultural economists, and international traceability specialists. Through this process, five defining characteristics of an Indigenous agricultural product were validated:

- Indigenous ownership
- Cultural connection
- Connection to Country
- Caring for Country
- Access and benefit-sharing with community

Building on this foundation, and what the contents of this report explores, is the recommended path forward. This includes the adoption of an *Enhanced Assurance* credentialing model—governed by a majority-Indigenous national body and supported by appropriate technology, data standards and verification mechanisms. This model is designed to uphold cultural sovereignty, support digital and data infrastructure needs, and foster trust across markets.

Key benefits and outcomes of the credential model include:

- Economic self-determination for Aboriginal and Torres Strait Islander producers and peoples
- Support for environmental sustainability through Indigenous land practices
- A trusted mechanism for procurement and export differentiation
- Alignment with national policy goals, including Closing the Gap and ESG investment strategies
- Recognition of Indigenous Cultural and Intellectual Property (ICIP) where possible.

This final report covers:

- Credentialing models and governance
- Interoperability and international traceability frameworks
- Capacity-building pathways for Indigenous producers.

Foundational Decision Points

The foundational decision points in this report address the system architecture and governance settings required to support the operation of a national credential. These recommendations are highlighted in their respective Chapters of this report and have been summarised below as follows:

Table 1 - Foundational Decision Points

Foundational Decision Point	Summary	Report Reference
National Definition and Framework Structure	Create a nationally recognised definition that applies the five validated characteristics: Aboriginal and Torres Strait Islander business ownership, connection to culture, connection to Country, Caring for Country, and benefit-sharing with community.	Chapter 2
Credential Model Selection	Adopt the Enhanced Assurance model for national credential delivery.	Chapter 3
Governance Structure	Establish an Aboriginal and Torres Strait Islander led credential oversight body with transitional government support; embed cultural protocols, verification standards and audit processes.	Chapter 4
Standards Alignment	Align credential systems with GS1, ISO, W3C standards; enable global interoperability for export and supply chain integration.	Chapter 6
Data Governance	Embed Indigenous Data Sovereignty principles from the outset; ensure producers retain ownership and control of cultural, commercial and environmental data.	Chapter 6
Cross-Government Coordination	Establish an Inter-Agency Taskforce for formal coordination across DAFF, DFAT, Austrade and other partner agencies for integrated delivery.	Chapter 7
Industry Capability Uplift	Deliver skills programs, digital enablement, blended finance, seed funding and concessional loans to support producer readiness.	Chapter 8

By establishing this Framework, Australia can elevate Indigenous knowledge systems, strengthen Indigenous economic participation, and reinforce its global leadership in ethical and sustainable agriculture.

Strategically, the Framework aligns directly with national policy commitments including the National Agreement on Closing the Gap, the National Agreement on Indigenous Economic Participation, and the emerging Indigenous Knowledge priorities under Australia's biosecurity and sustainability agenda. It offers a tangible, scalable mechanism for advancing equity and recognition within the agricultural sector, while positioning Australia as a global leader in ethical provenance systems.

1. Project background

Background and Context

The Indigenous Agricultural Product Framework (the Framework) emerged from a clear recognition: that while Aboriginal and Torres Strait Islander peoples have been custodians of land, water, and food systems for tens of thousands of years, their agricultural products remain under-recognised in formal markets. Existing credential mechanisms fail to reflect Aboriginal and Torres Strait Islander values, ownership, and connection to Country. This gap presents both a structural inequity and a strategic opportunity.

The development of the Framework responds to national calls for structural reform and economic inclusion, providing a platform to amplify Aboriginal and Torres Strait Islander-led agricultural enterprises, protect cultural and intellectual property, and deliver meaningful outcomes through sustainable trade.

Australia is seeing a rising demand for Indigenous agricultural products – from bush foods to premium livestock – along with growing recognition that Aboriginal and Torres Strait Islander communities should drive and benefit from this growth. As part of an earlier report for this project, the economics firm, Polis Partners, estimated that Indigenous agriculture (including Indigenous/non-Indigenous partnerships) contributes around A$1.4 billion to the economy and ~1,900 jobs. Consumers have a positive sentiment towards buying Indigenous-branded products, seeking authenticity and cultural connection. However, to capitalise on this opportunity, a robust Indigenous Agricultural Product Framework is needed. This Framework will help recognise, protect and authenticate Indigenous products, ensuring that First Nations producers gain premium value, market access, and fair returns across supply chains.

This report details the Framework, which is aligned with Aboriginal and Torres Strait Islander led principles and grounded in First Nations self-determination. The Department of Agriculture, Fisheries and Forestry (DAFF) affirms, "We commit to empowering First Nations economic self-determination across Australia's agricultural, fisheries and forestry industries. We do this by working in partnership with First Nations stakeholders and elevating First Nations voices through ongoing engagement"[1]. The Framework is therefore developed by First Nations people for First Nations people, ensuring it reflects Aboriginal and Torres Strait Islander values and aspirations.

Establishing the Evidence Base for the Framework

The design of the Framework has been underpinned by a comprehensive and collaborative research process involving Aboriginal and Torres Strait Islander communities, legal experts, economists, and policy stakeholders. A series of key reports were commissioned across the project's lifecycle to inform the design, validation, and implementation strategy of the Framework. Each report addressed a critical aspect of the credential system from defining cultural legitimacy and legal protections to assessing market readiness and business model viability.

These reports were strategically sequenced and synthesised to form a robust, evidence-based foundation for the Framework. Their findings ensured that the Framework reflects

[1] Department of Agriculture, Fisheries and Forestry. (2024, August). *Statement of strategic intent: Growing Australia together*. Department of Agriculture, Fisheries and Forestry. https://www.agriculture.gov.au/sites/default/files/documents/daff-statement-of-strategic-intent.pdf

cultural values, responds to on-the-ground realities of Aboriginal and Torres Strait Islander producers, and meets the expectations of domestic and international markets.

Table 1 below summarises these foundational documents, highlighting their scope, key insights, authorship, and contribution to the final design of the Framework. It offers readers a clear line of sight between the evidence gathered and the strategic decisions embedded in the Framework. This report should be read in conjunction with this wider body of evidence.

Table 2 - Key Reports, Insights and Actions from the Indigenous Agricultural Product Framework project

Report Name	Description	Key Insights	Author	Contribution to Final Framework	Data Sources / Methodology	Key Recommendations / Actions
Assessment Report (June 2024)	Initial consensus-building report defining Indigenous Agricultural Products and exploring stakeholder support for a credential system.	Five key characteristics identified; strong stakeholder support for a credential system; importance of cultural and environmental value recognition.	*yamagigu* Consulting	Established foundational definition and stakeholder consensus for what constitutes an IAP.	Stakeholder consultations, literature review	Adoption of shared definition; use 5 characteristics as baseline for credentials.
Mid-Outcome Report #2 (August 2024)	Mid-point evaluation of consumer sentiment, economic value estimates, and challenges faced by Aboriginal and Torres Strait Islander producers.	Positive consumer sentiment; potential market size of $633M; barriers include low visibility, supply inconsistency, and access to capital.	*yamagigu* Consulting	Quantified economic potential and identified key barriers to realising market opportunity.	Consumer research, market analysis, economic modelling	Build visibility and consistency; prioritise investment in producer capacity.
Terri Janke Regulatory & Best Practice Report (May 2024)	Legal and cultural analysis of frameworks protecting Indigenous agricultural products.	No current legal protections specific to IAPs; recommends FPIC, ICIP protection, and benefit sharing; supports Indigenous governance.	Terri Janke and Company	Provided legal analysis supporting ICIP protections and governance mechanisms.	Legal review, IP case studies, policy analysis	Integrate FPIC, ICIP, and community benefit sharing into credential system.

Benefits and Gaps Analysis (Feb 2025)	Evaluates three credential models and their feasibility based on benefits and implementation challenges.	Enhanced Assurance Model offers best cost-benefit; credentials promote market access, economic empowerment, and cultural protection.	*yamagigu* Consulting, Polis Partners	Recommended optimal credential model with strongest cost-benefit performance.	Total addressable market (TAM), serviceable addressable market (SAM), and serviceable obtainable market (SOM), scenario modelling	Offers 3 credential models that have been consulted with the sector.
Draft IAP Framework (Feb 2025)	Synthesises project findings into a draft strategic framework with implementation principles and stakeholder roles.	Outlines vision, principles, and pillars; emphasises cultural integrity, transparency, and governance; aligns with Aboriginal and Torres Strait Islander values.	*yamagigu* Consulting	Integrated all findings into a strategic framework and implementation blueprint.	Synthesis of prior reports, strategy development	Ensure Aboriginal and Torres Strait Islander-led governance and credential transparency; align with policy goals.
Export Maturity and Opportunities Assessment (June 2025)	Assesses export potential and readiness for IAPs, including credential impact and global market alignment.	Credentials linked to export success; premium pricing potential; importance of traceability, branding, and strategic partnerships.	*yamagigu* Consulting	Framed export readiness and international alignment; reinforced credential value proposition.	Export case studies, global trends analysis, stakeholder interviews	Align credential development with export demand; partner with Austrade and DFAT.

Purpose and Scope of the Report

The purpose of this report is to articulate the rationale for a nationally recognised Framework and to outline the strategic, policy, and operational considerations necessary for its implementation. Drawing on extensive consultation, economic analysis, international benchmarking, and cultural insight, the report provides a comprehensive blueprint for establishing a culturally legitimate and commercially viable credential system.

The report is intended to inform government agencies, Aboriginal and Torres Strait Islander organisations, industry stakeholders, and policy-makers by presenting a structured approach to system design, governance, investment, and delivery of a National Indigenous Agricultural Product Framework.

The report is organised as follows:

- **Chapter 2:** Outlines the design of the Indigenous Agricultural Product Framework, including its working definition and five defining characteristics
- **Chapter 3:** Evaluates sustainable business models for the credential system and presents the results of a cost-benefit analysis of these three options
- **Chapter 4**: Assesses governance and ownership models for the Framework, with a focus on pathways to ensure cultural legitimacy, sustainability, and Indigenous self-determination
- **Chapter 5:** Strategic pillars to deliver the Framework
- **Chapter 6:** Details the enabling technology and data standards required to support the Framework, including alignment with international best practices
- **Chapter 7:** Examines the interoperability challenges across Indigenous agricultural supply chains and proposes mechanisms for system-wide integration
- **Chapter 8**: Addresses sector capability gaps and proposes an industry uplift agenda to support producer participation
- **Chapter 9**: Sets out a staged roadmap for the Frameworks implementation, identifying key milestones and activities over a multi-year horizon.

This structure is designed to transition from strategic rationale to operational guidance, providing both the justification and mechanisms for activating the Framework at scale.

Methodology and Stakeholder Engagement

The Framework has been informed by a multi-disciplinary, evidence-based approach. Over a 20-month period, the project team undertook:

- Targeted consultations with over 200 stakeholders including Aboriginal and Torres Strait Islander producers, Traditional Owner groups, national advocacy bodies, government departments, government agencies, export advisors, and technology providers
- Workshops and roundtables with Indigenous agricultural producers to define the characteristics of Indigenous Agricultural Products
- A comprehensive legal and regulatory review of Indigenous Cultural and Intellectual Property (ICIP), provenance systems, and data standards
- Economic modelling of credential scenarios, cost-benefit profiles, and implementation levers
- A technical scan of global traceability tools and interoperability protocols.

This approach ensures the Framework is not only fit-for-purpose but grounded in the lived experience, aspirations, and expertise of Aboriginal and Torres Strait Islander communities and their partners.

The diversity and depth of stakeholder input into this Framework helps validate its design and underscore the national appetite for a First Nations-led approach to credentialing, supply chain inclusion, and market growth. These insights will continue to guide implementation, monitoring, and adaptive governance over time.

2. Design of the Indigenous Agricultural Product Framework

Chapter summary:

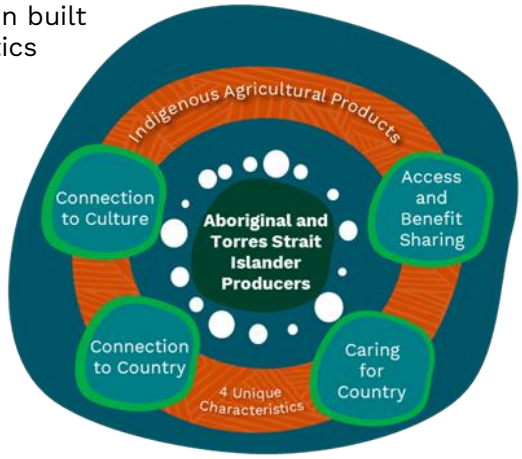
- Provides the proposed definition for 'Indigenous agricultural products' as developed through this project and endorsed by the sector
- Credential eligibility is based on Aboriginal and Torres Strait Islander ownership, connection to culture, connection to Country, caring for Country, and access and benefit-sharing
- The Framework design is anchored in the principles of cultural integrity, transparency, sustainability, and economic development.

Indigenous Agricultural Products working definition

For the purpose of this project, and tested through consultation with the sector, Indigenous agricultural products are defined as:

"The use of land, air, and waters by Aboriginal and Torres Strait Islander owned and operated organisations to produce primary products, while also caring for Country. Indigenous agricultural products, both cultivated and wild-harvested, create opportunities for access and benefit sharing with Aboriginal and Torres Strait Islander communities and reflect the cultural connection between the producers and the product."

The Indigenous Agricultural Product Framework has been built to recognise the following five foundational characteristics of an Indigenous agricultural product:



- Aboriginal and Torres Strait Islander business ownership
- connection to culture
- connection to Country
- caring for Country
- access and benefit sharing with community.

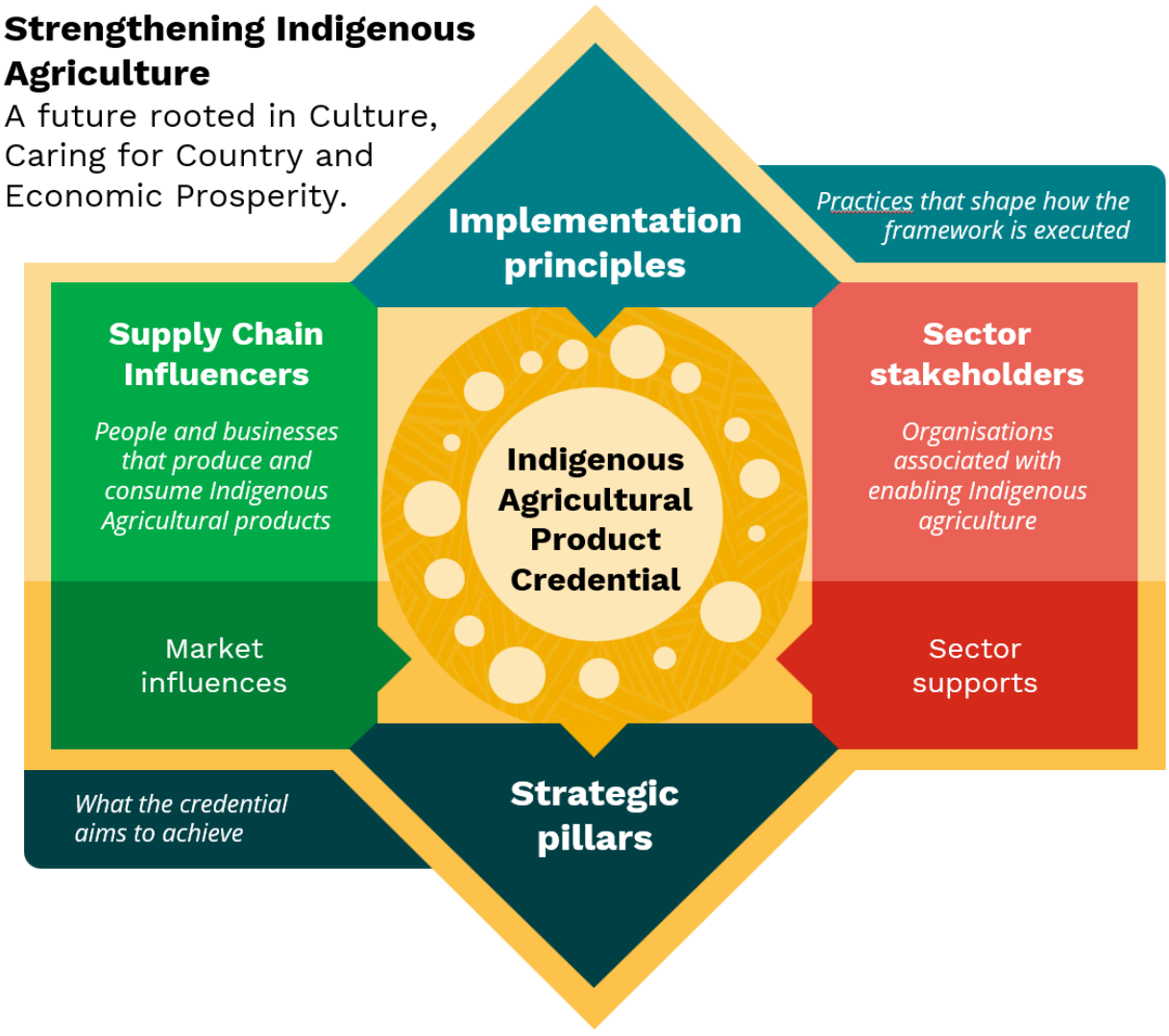
These characteristics have been validated through extensive consultation and provide the basis of the credentialing model. The Framework structure, outlined below, has the Credential Model at its centre – this is further expanded on in Chapter 3 of this report.

The Indigenous Agricultural Product Framework

The Framework has been drafted to guide the development and implementation of an Indigenous Agricultural Product credential. It reflects the culmination of extensive research and engagement through this project and is intended to be further tested and refined through additional engagement over time. Ownership of the Framework has not been determined, however project engagement made clear that First Nations Voices must be centric to its design, drive and implementation. An Aboriginal and Torres Strait Islander-led advisory committee should be established (refer Governance Structure recommendation – Chapter 4 below).

The figure (Figure 1) below outlines the key components of the Framework and the Indigenous Agricultural Product Credential, as previously captured in the *IAPF - Draft Framework Report* of this project. The definition of an Indigenous Agricultural Product, and the Framework itself, must be able to adapt and evolve over time through ongoing, meaningful consultation with Aboriginal and Torres Strait Islander peoples. This approach recognises that Indigenous businesses are dynamic and are representative of the diverse nature of Indigenous communities, languages, and regions. It also acknowledges that the agricultural sector, economic priorities, and community needs may shift over time. By embedding mechanisms for regular review and cultural input, the definition and Framework can remain relevant, inclusive, and reflective of the rich diversity and evolving nature of Aboriginal and Torres Strait Islander business practices.

Figure 1 - Indigenous Agricultural Product Framework Graphic



Framework Objectives and Vision

The Framework has been purpose-built to provide national consistency, cultural legitimacy, and commercial rigour in the recognition and promotion of Indigenous agricultural products. The Framework serves to support the delivery of a credential, and enables a platform for structural reform. It allows Aboriginal and Torres Strait Islander producers to define what it means for a product to be “Indigenous” on their terms, within a governance model that upholds cultural rights and enables long-term commercial value.

Implementation principles in developing the Framework

The design of the Framework is anchored in four interconnected principles, each of which play a critical role in ensuring its functionality, integrity, and scalability:

- **Cultural Integrity:** Ensure all practices respect and integrate Indigenous knowledges and cultural values.
- **Transparency:** Establish robust assurance practices that foster an open, verifiable system, guaranteeing the authenticity and origin of products.
- **Caring for Country:** Advocate for agricultural practices rooted in the ethos of caring for Country. Enhance community health, biodiversity, soil health, and water quality by adopting cultural management techniques that reflect traditional Indigenous values, fostering a symbiotic relationship with the environment.
- **Economic Development:** Strengthen economic self-determination and create conditions to support premium pricing for authenticated products and Aboriginal and Torres Strait Islander business ownership and employment opportunities.

Recognising Indigenous Cultural and Intellectual Property (ICIP)

A key element of the agricultural framework and credentialing system we are developing is the recognition and integration of Indigenous Cultural and Intellectual Property (ICIP), where applicable. ICIP is closely connected to many of the unique characteristics and practices outlined in the Framework, reflecting the knowledge and traditions of Indigenous producers. While current protections for ICIP are limited, it is important that our Framework seeks to recognise, respect, and trace ICIP where possible throughout the agricultural value chain. This approach not only supports Indigenous producers in maintaining control over their cultural assets and ensuring appropriate acknowledgment and benefits but also positions the Framework to adapt as protections evolve. Given ongoing international work by organisations such as the World Intellectual Property Organisation (WIPO) and national efforts by bodies like IP Australia, there is potential for stronger, more comprehensive safeguards in the future. By embedding ICIP recognition now (where possible), the Framework can better accommodate and align with these emerging protections, fostering more equitable participation and sustainability within the agricultural sector. **Foundational Decision Point - National Definition and Framework Structure:**

Endorse a nationally recognised definition of an Indigenous Agricultural Product that holistically incorporates the five validated characteristics: Aboriginal and Torres Strait Islander business ownership, connection to culture, connection to Country, Caring for Country, and benefit-sharing with community.

This definition should serve as a foundational standard across government, industry, and community sectors to ensure consistency, authenticity, and integrity in identifying and supporting Indigenous businesses. By embedding cultural, environmental, and community obligations into the definition, this approach will not only validate Indigenous ways of doing business but also promote equitable participation in economic opportunities, protect against cultural appropriation, and enhance the social and cultural contributions of Aboriginal and Torres Strait Islander businesses nationwide.

While the implementation principles provide the foundations for implementing the Framework and product credentials, actions have been aligned to the Frameworks Strategic Pillars, outlined in Chapter 5 of this report.

3. Business Models for a Sustainable Credentials System

Laying the Foundations for Enduring Value and System Integrity

The long-term success of the Framework hinges not only on the strength of its governance and technical systems, but also on the establishment of a sustainable, scalable business model. This model must ensure that the credentialing system is financially viable, culturally governed, and accessible to a diverse range of Aboriginal and Torres Strait Islander agricultural producers.

The proposed credential system must strike a careful balance: it must be rigorous enough to build trust and command price premiums in premium markets, yet flexible and inclusive enough to support early-stage and community-based enterprises. Achieving this requires a business model that delivers cultural protection, commercial value, and long-term operational sustainability.

Three credential delivery options were modelled to reflect a range of cost structures and impact outcomes:

1. **Indigenous Basic Verification** Model- where the credential would use existing third-party providers to certify that the producer was an Aboriginal and Torres Strait Islander person or organisation
2. **Indigenous Enhanced Assurance** Model- which involves manual audits to verify claims against each of the product's characteristics
3. **Indigenous Advanced Traceability** Model- which utilises advanced technology, such as blockchain, for rigorous verification and auditing processes.

The figure below (Figure 2) provides a high-level snapshot of the key attributes of each model developed for the credential system.

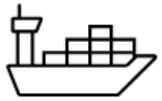
Figure 2 - Proposed business models for the Indigenous Agricultural Product Framework (IAPF)

Indigenous Basic Verification Model

- **Third-Party Verification**: Utilises existing third-party organisations (e.g., Supply Nation, ORIC, Kinaway) to confirm the Indigenous status of agricultural products.
- **Minimal Costs**: Designed to be a low-cost option, primarily covering fees for verification services and basic administrative overhead.
- **Government Support**: Initially supported by Government funding to cover start-up costs and ensure sustainability during the initial phase.
- **Simplified Process**: Provides a straightforward and efficient method for Indigenous businesses to verify their products, leveraging established verification systems.
- **Administrative Oversight and governance**: Managed by a private entity responsible for coordinating with third-party verifiers, maintaining records, and communicating results to suppliers and buyers.

Indigenous Enhanced Assurance Model

- **Manual Audits**: Conduct in-depth manual audits to verify that products are produced by Indigenous businesses, focusing on cultural connection, connection to Country, access and benefit sharing, and caring for Country.
- **Cultural Assurance**: Ensures production practices align with Indigenous values, providing a higher level of assurance compared to basic verification.
- **Moderate Cost**: Offers a more comprehensive verification option at a moderate cost, balancing thoroughness and affordability.
- **Government Support**: Initially supported by Government funding, transitioning to membership fees paid by suppliers and contributions from buyers.
- **Administrative Oversight and governance**: Managed by a private entity with dedicated audit teams, ensuring thorough and culturally informed verification processes.



Indigenous Advanced Traceability Model

- **Advanced Technology Integration**: Utilises cutting-edge technology such as blockchain, Internet of Things (IoT), and other emerging technologies for rigorous verification and auditing processes.
- **Comprehensive Audits**: Conducts thorough manual and technological audits to ensure product authenticity, quality, and adherence to Indigenous cultural practices.
- **High Credibility and Assurance**: Provides a "gold-standard" level of verification, significantly enhancing the credibility and market access of verified products.
- **Significant Government Support**: Sustained funding by the Government with support through industry, ensuring robust financial backing.
- **Administrative Oversight and governance**: Managed by a government agency or a newly established private entity with substantial investment, guided by a First Nations led advisory body to ensure alignment with Indigenous values and priorities.

Features of the proposed credential models						
	Government Support	Supplier Contributions	Government Support	Supplier Contributions	Government Support	Supplier Contributions
	Manual Audits	Technology Focus	Manual Audits	Technology Focus	Manual Audits	Technology Focus

Cost-Benefit Analysis and Economic Case

In collaboration with economic consulting firm Polis Partners, *yamagigu* conducted an indicative cost-benefit analysis (CBA) to evaluate the financial feasibility and long-term returns of the three credential delivery options. The full CBA report was developed as part of a prior Report (Export Maturity and Opportunity Assessment Report) – and has been attached in Appendix C. The options reflect varying degrees of system complexity and market readiness:

- **Basic Verification** (low-cost, minimal assurance model)
- **Enhanced Assurance** (balanced model with cultural, legal and market mechanisms)
- **Advanced Traceability** (tech-intensive model with high compliance and digital verification features)

The modelling shows that the **Enhanced Assurance model** provides the highest net benefit (NPV: $79.68 million; BCR: 3.6), achieving a strong return on investment while offering robust protections for cultural knowledge, verification of provenance, and broad-based economic benefit. It provides the optimal trade-off between upfront investment and long-term impact, with significant benefits in producer surplus, cultural heritage preservation, and consumer trust. The table below (Table 2) steps out a CBA against all three model options and their estimated cost, benefits, total Net results and BCR rating.

Table 2 - Economic results (5% discount rate, 30-year analysis, $2025 present value terms)

Results	Basic Verification	Enhanced Assurance	Advanced Traceability
Costs			
Establishment Costs	$3,989,213	$4,012,280	$7,811,015
Operational Costs	$12,073,002	$26,291,782	$17,590,350
Total Costs	$16,062,215	$30,304,062	$25,401,365
Benefits			
Producer surplus (price)	$31,093,394	$82,004,557	$33,058,022
Producer surplus (volume)	$7,773,349	$12,300,684	$3,305,802
Consumer surplus	$4,921,410	$9,374,113	$3,662,657
Environmental sustainability	$1,276,563	$ 2,020,055	$678,611
Traditional knowledge and cultural heritage preservation	$2,226,302	$4,288,881	$7,958,551
Total benefits	$47,291,018	$109,988,290	$48,663,643
Net results			
NPV Costs	$16,062,215	$30,304,062	$25,401,365
NPV Benefits	$47,291,017	$109,988,291	$48,663,644
NPV	**$31,228,803**	**$79,684,229**	**$23,262,279**
BCR	**2.9**	**3.6**	**1.9**

The Enhanced Assurance model, while the most expensive, delivers the highest net benefit and strongest cultural, environmental, and commercial returns. It reflects a high-trust, high-integrity model supported by robust verification, strong partnerships, and extensive producer and consumer engagement.

"The benefits of higher product assurance appear to outweigh the costs of higher assurance, producing a 'sweet spot' whereby producer buy-in is maximised to take advantage of it. After which there is likely to be diminishing returns." – Polis Partners[2]

GS1 costing has been incorporated into the assumptions underlying the development of the Enhanced Assurance model within this project. GS1 standards, which provide globally recognised frameworks for product identification and data management, represent a recurring cost to credential users. In Australia, these costs include annual membership fees that vary depending on the size of the business, starting from rates applicable to small businesses and increasing in line with organisational turnover3. These ongoing fees have been factored into the financial model to ensure the framework remains practical and sustainable for credential holders across varying scales of operation.

Foundational Decision Point - Credential Model Selection:

The business modelling confirm that the **Enhanced Assurance** model is the most effective and appropriate credential delivery mechanism for national rollout. It provides strong economic returns, reinforces cultural integrity, and aligns with the aspirations of Aboriginal and Torres Strait Islander producers and policy stakeholders alike.

NOTE: The cost estimates provided in this CBA are indicative only and based on current available data and assumptions. They are intended to guide decision-making and do not constitute definitive financial projections. Any implementation of a credential system should be preceded by a detailed feasibility assessment, with careful consideration of the financial and administrative impact on Indigenous producers and businesses. Particular attention from Government should be given to ensuring that the costs of compliance do not impose an undue burden on producers, especially those operating at smaller scales or with limited resources. Indigenous producers would also be encouraged to assess any indicative costs, as part of any potential credential uptake, in light of their own financial positions, operational capacities, and long-term business goals.

[2] Polis Partners (2025) *Indigenous Agricultural Products Credential Cost Benefit Analysis Report.*

3 GS1 Australia. (2025). *2025–2026 GS1 Australia Membership Fee Schedule*. Retrieved from https://assets.ctfassets.net/9uypwcnuzbqi/1ezqRousnAMaWtqgqtWheY/b45614de8858ae536e387956e9c9bcb7/gs1au-fees-individual-barcode-numbers-and-full-membership-2025.pdf

4. Proposed Governance and Ownership

Chapter summary:

- Governance model must ensure Indigenous self-determination, cultural legitimacy, and operational effectiveness.
- Three potential governance models assessed:
    - **Aboriginal and Torres Strait Islander-Led Authority/Consortium**: Full Indigenous control; strong cultural legitimacy; funding and capacity challenges
    - **Government-Facilitated Co-Governance**: Shared governance; government resources; risk of perceived loss of Indigenous control
    - **Industry Alliance/Cooperative**: Producer-driven; strong industry engagement; requires early external funding and capacity-building.
- **Further stakeholder consultation recommended:** engage with relevant stakeholders to ensure a First Nations led approach is used to select the appropriate governance structure.

Governance, Management, and Implementation Options for the Indigenous Agricultural Product Framework

The governance structure for the Framework must ensure Indigenous self-determination, cultural legitimacy, operational integrity, and long-term sustainability. This chapter presents three governance models for consideration, each offering different pathways for balancing these priorities. The selection of a governance model, as identified as a *foundational decision point,* determines how credentialing standards could be developed, maintained, and governed.

Each option encompasses both governance and operational oversight functions, including the development of credentialing standards, compliance monitoring, auditing, and credential promotion. The role of government, industry, and Indigenous stakeholders varies across the models.

Option A: Aboriginal and Torres Strait Islander-Led Authority or Consortium

This model places the majority governance control and operational authority with an Aboriginal and Torres Strait Islander-led entity. This could be a newly established authority, a formal consortium, or an expansion of an existing Indigenous-controlled body. The Indigenous-led authority would hold responsibility for credential development, review, compliance, auditing, and promotion, with cultural governance embedded into its structure.

Table 3 – Governance Option A - Comparative table

Option	Advantages	Challenges

Aboriginal and Torres Strait Islander-Led Authority or Consortium	• **Cultural Legitimacy:** This model provides stronger trust and credibility within Aboriginal and Torres Strait Islander communities, as decisions would be guided by cultural values and community input. • **Indigenous Data Sovereignty:** As the controlling entity is Aboriginal and Torres Strait Islander-led, there is a greater capacity to safeguard Indigenous data and cultural intellectual property. • **Inclusive Participation:** A governance board that represents diverse Aboriginal and Torres Strait Islander communities ensures broad inclusion, providing opportunities for regional, sectoral, and gender-balanced input.	• **Funding and Capacity Building:** While this model ensures cultural legitimacy, it may face challenges in securing long-term funding and ensuring adequate resources for administration due to its independent nature, including credential processes, compliance checks, and marketing efforts. • **Sustainability:** Building capacity within Aboriginal and Torres Strait Islander organisations is vital, as such a body will need to manage complex certification tasks, legal considerations, and stakeholder engagement. • **Expertise:** Ensuring the consortium has the appropriate governance skills and expertise to effectively manage and oversee the development, implementation, and maintenance of the credentialing system.

To mitigate these challenges, strong partnerships with external organisations (e.g. NFF, universities) and government support could be crucial for ensuring financial sustainability and resource capacity. This model could be structured as a not-for-profit entity or statutory authority to maintain accountability, with the potential for a mix of government funding and industry revenue.

Option B: Government-Facilitated, Co-Governance Model

In this model, governance and operational oversight are shared between the Australian Government and Aboriginal and Torres Strait Islander representatives. The Australian Government would provide administrative infrastructure, host the credential registry, and supply transitional funding, while Indigenous leaders would guide cultural and strategic decisions. Over time, control could transition towards majority or full Indigenous governance, including as outlined in Option A or C

Table 4 - Governance Option B - Comparative table

Option	Advantages	Challenges
Government-Facilitated, Co-Governance Model	• **Government Support:** Leveraging existing government infrastructure, resources, and funding increases the likelihood of long-term financial sustainability. Government-backed initiatives often attract more stable funding and have greater market credibility. • **Integration with Broader Policy:** The Framework could align more seamlessly with	• **Perceived Loss of Aboriginal and Torres Strait Islander Control:** There is a risk that Aboriginal and Torres Strait Islander communities may feel the Framework is over controlled by government, reducing trust and participation. Clear governance frameworks would be essential to ensure that Aboriginal and Torres Strait Islander leadership remains integral at all levels of decision-making.

	national agricultural traceability and trade initiatives, boosting its international credibility and enabling seamless integration with government programs.	• **Limited Cultural Authority:** While government involvement ensures operational stability, it may dilute the cultural legitimacy of the framework if not carefully managed. The government's role would need to be framed as supportive, with Aboriginal and Torres Strait Islander decision-makers holding key roles in all critical aspects of governance.

Option C: Industry Alliance or Cooperative Model

An industry-led cooperative composed of Aboriginal and Torres Strait Islander producers and businesses would manage the credentialing process. The cooperative would provide direct industry ownership while potentially partnering with government and philanthropic bodies for capacity-building and initial funding.

Table 5 - Governance Option C - Comparative table

Option	Advantages	Challenges
Industry Alliance or Cooperative Model	• **Strong Industry Buy-in:** An industry-led approach ensures deep engagement and commitment from Aboriginal and Torres Strait Islander producers, fostering a sense of ownership and responsiveness to on-the-ground needs. • **Peer Support:** Producers within the alliance would work together to meet credential requirements, sharing knowledge and best practices, which enhances the overall quality of Indigenous agricultural products. • **Self-Sufficiency:** This model could evolve to become financially self-sustaining, with revenue generated through membership fees and certification processes, reducing reliance on external funding.	• **Financial Sustainability:** Like Option A, this model faces challenges in securing initial funding for administrative systems and operations. It may require government or philanthropic grants in the early stages to establish infrastructure. • **Operational Complexity:** Running a national certification scheme is resource-intensive, requiring significant capacity in areas such as legal compliance, auditing, and brand management. Partnerships with other stakeholders, such as government agencies or research institutions, may be necessary to bolster capacity.

If pursued, the alliance could incorporate capacity-building strategies to strengthen its internal operations, including governance training, financial management, and technical support. While the model may initially require external funding, the aim would be for the cooperative to become financially self-sustaining over time.

Comparative Analysis of Governance Models

The following table presents a comparative analysis of the three governance, management, and implementation options under consideration for the Framework. While all models are designed to prioritise Indigenous leadership, cultural legitimacy, and long-term sustainability, they differ in their governance structures, operational responsibilities, financial models, and capacity requirements.

This comparison highlights the key considerations in determining the most appropriate governance structure. The analysis also identifies where transitional pathways, hybrid arrangements, or staged implementation approaches may be necessary to balance cultural authority, operational efficiency, and financial sustainability over time.

The following table provides a side-by-side comparison of the three models, summarising governance structures, operational focus, financial models, and long-term sustainability considerations.

Table 6 - Comparison of Governance, Management, and Implementation Options

Feature	Option A: Aboriginal and Torres Strait Islander-Led Authority or Consortium	Option B: Government-Facilitated, Co-Governance Model	Option C: Industry Alliance or Cooperative Model
Primary Governance Lead	Aboriginal and Torres Strait Islander authority or consortium, with Indigenous decision-making control.	Shared governance between government and Indigenous stakeholders, with government facilitation.	Industry-led cooperative of Indigenous producers and businesses.
Legal Structure	Statutory authority, not-for-profit entity, or formal Indigenous-led consortium.	Government-hosted registry with Indigenous advisory and governance boards.	Cooperative or membership-based peak body structure.
Key Participants	Broad Indigenous representation: peak bodies, communities, knowledge holders, sectoral and regional organisations.	Government agencies and Aboriginal and Torres Strait Islander advisory committees.	Individual Indigenous producers and businesses directly engaged in agriculture.
Focus of Operations	Governance, credentialing standards development, auditing, oversight, and cultural legitimacy.	Administrative management, system development, credential hosting, transitional governance support.	Commercial operations, credential management, peer support, and market promotion.
Role of Government	Limited operational role; possible funder, partner, or technical supporter.	Significant operational role; provides infrastructure, administrative capability, and early funding.	Limited operational role; potential funder or capacity-building partner in early stages.
Cultural Legitimacy	Strong cultural authority embedded structurally	May face perceived limitations on Indigenous autonomy	Cultural legitimacy derived from direct

Feature	Option A: Aboriginal and Torres Strait Islander-Led Authority or Consortium	Option B: Government-Facilitated, Co-Governance Model	Option C: Industry Alliance or Cooperative Model
	into governance arrangements.	if not carefully balanced.	ownership by Indigenous producers.
Financial Model	Primarily government funding, supplemented by potential industry levies, grants, and service fees.	Primarily government funded with long-term transition pathways to Indigenous ownership.	Member fees, credential income, commercial revenue, and potential initial government or philanthropic funding.
Capacity Requirements	High capacity needs across credentialling , legal, compliance, auditing, and stakeholder engagement.	Shared capacity model leveraging government infrastructure and systems.	High operational capacity required for commercial management, credential administration, and member services.
Sustainability Risks	Funding security and capacity development for complex governance functions.	Potential risk of long-term government dependency; need for cultural governance safeguards.	Initial financial viability and governance maturity of cooperative structure.
Long-Term Vision	Fully Indigenous-controlled independent credentialing authority.	Transitional government-supported model evolving to Indigenous-led governance over time.	Fully self-sustaining industry-led cooperative representing Indigenous producers nationally.

Foundational Decision Point – Governance Structure:

The selection of the most appropriate governance model for the Indigenous Agricultural Product Framework represents a critical strategic choice that will shape the long-term success, legitimacy, and sustainability of the framework. Each model presents distinct trade-offs in relation to cultural authority, operational complexity, financial sustainability, and stakeholder ownership. Whilst it will be a decision for government which option is most suitable, the recommendation made will need to follow best practice, and **engage and co-design with Indigenous producers**.

The decision must carefully balance the primacy of Indigenous self-determination with the operational requirements of establishing and maintaining a credible credentialing system that can meet domestic and international standards.

Ultimately, the preferred model must secure broad Indigenous support, reflect cultural governance principles, and deliver an operationally robust and financially sustainable credential that supports the growth of Indigenous agriculture in perpetuity.

Stakeholder Engagement Process to Inform Governance Model Selection

Selecting the most appropriate governance model for the Framework requires a carefully designed and transparent engagement process. This process must ensure that the final structure reflects the diverse interests, aspirations, and priorities of Aboriginal and Torres Strait Islander stakeholders, while also addressing operational feasibility and long-term sustainability.

The following engagement framework is recommended:

Principles Guiding the Engagement Process

- **Self-Determination**: Center Aboriginal and Torres Strait Islander leadership throughout the engagement process.
- **Inclusivity**: Ensure representation across regions, industries, gender, business scales, and cultural groups.
- **Transparency**: Clearly communicate objectives, processes, and how feedback will inform decisions.
- **Cultural Safety**: Design culturally safe engagement mechanisms and respect local protocols.
- **Iterative Consultation**: Recognise this as a multi-stage dialogue rather than a one-off consultation.

Stakeholder Mapping

Develop a comprehensive stakeholder map including:

- Indigenous agricultural producers (across sectors: bushfoods, pastoral, aquaculture, carbon, horticulture, etc.)
- Existing Indigenous peak bodies (e.g. First Nations Bushfood & Botanical Alliance, National Indigenous Australians Agency-funded entities)
- Regional and community-controlled organisations
- Knowledge holders, elders, and cultural governance representatives
- Indigenous Land and Sea Corporation
- National peak bodies (e.g. NFF, agribusiness councils)
- State and Territory Indigenous Govt Agencies
- Key government departments (DAFF, DFAT, Austrade, Treasury, etc.)
- Academic and research institutions with relevant expertise
- Private sector partners and buyers

Table 7 outlines a proposed sequence of engagement activities designed to capture diverse perspectives and inform the selection of an appropriate governance model.

Table 7 - Stakeholder engagement through implementation

Phase	Description	Outcome
Pre-Engagement Briefings	Prepare and circulate plain-language briefing papers summarising the governance options and decision points.	Stakeholders arrive informed and ready to contribute meaningfully.
Regional Roundtables	Host in-person and virtual regional consultations allowing for small group discussions. Use culturally appropriate facilitation.	Collect place-based feedback on preferences, risks, and priorities.

Phase	Description	Outcome
Peak Body & Industry Forums	Engage existing Indigenous peak bodies and industry groups to test operational feasibility and capacity expectations.	Understand industry appetite for leadership roles and commercial self-governance.
Targeted Government Consultations	Meet with relevant departments to clarify potential funding, support roles, and transitional pathways.	Confirm realistic levels of government involvement under each model.
Synthesis Workshops	Bring together representative groups to review engagement findings and test hybrid models or staged approaches.	Build consensus around preferred governance pathway and transitional structures.
Validation and Endorsement	Present draft recommendations to stakeholders for final validation prior to formal policy development.	Ensure legitimacy and buy-in before final model selection.

Key Decision Tests for Stakeholders

In approaching community or stakeholders through future engagement and consultations, the following questions below have been drafted to help guide and provide some considers:

- Which model most strongly reflects principles of self-determination and cultural authority?
- What operational capacity exists (or could be developed) to deliver the credential?
- What role should government play in funding, hosting, or transitioning?
- How should regional diversity and sector-specific needs be represented?
- What is the level of risk appetite for industry-led versus government-facilitated pathways?
- What safeguards are required to protect Indigenous data sovereignty and intellectual property?

Proposed Final Selection Process for Governance Formation
Following validation of the engagement outcomes, a structured nomination and selection process should be undertaken to establish the governance entity. This process could include:

- Development of clear selection criteria, co-designed with Indigenous stakeholders.
- An open nominations process facilitated through Indigenous peak bodies and community organisations.
- Assessment by an independent Indigenous-led selection panel.
- Formal endorsement of the appointed governance structure by participating stakeholders.

Independent Facilitation and Reporting

- Engage an independent, Indigenous-led facilitation team to conduct the engagement process.
- Prepare a public-facing **Stakeholder Engagement Outcomes Report** that transparently captures feedback and informs final governance decisions.

A well-structured engagement process will help identify the most appropriate governance model and also strengthen the legitimacy, trust, and long-term success of the Framework.

5. Framework Strategic Pillars

A set of strategic pillars, developed through the *IAPF – Draft Framework (Feb 2025)* report of this project, provides the foundation for the Framework's long-term impact, ensuring its adaptability across markets, technologies, and policy settings. These pillars guide the Framework's development and implementation, underpinning both system integrity and cultural legitimacy. They are:

- **Governance:** Collaborate with government agencies to streamline regulatory requirements, investigate best practice, and establish clear governance processes and guidelines for credentialing standards.
- **Technological Integration:** Implement technology for supply chain transparency, leverage software platforms for credential management, and invest in for real-time agricultural monitoring.
- **Monitoring, Evaluation and Continuous Improvement:** The Monitoring, Evaluation, and Continuous Improvement pillar ensures that the Framework remains responsive and adaptive, evolving in line with sector growth and needs through systematic data collection, ongoing reflection, and strategic refinement.
- **Market Access and Growth:** Develop marketing campaigns, facilitate trade partnerships, and create premium branding to highlight the unique value of Indigenous products.
- **Industry Coordination:** Emphasising the need for collaboration and unified efforts within the Indigenous agricultural sector. Through fostering a cohesive network that collectively addresses challenges, shares resources, and amplifies the impact of initiatives and supportive policies aimed at advancing Indigenous Agriculture.
- **Economic Empowerment:** Provide business development training, advocate for financial support mechanisms, and promote cooperative and collaborative business models for Aboriginal and Torres Strait Islander producers.
- **Community Engagement:** Establish robust partnerships with Indigenous communities through collaborative projects, inclusive decision-making, and capacity building via tailored educational programs and resources.

These Strategic Pillars translate the conceptual model into a practical blueprint for implementation ensuring alignment with community expectations, policy requirements, and the overarching vision for Indigenous-led agricultural development. The following table (table 8) provides an expansion of each pillar, outlining their objectives, key actions, and intended outcomes. This high-level summary provides a tangible pathway to implementing this Framework.

Table 8 - Implementation of the Frameworks Strategic Pillars

Strategic Pillar 1 – Governance						
Current state	Aspiration	Action	Impacts	Implementation Timeframes and Milestones		
Current governance structures are fragmented, lacking a unified framework to oversee Indigenous Agricultural Product credentialing.	Establish an Aboriginal and Torres Strait Islander-led oversight body responsible for developing and maintaining credentialing standards. This body will integrate cultural protocols, establish clear governance guidelines, and implement a robust auditing and verification system to ensure credential integrity.	1.1 Develop comprehensive credentialing guidelines in consultation with Aboriginal and Torres Strait Islander stakeholders. 1.2 Form the Aboriginal and Torres Strait Islander-led oversight body with representatives from Elders, industry experts, and government agencies. 1.3 Define and establish auditing and verification systems to validate claims of Aboriginal and Torres Strait Islander ownership and production authenticity. 1.4 Provide targeted training for board members on credentialing standards and conflict resolution.	• Cultural integrity is maintained through Aboriginal and Torres Strait Islander leadership. • Enables transparency in the implementation of the credentialing system. • Prevents black cladding and misrepresentation of Indigenous products. Creates opportunities for Aboriginal and Torres Strait Islander governance and leadership.	Phase 1 (0-24 Months):	Phase 2 (24-48 Months)	Phase 3 (48-60 Months):
				1-A Develop governance structure and credentialing guidelines.	**1-B** Establish oversight body and train members.	**1-C** Implement auditing systems and monitor outcomes.

Strategic Pillar 2 – Technological Integration						
Current state	Aspiration	Action	Impacts	Implementation Timeframes and Milestones		
				Phase 1 (0-24 Months):	Phase 2 (24-48 Months):	Phase 3 (48-60 Months):
Current agricultural systems are not configured to track characteristic of Indigenous Agricultural Products, resulting in limited transparency and consumer trust.	Implement technologies to create a transparent digital tracking system for credentialed products, ensuring authenticity and traceability.	**Industry Readiness:** 2.1 Full implementation of previously piloted traceability projects, with High-Readiness Producers to share proof points, generate learning, and demonstrate value to other producers. 2.2 Develop a Simple, Shared Data Template for Provenance to reduce inconsistencies, simplify integration across diverse platforms, and ensure that credentials are based on reliable, transparent, and comparable data. Co-design an offline-friendly or mobile-accessible form to help producers document core information relevant to the characteristics. **Data Standards:** 2.3 Define a Core Set of fields to validate Indigenous Agricultural Product characteristics. Introduce 5–7 key data	• Enhances product traceability and consumer confidence. • Aboriginal and Torres Strait Islander producers can begin capturing and sharing meaningful provenance data today. • Trust is built early through culturally governed design and consent mechanisms. • The sector is equipped to scale into premium markets over time without risking exclusion. • Prevents fraudulent claims and black cladding. • Streamlines data management and	**2-A** Needs assessment and infrastructure development.	**2-B** Pilot implement-ation with select producers.	**2-C** Full-scale implement-ation and data monitoring.

		points (e.g. Country, language group, business ownership, consent verification) that all producers can begin recording with minimal technical requirements. 2.4 Prioritise Consent and Ownership from Day One. Even at early stages, data collected must only be shared with permission and should remain owned by the community, reinforcing Indigenous data sovereignty principles from the beginning. **Technology Infrastructure:** 2.5 Conduct a needs assessment to identify technology requirements. 2.6 Leverage Simple, Mobile-First Tools. Adopt entry-level tools such as spreadsheet templates, QR code generators, or mobile apps that producers can use without high technical literacy. Choose tools that are adaptable to different regions and contexts. 2.7 Fund Essential Digital Uplift. Provide support for basic infrastructure (smartphones, connectivity, user training) so that producers can participate in traceability	reporting for Aboriginal and Torres Strait Islander producers.			

		with confidence and minimal friction. 2.8 Empower Regional Aggregators as Coordinators. Enable trusted Aboriginal and Torres Strait Islander organisations, cooperatives, or Land Councils to serve as shared service providers helping producers collect, manage, and verify traceability data on their behalf.				
Strategic Pillar 3 – Monitoring, Evaluation, and Continuous Improvement						
Current state	Aspiration	Action	Impacts	Implementation Timeframes and Milestones		
The absence of a structured monitoring and evaluation framework prevents the systematic tracking of credentialing outcomes and identification of areas for traceability improvement.	Develop a comprehensive monitoring and evaluation framework with KPIs focused on cultural, economic, and environmental outcomes.	3.1 In collaboration with Aboriginal and Torres Strait Islander stakeholders, develop a monitoring, evaluation and learning (MEL) framework with KPIs. 3.2 Implement traceability data collection systems for ongoing monitoring of KPIs. 3.3 Implement MEL framework, including to conduct regular reflecting learning and independent evaluations during early and later staged of implementation.	• Ensures the credentialing system remains adaptive and relevant. • Provides data-driven insights for policy refinement for traceability. • Strengthens stakeholder confidence in the credentialing framework.	Phase 1 (0-24 Months): **3-A** Develop MEL framework with KPIs and data collection systems.	Phase 2 (24-48 Months): **3-B** Implement MEL framework.	Phase 3 (48-60 Months): **3-C** Conduct regular reflecting learning and conduct interim (process) evaluation.

		3.4 Adjust policies and strategies based on feedback and data analysis.				
Strategic Pillar 4 – Market Access and Growth						
Current state	Aspiration	Action	Impacts	Implementation Timeframes and Milestones		
Aboriginal and Torres Strait Islander producers face barriers to accessing domestic and international markets due to lack of brand visibility and market connections.	Develop targeted marketing campaigns and facilitate trade partnerships to enhance the visibility of credentialed products.	4.1 DAFF to support producers through facilitating Market-Access negotiations to ensure import conditions are recognised. 4.2 Partner with export focused organisations (i.e. Austrade) to develop branding materials to promote credentialed products. 4.3 Establish trade partnerships with international retailers. 4.4 Provide export readiness training for Indigenous producers.	• Expands market reach and increases revenue for Aboriginal and Torres Strait Islander producers. • Establishes credentialed products as premium, culturally significant items. • Creates new economic opportunities for	Phase 1 (0-24 Months): **4-A** DAFF to assist in developing market access agreements alongsidebranding and marketing strategy.	Phase 2 (24-48 Months): **4-B** Identify critical trade partners and undertake a training needs assessment.	Phase 3 (48-60 Months): **4-C** Monitor market expansion and adjust strategies.

			Aboriginal and Torres Strait Islander businesses.			
Strategic Pillar 5 – Industry Coordination						
Current state	Aspiration	Action	Impacts	Implementation Timeframes and Milestones		
Lack of collaboration across the Indigenous agricultural sector limits resource sharing and knowledge exchange.	Establish collaborative networks to align industry efforts and promote the exchange of best practices with a focus on traceability.	5.1 Develop a network of Aboriginal and Torres Strait Islander producers (including existing exporters), industry bodies, and policymakers. 5.2 Facilitate regular workshops and forums to promote best practice exchange. 5.3 Implement funding mechanisms to support ongoing collaboration.	• Enhances sector cohesion and amplifies impact. • Facilitates resource sharing and capacity building. • Strengthens policy advocacy for Aboriginal and Torres Strait Islander producers.	Phase 1 (0-24 Months): **5-A** Network formation and stakeholder mapping.	Phase 2 (24-48 Months): **5-B** Policy development and socialisation.	Phase 3 (48-60 Months): **5-C** Resource mobilisation and community engagement.
Strategic Pillar 6 – Economic Empowerment						
Current state	Aspiration	Action	Impacts	Implementation Timeframes and Milestones		
Aboriginal and Torres Strait Islander	Implement financial support	6.1 Identify and support financial literacy programs for Aboriginal and Torres Strait Islander producers.	• Increases economic self-determination and	Phase 1 (0-24 Months):	Phase 2 (24-48 Months):	Phase 3 (48-60 Months):

producers lack access to financial resources and business development training to scale operations effectively.	programs and business development training to empower Aboriginal and Torres Strait Islander producers.	6.2 Review learnings from current export readiness projects for implications on future financial investment in this space. 6.3 Explore options for seed funding and low-interest loans for business expansion. 6.4 Implement mentorship programs to support business growth.	business resilience. • Expands Aboriginal and Torres Strait Islander agricultural enterprises. • Promotes sustainable economic growth in Aboriginal and Torres Strait Islander communities.	**6-A** Identify and support financial literacy and support programs.	**6-B** Promote available options for seed funding and launch mentorship initiatives.	**6-C** Monitor economic impact and scale initiatives.
Strategic Pillar 7 – Community Engagement						
Current state	Aspiration	Action	Impacts	Implementation Timeframes and Milestones		
Indigenous agricultural initiatives need genuine community ownership and alignment with cultural values, leading to limited long-term sustainability	Embed structured and sustained community engagement mechanisms within the credential system framework.	**Partnership Development:** 7.1 Conduct regular community consultations to gather feedback on system design and implementation. 7.2 Partner with existing local Aboriginal and Torres Strait Islander organisations for input into decision-making. 7.3 Full implementation of previously piloted traceability projects, working with Aboriginal and Torres Strait Islander communities to co-	• Embeds cultural authority and community ownership within the credential system. • Strengthens trust, transparency, and accountability between communities and credentialing bodies. • Ensures ongoing alignment with	Phase 1 (0-24 Months): **7-A** Conduct initial consultations and establish local advisory boards.	Phase 2 (24-48 Months): **7-B** Implement co-design projects with selected communities.	Phase 3 (48-60 Months): **7-C** Expand community governance structures and embed ongoing

and engagement.		design and implement credential system features. **Capacity Building:** 7.4 Refer producers to existing training programs in business, finance, and marketing, specifically designed for Aboriginal and Torres Strait Islander producers. 7.5 Provide access to mentorship programs and business growth resources. 7.6 Develop and distribute educational materials to improve awareness of credentialing benefits and processes.	cultural values, local priorities, and community expectations. • Builds enduring partnerships and governance capacity at the community level. • Creates pathways for intergenerational leadership, youth participation, and cultural knowledge transfer.			feedback mechanisms.

6. Technology and Data Standards to Enable Framework

Chapter summary:

- The Framework requires fit-for-purpose traceability technology to verify Indigenous provenance, cultural integrity, and sustainable production.
- Blockchain, IoT sensors, QR codes, and digital product passports enable real-time, tamper-proof supply chain transparency.
- Data systems will embed Indigenous cultural narratives and consent protocols, ensuring data sovereignty and ethical use.
- Metadata standards will capture cultural origin, FPIC, ownership, benefit-sharing, and environmental stewardship.
- International standards (GS1, ISO, W3C) will ensure interoperability, global market access, and system scalability.
- Verifiable credentials and QR-enabled consumer tools will support trust, brand integrity, and premium pricing.
- Indigenous Data Sovereignty underpins governance, ensuring communities control cultural and commercial information.

Traceability Technologies

The Framework defines traceability as a culturally grounded, values-driven system that extends beyond logistics to encompass the authentication of product origin, the protection of Indigenous rights, and the empowerment of Aboriginal and Torres Strait Islander producers through ethical data governance. It embeds cultural narratives, Free, Prior and Informed Consent (FPIC), and Indigenous data sovereignty at its core, ensuring that traceability functions both as a compliance mechanism as well as a tool for cultural storytelling, economic self-determination, and market differentiation. This approach aligns with the National Agricultural Traceability Strategy (2023–2033), which seeks to build a unified, secure, and interoperable traceability ecosystem across Australia. While the national strategy emphasises standards, scalability, and export readiness, the Framework complements it by embedding cultural protocols, ethical safeguards, and community co-design—positioning Indigenous producers as leaders in transparent, trusted, and values-aligned supply chains.

Technology Landscape Review

The global agricultural sector is undergoing rapid transformation driven by emerging technologies that enable end-to-end product traceability, supply chain transparency, and consumer trust. Among these, blockchain, Internet of Things (IoT) sensors, QR-enabled platforms, and digital product passports have become leading enablers of provenance assurance.

Blockchain, in particular, has emerged as a cornerstone of next-generation traceability frameworks. Its immutable, decentralised ledger technology provides a secure and transparent mechanism to record and verify transactions and product movements across the value chain. When combined with IoT devices such as GPS, temperature, humidity, and soil sensors, producers can generate real-time, tamper-proof records that validate origin, sustainability, and compliance claims.

International frameworks such as the European Union’s Digital Product Passport initiative, and GS1's global data standards, are converging toward interoperable, machine-readable systems. Domestically, Australia’s National Agricultural Traceability Strategy and emerging

state-based pilots (e.g. in Queensland and Victoria) are setting the foundation for integrated, standards-aligned approaches.

For Indigenous agricultural products, these technologies offer an opportunity to embed cultural narratives, demonstrate sustainability, and assert ownership rights through data-driven storytelling and verification.

Strategic Insight:
Design for future compatibility, not immediate complexity. Rather than implementing complex global standards too early, ensure the foundational data structure is simple today but can be mapped to GS1 or ISO frameworks later, when capacity is higher.

Use Cases for Aboriginal and Torres Strait Islander Enterprises

Traceability technologies present transformative potential for Aboriginal and Torres Strait Islander agricultural enterprises seeking to compete in high-value markets, differentiate their products, and safeguard cultural knowledge. Key use cases include:

- **Cultural Provenance Verification**
  Leveraging blockchain and metadata standards, Aboriginal and Torres Strait Islander producers can certify product origin, but also cultural context, linking products to language groups, stewardship practices, and connection to Country. QR codes can enable consumers to view this information directly on-pack, enhancing authenticity and premium positioning.
- **FPIC and ICIP Compliance Auditing**
  Traceability tools can be configured to ensure that Free, Prior and Informed Consent (FPIC) has been granted and documented for all cultural assets used in production or branding. Immutable audit trails provide assurance to government, retailers, and export regulators.
- **Real-Time Environmental Monitoring**
  IoT sensors embedded in farms or harvest zones can track inputs (e.g. fertilisers, water usage) and validate regenerative land management practices. These data points reinforce claims under sustainability, organic, or ethical trade credentials.
- **Data Sovereignty and Controlled Disclosure**
  Decentralised identity protocols (such as W3C Verifiable Credentials) allow Aboriginal and Torres Strait Islander communities to selectively share data while retaining ownership and governance. This approach aligns with Indigenous Data Sovereignty principles and mitigates risks of data misuse.
- **Export Certification and Logistics**
  Smart contracts and digital product passports can automate credentialling steps required for export, including health declarations, customs documentation, and country-of-origin verification. This streamlines logistics while reducing compliance overheads.

Strategic Insight:
The implementation of traceability technologies should not be purely transactional. They must be designed in partnership with Aboriginal and Torres Strait Islander communities to ensure cultural alignment, usability, and ethical data governance. With the right digital infrastructure and training, these tools can become vehicles of empowerment, cultural protection, and economic self-determination.

Data Standards, Labelling, and Interoperability Protocols

Establishing Foundational Infrastructure for Trust and Scalability

As Aboriginal and Torres Strait Islander agricultural producers enter premium domestic and export markets, data integrity and systems interoperability become critical enablers of product traceability, market confidence, and credential adoption. A coherent framework of metadata standards, labelling protocols, and interoperable data exchange mechanisms is essential to underpin the Framework and ensure its integration into global value chains.

To that end, the Framework must align with internationally recognised data and labelling frameworks while embedding culturally distinct identifiers and Indigenous data sovereignty principles.

Metadata, APIs, and Digital Product Identifiers

Metadata standards form the backbone of digital traceability systems enabling structured, machine-readable data on product origin, producer attributes, production methods, and credential status. For the Framework, metadata schemas should be co-designed with Aboriginal and Torres Strait Islander stakeholders to capture cultural and ethical dimensions such as:

- Cultural origin (e.g. language group, Country, kinship protocols)
- Verification of Free, Prior and Informed Consent (FPIC)
- Evidence of Aboriginal and Torres Strait Islander ownership and community benefit-sharing
- Environmental stewardship practices

Application Programming Interfaces (APIs) will be essential to enable seamless data exchange between Aboriginal and Torres Strait Islander platforms, supply chain actors, and external credentialing bodies. APIs should be RESTful, secured through authentication protocols, and designed to minimise data duplication and transfer risk.

Digital product identifiers such as Global Trade Item Numbers (GTINs) and Digital Link barcodes should be incorporated into product packaging to support universal product recognition, traceability scanning, and alignment with global buyer systems.

Standards Integration: GS1, ISO, W3C

To ensure global interoperability and future proofing, the Framework could adopt and extend key international standards, including:

- **GS1 Standards**
  GS1's global standards including barcodes and product identifiers such as the Global Trade Item Number (GTIN) and Electronic Product Code (EPC), as well as

data exchange frameworks such as Electronic Product Code Information Services (EPCIS) provide a trusted foundation for product labelling, logistics, inventory management, and supply chain traceability. Integration with GS1 standards enables alignment with major retailers, exporters, and regulatory systems.

- **ISO Standards**
  Relevant ISO frameworks (e.g. ISO 22005: Traceability in the feed and food chain; ISO 19115: Geographic metadata) provide structured guidance for data quality, traceability documentation, and food safety. Adoption will facilitate alignment with domestic regulatory bodies and global trade requirements.
- **W3C Verifiable Credentials (VCs)**
  W3C-compliant Verifiable Credentials offer decentralised, privacy-preserving formats to attest product claims such as cultural provenance, certification status, and FPIC compliance. These digital credentials can be embedded in product packaging (via QR codes or NFC tags) and verified by downstream users in real time.

Verifiable Credentials and Consumer Transparency Tools

To enhance consumer engagement and brand trust, the Framework could include digital transparency tools that communicate Indigenous provenance and impact in accessible, secure formats. Use cases include:

- **QR code-enabled storytelling**: Products can feature dynamic QR codes that reveal the story of the producer, cultural ties to Country, and environmental impact metrics.
- **Digital certificates**: Export partners and procurement agencies can access tamper-proof digital credentials that verify ownership, authenticity, and compliance.
- **Consumer dashboards**: Web-based interfaces can provide traceability journeys from farm to plate, including milestones such as cultural validation and benefit-sharing confirmation.

These tools serve both compliance and marketing functions, allowing Aboriginal and Torres Strait Islander producers to differentiate themselves through verified values-driven supply chains.

Strategic Insight:
Rather than ‘reinventing the wheel’, the Framework should plug into proven global standards, while overlaying uniquely Indigenous data fields and ethical safeguards. By doing so, the framework can deliver both cultural integrity and commercial relevance at scale.

Foundational Decision Point - Standards Alignment:

This initiative should **align with internationally recognised standards like GS1 and ISO** while embedding culturally distinct identifiers to respect Indigenous data sovereignty. By co-designing metadata standards with Indigenous stakeholders, the framework can address crucial aspects such as cultural origin, FPIC verification, ownership, community benefit-sharing, and environmental stewardship.

Key actions include implementing secure APIs for efficient data exchange, reducing redundancy and risks of duplication, and leveraging digital product identifiers such as GTINs and QR codes to ensure products are universally recognisable and traceable. Additionally, developing digital transparency tools like QR code-enabled storytelling and consumer dashboards will enhance brand trust and engagement by sharing authentic Indigenous narratives. By harmonising existing standards with Indigenous perspectives, the Framework achieves cultural integrity and commercial viability, fostering a resilient and inclusive market presence.

Embedding Cultural Integrity in Data Governance

As the Framework introduces new layers of credentialing, traceability, and digital infrastructure, it is imperative that data governance frameworks reflect and uphold the inherent rights of Aboriginal and Torres Strait Islander peoples to control their cultural and economic information. Indigenous Data Sovereignty is a foundational principle that ensures trust, integrity, and cultural legitimacy in how data is collected, stored, accessed, and applied across the value chain – aligning with Governments commitment to Priority Reform 4 under the Closing the Gap Agreement.

Internationally and domestically, Aboriginal and Torres Strait Islander communities have consistently asserted that data – particularly that which relates to Country, culture, knowledge systems, and commercial activity – must be governed according to their laws, values, and protocols. The Framework embeds this principle at its core.

Indigenous Data Sovereignty is not a compliance add-on, it is the governance backbone that ensures scale with integrity. Done right, the Framework positions Australia as a global leader in ethical, values-driven agrifood trade.

Strategic Insight:
Respect for Indigenous Data Sovereignty is both a cultural imperative and a risk and mitigation strategy. It builds trust, reduces legal exposure, and positions the Framework as a best-practice model for ethical digital ecosystems globally.

Foundational Decision Point - Data Governance:

To embed **Cultural Integrity in Data Governance** within the new Framework, we recommend prioritising **Indigenous Data Sovereignty**. This entails developing policies that allow Aboriginal and Torres Strait Islander communities to maintain control over their cultural and economic data. Implement traceability technologies and adhere to global data standards, ensuring culturally governed metadata frameworks are integrated into commercial systems. This approach not only facilitates interoperability

and safeguards Indigenous rights but also enhances market access and supports economic self-determination. This aligns with strategic goals of promoting transparency and integrity, fostering robust international partnerships, and reinforcing Australia's reputation in global markets.

7. Interoperability Across Indigenous Supply Chains

Chapter summary:

- Current traceability systems are fragmented, limiting Aboriginal and Torres Strait Islander participation in supply chains and export markets.
- Aboriginal and Torres Strait Islander producers face barriers including poor digital access, low trust, and lack of culturally appropriate systems.
- The Framework prioritises interoperability, cultural data layers, and consent-driven data sharing to enable participation.
- Traceability must capture cultural provenance, not just commercial data, to reflect Indigenous values and protect IP.
- Flexible, scalable technology solutions will accommodate diverse producer readiness levels and regional contexts.
- Coordination with DAFF, DFAT, and global standards bodies ensures policy alignment, export readiness, and international credibility.
- Interoperability is critical to position Australia as a leader in ethical, Indigenous-led global agriculture.

Current State and Challenges

Fragmented Systems, Trust Gaps, and Access Barriers

The current state of traceability and data infrastructure across Indigenous agricultural supply chains is marked by fragmentation, asymmetry, and underinvestment. While isolated digital systems and pilot programs exist, there is no unified or culturally aligned framework that connects Aboriginal and Torres Strait Islander producers, processors, retailers, and end markets through a trusted, interoperable data environment.

Three systemic challenges stand out:

- **Data Fragmentation**: Existing traceability systems used across Australia's agricultural sector are siloed, proprietary, and inconsistent. Most Aboriginal and Torres Strait Islander producers operate without access to standardised traceability platforms, relying instead on manual or ad hoc processes. This lack of interoperability inhibits efficient data flow, reduces visibility across the supply chain, and complicates participation in credentialling and export pathways.
- **Trust Gaps**: Historical exclusion from mainstream agricultural systems and instances of cultural misappropriation have led to low trust in external data collection, credentialing schemes, and technology partners. Aboriginal and Torres Strait Islander communities remain concerned about data misuse, loss of control, and the commercialisation of cultural knowledge without appropriate consent or benefit sharing.
- **Access Barriers**: Many Aboriginal and Torres Strait Islander producers, particularly those in remote or regional locations, face significant barriers to participating in digital traceability systems. These include unreliable connectivity, lack of fit-for-purpose tools, limited digital literacy, and the absence of culturally appropriate onboarding and support.

Without direct investment in culturally anchored, interoperable solutions, Aboriginal and Torres Strait Islander producers risk being left behind in the growing global shift toward digital provenance, ESG-aligned sourcing, and consumer transparency.

Key Insights from Traceability and Data Consultations

Extensive consultations with Aboriginal and Torres Strait Islander producers, legal experts, supply chain participants, and technology providers surfaced critical insights that must inform the design of the Framework:

- **Traceability is More Than Compliance**
  For Aboriginal and Torres Strait Islander producers, traceability must reflect more than transactional data, and should capture connection to Country, cultural knowledge, and ethical custodianship. Any system that fails to reflect these values risks rejection by Aboriginal and Torres Strait Islander users.
- **One Size Does Not Fit All**
  Producers operate across a spectrum of readiness, from digitally enabled agribusinesses to small community-based harvesters. Traceability solutions must be scalable and adaptable to suit local contexts and varying levels of technical capacity.
- **Demand for Control and Consent Mechanisms**
  Communities want tools that allow them to retain control over how data is shared, with whom, and under what conditions. Consent must be ongoing, revocable, and logged, particularly for data linked to cultural knowledge or land use.
- **Opportunity for a 'Cultural Layer'**
  Stakeholders expressed a strong appetite for the Framework to include a 'cultural data layer', allowing Aboriginal and Torres Strait Islander producers to verify and embed their cultural and ethical credentials alongside standard supply chain data. This would offer differentiation in premium markets and support cultural storytelling.
- **Urgency for Interoperability**
  Fragmented systems create friction, duplication, and costs. Aboriginal and Torres Strait Islander producers seek solutions that connect seamlessly with existing platforms used by regulators, retailers, and logistics providers without compromising Aboriginal and Torres Strait Islander data governance.

Strategic Insight:
The status quo is no longer fit-for-purpose. To enable Aboriginal and Torres Strait Islander-led participation in high-value, transparent supply chains, we must shift from fragmented pilots to a scalable, interoperable infrastructure co-designed with communities, underpinned by trust, and enabled by ethical technology.

Alignment with DAFF, DFAT, and International Frameworks

Inter-agency alignment will be critical to ensure policy coherence, reduce regulatory duplication, and embed the Framework into mainstream agricultural, trade, and consumer protection systems. To assist with the alignment of inter-agency policy and programs, a Inter-Agency Task Force could be established – and could focus on the key areas below:

Recommended Coordination Mechanisms:

- **Department of Agriculture, Fisheries and Forestry (DAFF)**
  - Integrate the Framework into national biosecurity, export, and agricultural data systems
  - Align with the National Agricultural Traceability Strategy and its data interoperability initiatives

    - Continue to promote DAFF's existing role in navigating and negotiating complex market access requirements, standards, and regulations on behalf of agricultural producers and businesses (Indigenous and non-Indigenous)
    - Embed the Framework within existing provenance and sustainable agriculture programs.
- **Department of Foreign Affairs and Trade (DFAT)**
    - Promote the Framework credential through Australia's Nation Brand and agricultural diplomacy
    - Support market entry and awareness through Austrade-led campaigns and trade missions
    - Leverage Australia's Indigenous Diplomacy Agenda to promote the credential internationally.
- IP Australia
    - Align with ongoing work to support the protection of Indigenous Cultural and Intellectual Property (ICIP) – through the World Intellectual Property Organisation (WIPO) systems.
- **International Standards Bodies (e.g. ISO, W3C, GS1)**
    - Ensure ongoing alignment of the Framework data and credentialing standards with global frameworks to support international recognition and interoperability.

Strategic Insight:
Intergovernmental coordination is core to the system integrity and commercial viability of the Framework. The opportunity exists to position Australia as a global leader in ethical, Aboriginal and Torres Strait Islander-led agricultural branding backed by world-class governance, legal protection, and digital infrastructure.

Foundational Decision Point - Cross-Government Coordination:

To align inter-agency efforts and enhance policy coherence, we recommend establishing a dedicated **Inter-Agency Task Force** to synchronise the Framework with national and international systems. First, DAFF should integrate the Framework into domestic policies by streamlining processes to eliminate regulatory duplication, ensuring seamless incorporation into agricultural, trade, and consumer protection sectors. Second, DFAT should actively promote the Framework via Australia's Nation Brand and trade initiatives, highlighting Indigenous-led agricultural products as key export offerings. Third, ensure alignment with international standards bodies to secure global recognition and credibility. This task force will drive coordination, leveraging Australia's potential as a leader in ethical, Aboriginal and Torres Strait Islander-led agricultural branding, positioning these products prominently in global markets.

8. Enabling Growth and Uplifting Traceability Maturity

Chapter summary:

- Aboriginal and Torres Strait Islander producers possess deep cultural knowledge but face capability gaps in scale, digital literacy, business management, and market access
- Readiness varies widely across the sector, from export-ready enterprises to early-stage, community-based producers
- The Framework proposes a national uplift agenda targeting sector skills, infrastructure, funding, and community-led support.
- Training will build capacity in business management, financial literacy, ESG compliance, traceability, and data governance.
- Digital enablement packages will provide affordable tools, connectivity, and onboarding support, especially in remote areas.
- Shared infrastructure hubs will improve processing, logistics, and export readiness for Aboriginal and Torres Strait Islander producers.
- Community-led business hubs will deliver long-term, culturally aligned support, mentoring, and governance guidance.

Industry Capability and Gaps

Readiness of Aboriginal and Torres Strait Islander Producers

Aboriginal and Torres Strait Islander participation in Australian agriculture is characterised by both deep-rooted cultural knowledge and growing commercial ambition. Across pastoral operations, bushfoods, aquaculture, regenerative agriculture, and native grains, Aboriginal and Torres Strait Islander producers are actively managing land, producing food and fibre, and maintaining cultural and ecological systems of care. However, capability levels across the sector are highly varied.

Consultations revealed that while a number of Aboriginal and Torres Strait Islander-led enterprises are export-ready and already engaged with advanced supply chain systems, the majority of producers remain in the early stages of commercialisation and digital adoption. Key differentiators of readiness include:

- **Scale and Maturity**: Enterprises range from small, community-based harvesters and family-owned farms to vertically integrated agribusinesses. Smaller producers often lack the scale to absorb compliance costs or invest in credentialing infrastructure
- **Digital Literacy and Infrastructure**: Significant disparities exist in digital capacity and connectivity, particularly in remote regions. This constrains access to traceability systems, data tools, and credentialing processes essential to market participation
- **Business Management Capability**: While cultural and land stewardship expertise is strong, many enterprises require additional support in core business functions such as financial management, regulatory compliance, strategic planning, and export readiness
- **Workforce and Succession Planning**: Many enterprises are operating with limited workforce depth and are vulnerable to key-person dependency. Investment in training, workforce development, and youth engagement is required to ensure long-term sustainability.

These capability gaps reflect a lack of consistent, fit-for-purpose support and structural inclusion in agricultural development programs.

Unlocking the Full Potential of Indigenous Agribusiness

Realising the full impact of the Framework requires sustained investment in the people, enterprises, and enabling systems that comprise the Indigenous agricultural sector. The below uplift agenda has been informed through consultation and research conducted during the development of the Framework and strategic pillars although it is beyond the scope of the Framework and is focused on supporting the sector more broadly.

To close these structural gaps, we have outlined in the table below (Table 9) a national, coordinated industry uplift agenda focused on three priority domains: Sector Skills Development, Digital Tools, and Funding Pathways, Infrastructure and Supply Chain Support and Community-Led initiatives.

Table 9 - Proposed Industry Uplift Agenda

Priority Domain	Highlighted Need	Uplift Requirement
Sector Skills Development, Digital Tools, and Funding Pathways	Build the technical, commercial, and digital competencies required for Aboriginal and Torres Strait Islander producers to participate in traceability, credentialing, and export markets.	**Targeted Sector Skills Programs** Develop modular, culturally tailored training in business management, financial literacy, supply chain traceability, ESG compliance, and Indigenous data governance. Training should be co-delivered by Aboriginal and Torres Strait Islander providers and embedded within existing community-based initiatives. **Digital Enablement Packages** Provide technology bundles (e.g. smartphones, QR labelling equipment, connectivity subsidies) alongside onboarding support to enable digital participation, particularly in remote regions. **Capital Access Models** Establish dedicated funding streams for credential system implementation and digital infrastructure investment. This could include: • Seed grants for first-time adopters • Blended finance or concessional loans to support system-wide digital integration • Incentive-based funding tied to credential uptake and data quality.
Infrastructure and Supply Chain Support	Address physical and digital infrastructure gaps that limit the ability of Aboriginal and	**Invest in Shared Facilities** Support the development of regional hubs and cooperatively owned infrastructure for processing, packing,

	Torres Strait Islander producers to access high-value markets and participate in complex supply chains.	cold storage, and distribution to reduce barriers to market entry. **Supply Chain Integration Pathways** Establish partnerships with major buyers, logistics providers, and credential bodies to embed Aboriginal and Torres Strait Islander producers into existing supply chains, reducing duplication and credential friction. **Data Infrastructure and Connectivity** Expand access to high-speed connectivity in production zones and provide funding for the development of interoperable, culturally governed data platforms (as outlined in Chapter 6). **Export Readiness Infrastructure** Fund diagnostic assessments, export planning, and product certification services to support international market access for credentialed Aboriginal and Torres Strait Islander products.
Community-Led initiatives	Transition from transactional service delivery to long-term, trust-based support systems that are community-led and culturally aligned.	**Local Business Support Hubs** Leverage regional "one-stop shops" for Aboriginal and Torres Strait Islander agribusiness support offering advisory services, credentialing assistance, and digital upskilling tailored to local conditions and aspirations. **Cultural Mentorship and Governance** Create formal pathways for Elders and cultural knowledge holders to provide ongoing advice on governance, brand integrity, and custodianship of cultural narratives within product systems. **Monitoring and Adaptive Support** Establish feedback loops to monitor outcomes, identify systemic constraints, and continuously refine support offerings based on enterprise and community needs.

Foundational Decision Point - Industry Capability Uplift:

To effectively enhance the readiness of Aboriginal and Torres Strait Islander producers in Australian agriculture, we recommend a comprehensive uplift agenda focusing on four key areas: **Sector Skills Development, Digital Tools, and Funding Pathways, Infrastructure and Supply Chain Support, and Community-led initiatives**. First, develop targeted training programs to bolster essential agricultural skills, ensuring these are culturally sensitive and accessible. Second, facilitate digital literacy workshops and

provide technology grants to improve digital adoption. Third, invest in infrastructure support, prioritising access to essential resources like water and transport networks. Finally, empower community-led initiatives by funding local leadership and collaboration projects that reflect the unique needs and aspirations of Indigenous producers. This coordinated approach will bridge capability gaps and drive sustainable industry growth.

9. Roadmap for Establishing the Indigenous Agricultural Product Framework

Roadmap and strategic implementation plan

Building a Pathway from Vision to Impact

This chapter outlines the practical roadmap for implementation, alongside a robust monitoring and evaluation (MEL) framework to ensure the Framework remains effective, accountable, and aligned with its vision of Aboriginal and Torres Strait Islander-led agricultural empowerment.

Roadmap - Key Milestones and Sequencing

A phased implementation model enables orderly delivery, risk mitigation, and stakeholder mobilisation. The table below (table 10) steps out a 3 Phase approach across a 5 year (60 months) implementation timeframe for the establishment of the Framework. This is a consolidation of the Implementation Timeframes and Milestones associated with each of the strategic pillars outlined in chapter 5.

Table 10 - Roadmap Implementation Phases and Key Milestones

Phase	Timeline	Key Milestones
Phase 1: Establish Foundations	0–24 months	**1A -** Develop governance structure and credentialing guidelines **2A -** Needs assessment and infrastructure development **3A -** Develop MEL framework with KPIs and data collection systems **4A -** DAFF to assist in developing market access agreements alongside branding and marketing strategy. **5A -** Network formation and stakeholder mapping **6A -** Identify and support financial literacy and support programs **7A -** Conduct initial consultations and establish local advisory boards.
Phase 2: System Activation	24-48 months	**1B -** Establish oversight body and train members **2B -** Pilot implementation with select producers **3B -** Implement MEL framework **4B -** Identify critical trade partners and undertake a training needs assessment **5B -** Policy development and socialisation

Phase	Timeline	Key Milestones
		6B - Promote available options for seed funding and launch mentorship initiatives **7B -** Implement co-design projects with selected communities.
Phase 3: Scale and Sustain	48-60 months	**1C -** Implement auditing systems and monitor outcomes **2C -** Full-scale implementation and data monitoring **3C -** Conduct regular reflecting learning and conduct interim (process) evaluation **4C -** Monitor market expansion and adjust strategies **5C -** Resource mobilisation and community engagement **6C -** Monitor economic impact and scale initiatives **7C -** Expand community governance structures and embed ongoing feedback mechanisms.

The high-level key milestones outlined above provide a foundational roadmap for the staged implementation of the Framework. However, to effectively guide practical delivery and ensure fidelity to the vision set out by First Nations stakeholders, each phase must be supported by a deeper operational logic. This may include future work around developing a more detailed implementation plan, to accompany this Roadmap and provide added guidance to the actions required, key stakeholders, accountability, timeline, risks and budge. The Roadmap visual has been provided (Appendix A) to support the Roadmap and Implementation Plan above.

Next steps

The development of the Framework marks a significant milestone in the future of Aboriginal and Torres Strait Islander primary production, one grounded in community leadership, cultural integrity, and economic inclusion. This final report has consolidated a two-year journey of listening, research, and co-design. It reflects the voices of hundreds of Aboriginal and Torres Strait Islander producers, policy makers, legal experts, and market participants who share a common aspiration: to see Indigenous products recognised, protected, and valued on their own terms.

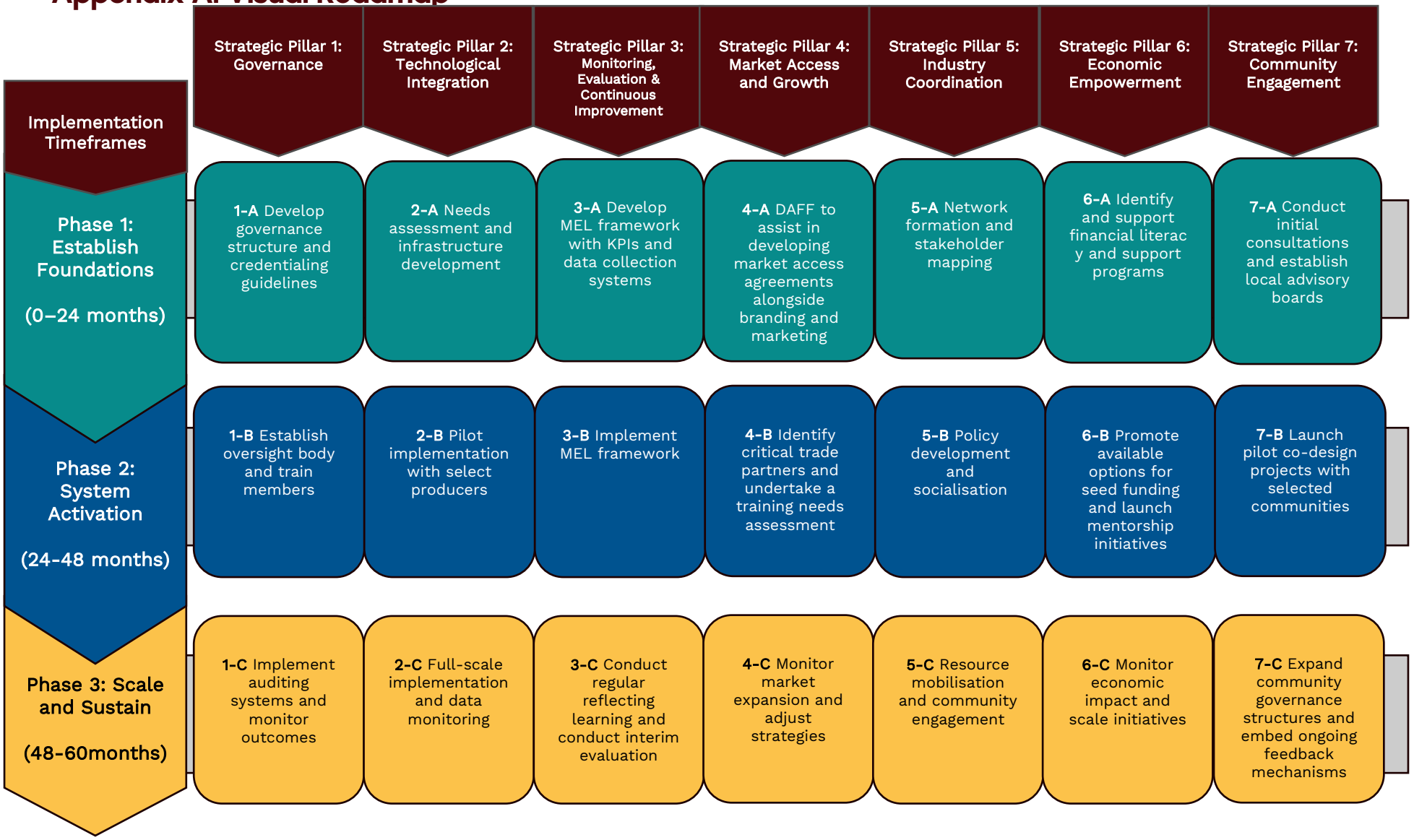
But a framework is only as powerful as its implementation. The next phase of this work includes endorsement by government, ongoing consultation with Aboriginal and Torres Strait Islander producers and communities and piloting the implementation of the Framework. It must ensure that the values centre around culture, respect, community, and care for Country are upheld in all activities going forward.

Realising the potential of the Framework requires cross-sector commitment. Government must play a catalytic role in resourcing and policy alignment. Industry must create space for Indigenous supply chains and elevate credentialed products in both domestic and export markets. Critically, First Nations producers must remain at the centre, as the custodians, creators, and storytellers behind the credential.

The next steps are therefore not a technical exercise. They are a continuation of cultural sovereignty. A pathway to economic self-determination. A platform for intergenerational opportunity.

This report provides the evidence, the structure, and the strategy. What comes next is a shared responsibility to build a system that is not only functional, but transformative.

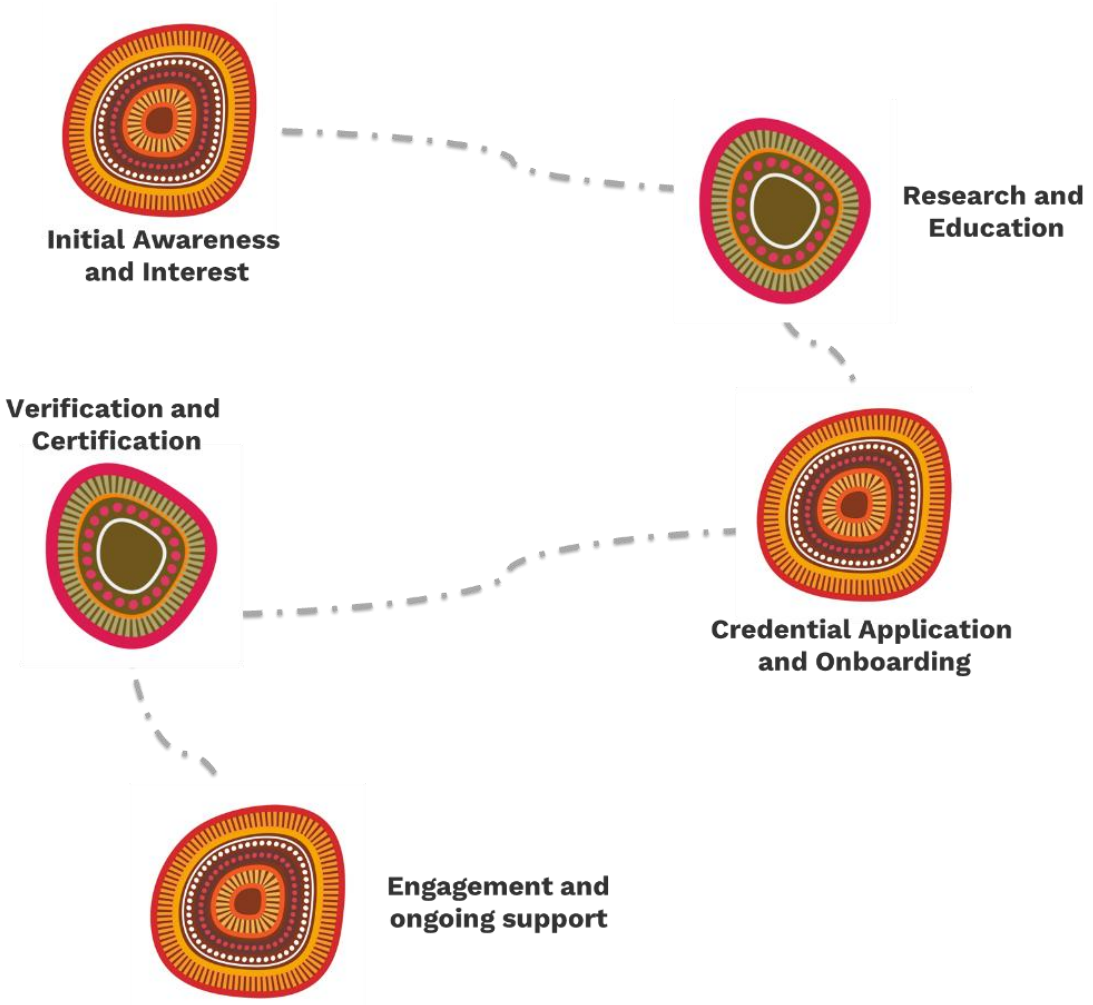
Appendix A: Visual Roadmap



Appendix B: Indigenous Producer - User Journey

Whilst this project has focused on the development of an Indigenous Agricultural Product Framework credential, there is an understanding it would be useful for both government and the agricultural sector to inform see a practical use application of accessing any future this credential system(s). The five steps outlined below shows a "user journey" – a high level, 5 step process for an Aboriginal and Torres Strait Islander Agricultural producer to engage with and adopt the IAP Credential. As the credential is yet to be established, the following would be a hypothetical approach, with further work required to fully establish a credential system and integrate with the agricultural sector.

Figure 3 - Proposed Aboriginal and Torres Strait Islander Producer User Journey



1. **Initial Awareness and Interest:** Producers learn about the credential system through a range of engagement points (advertisement, community workshops or word-of-mouth within agricultural networks etc). Here, they seek to understand how credentialing aligns with their values, how it ensures cultural integrity and the potential economic benefits it may provide. It's crucial they feel that their traditional knowledge is respected and protected – whilst also supporting them as a business (small/medium enterprise).
2. **Research and Education:** Producers explore the requirements and benefits of the credential system. They evaluate whether the system supports their agricultural practices and if it provides tangible benefits such as better market access or

premium pricing. They may consult with Elders or community leaders to gauge cultural appropriateness.

3. **Credential Application and Onboarding:** After deciding to participate, producers submit an application detailing their practices. The onboarding process should be straightforward, with support offered in a culturally sensitive manner. This could include assistance in navigating digital platforms or and requirements for ongoing participation in the credential system.
4. **Verification and Certification:** An assessment of their eligibility, ensuring alignment with the credential system's criteria (Identification of an Aboriginal and Torres Strait Islander business, caring for Country, connection to culture, connection to country and access and benefits sharing). This stage should involve respectful dialogue between the producers and the credential certifier, recognising a level of Indigenous cultural governance will be required – noting traditional knowledge and deep cultural understanding is a valuable component of the credential.
5. **Engagement and ongoing support:** Once certified, producers receive ongoing support and as well as providing opportunities for feedback. Support may include access or pathways to new markets (national and international export), business development support or networking opportunities with other Aboriginal and Torres Strait Islander producers. Feedback might include sharing success stories or participating in forums to discuss improvements to the system, ensuring it remains inclusive, First Nations-led and beneficial to all parties involved. From this engagement, producers would hope to see benefits (including a potential price premium increase, greater market share/access and business support).

Appendix C: Polis Partners – Indigenous Agricultural Products Credential – Economics Report

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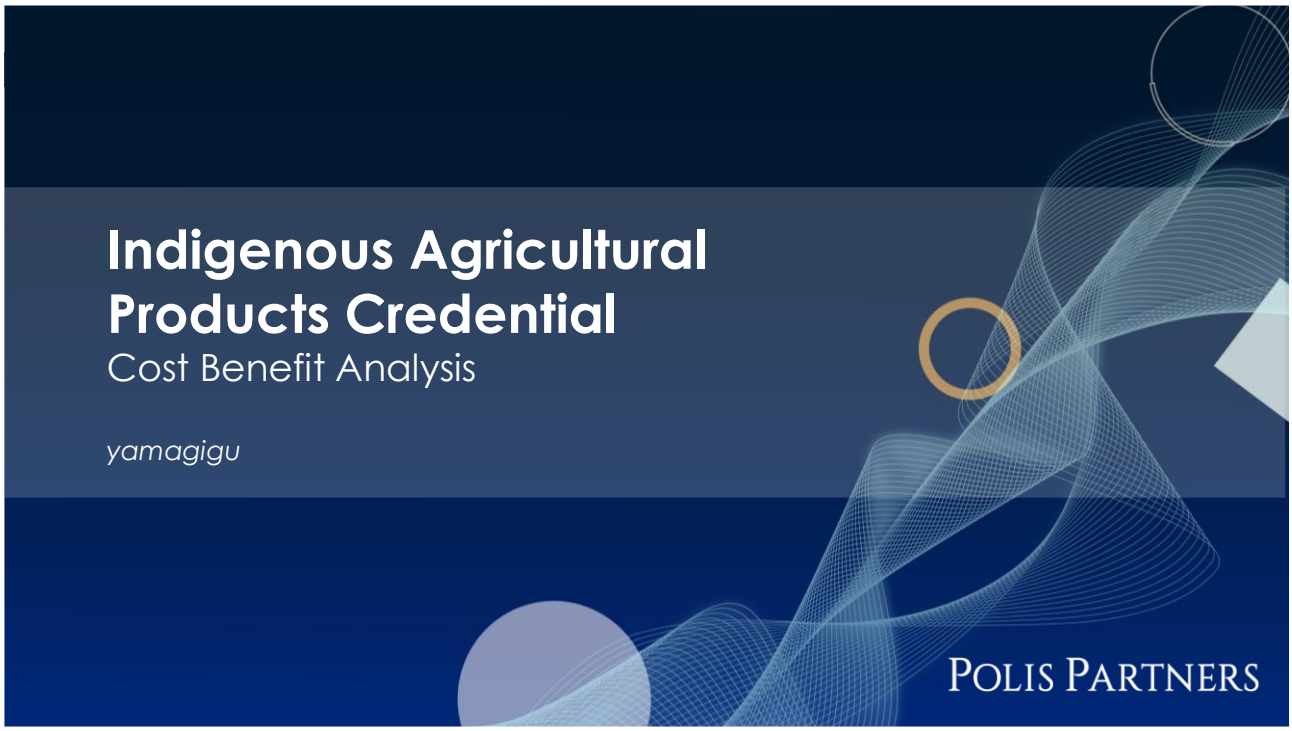


Indigenous Agricultural Products Credential

Cost Benefit Analysis

yamagigu

POLIS PARTNERS

Project Overview

An Indigenous Agricultural Products Credential provides a mechanism for verifying the authenticity and provenance of Indigenous agricultural products – helping to address unmet demand in the market and generating economic benefits.

The Indigenous Agricultural Product Framework (IAPF) project, a collaboration of the Indigenous Land and Sea Corporation (ILSC), the Department of Agriculture, Fisheries and Forestry (DAFF), and the National Farmers Federation (NFF), aims to establish a credential system for Indigenous Agricultural Products. Recognising the multifaceted benefits of Indigenous agriculture, the initiative seeks to verify the authenticity of these products, enhancing economic self-determination for Aboriginal and Torres Strait Islander communities through premiums on verified products, business ownership and employment opportunities.

Indigenous agricultural products are in high demand and can attract premium prices due to their cultural roots and provenance. For Indigenous producers, this creates opportunities for stronger financial returns. Importantly, the cultivation and sale of these products also supports community cohesion, increases intergenerational knowledge sharing, and enhance local economic participation.

Introducing a credential system would strengthen trust in the authenticity of Indigenous products. By embedding clear verification and traceability processes, such a system can protect cultural legitimacy and provide assurance that products originate from Indigenous producers. This visibility helps address consumer skepticism and reinforces the integrity of the supply chain.

Three options have been proposed for the credential - basic verification, enhanced assurance, and advanced traceability. Each option contains differing verification techniques, cost, timing and potential market coverage and economic benefits.

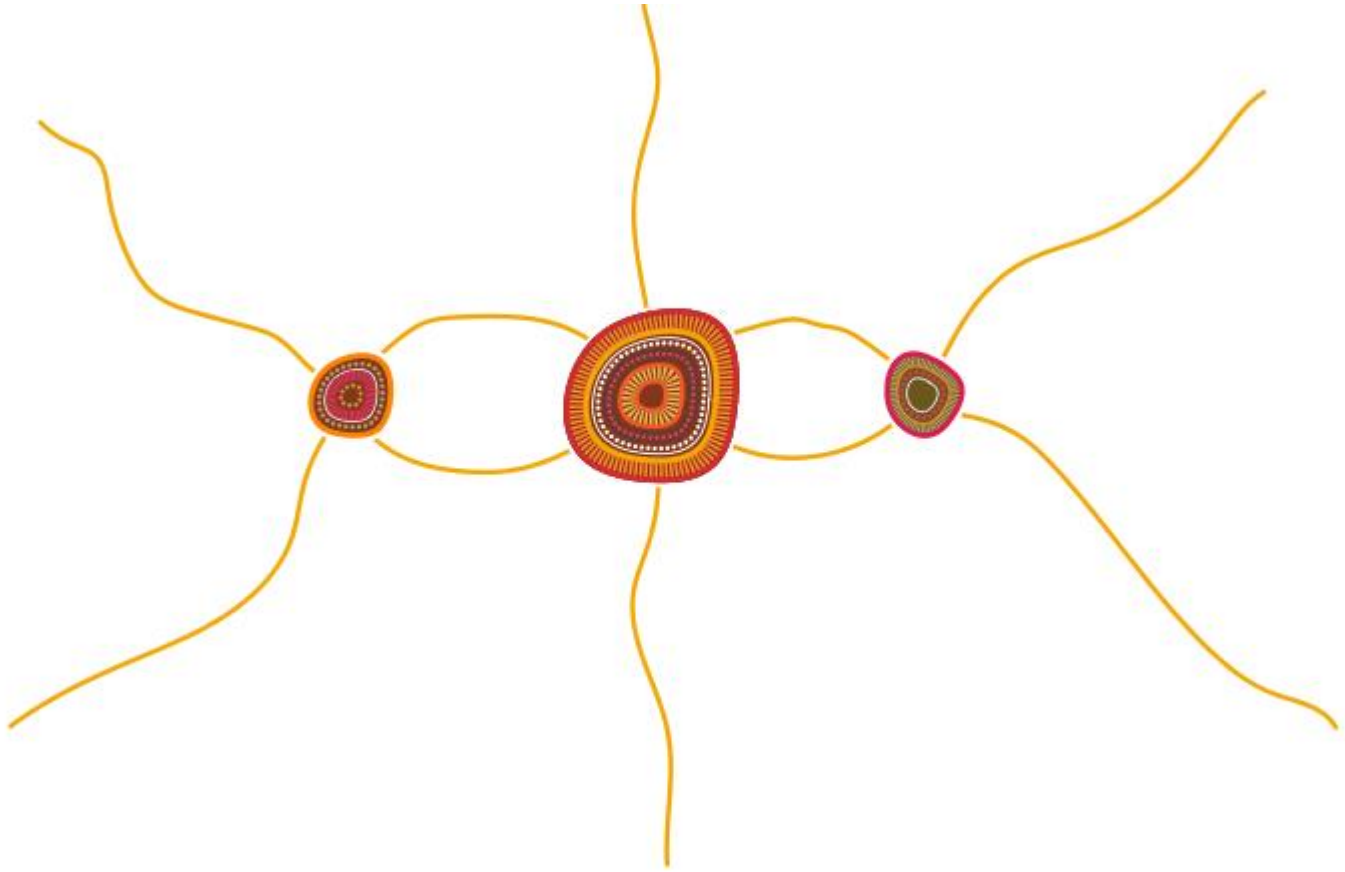
Yamagigu have engaged Polis Partners to undertake an economic cost-benefit analysis (CBA) that quantifies and compares the economic viability of each of the three proposed options.

The purpose of this report is to summarise the key results and assumptions of the economic CBA for the Indigenous Agricultural Products Credential.

The Economic Process

An economic CBA is undertaken to determine the economic efficiency of the Indigenous Agricultural Products Credential. The CBA compares costs of the credential with its benefits to producers, consumers and wider society.

Given the early stage of the credential process, the results of the economic analysis should inform the relative merits of the different credential implementation approaches, as opposed to definitively selecting a 'preferred option' to pursue. Results will provide insights that can inform the option design.



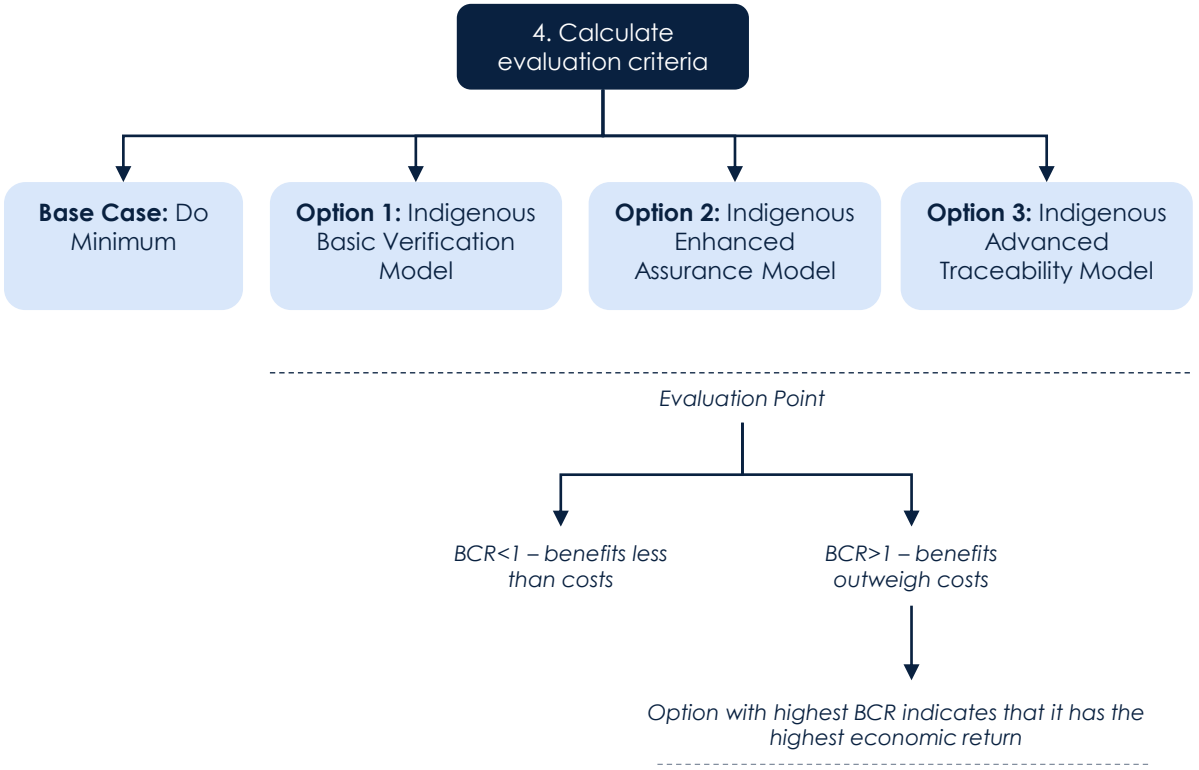
'Together We Grow, Together We Prosper' artwork by David Williams of Gilimbaa.

3

Steps in undertaking a CBA

The key steps applied within the economic process include:

1. **Defining objectives, base and project case options** – Defining the objectives in addition to the base case and project case for comparison.
2. **Identification of benefits and costs** – All benefits and costs are identified and quantified where possible. These are the costs and benefits that may be expected due to the move from the base case to the project case.
3. **Discount future costs and benefits** – All values are discounted to present value terms applying rates specified by relevant NSW Government guidelines.
4. **Calculate evaluation criteria** – The selected measure/s of net economic worth are calculated and interpreted. This report considers both the Net Present Value (NPV) and Benefit Cost Ratio (BCR) measures.
5. **Sensitivity analysis** – Where appropriate, decision criteria are calculated with a range of input values to present the sensitivity of the output values to inputs.
6. **Summarise and report economic findings** – The best performing option is determined from the relevant decision criteria and a report prepared to summarise findings.



Project Options

The economic analysis evaluates the three potential options for the Indigenous Agricultural Products Credential. All are evaluated versus a 'business as usual' base case whereby Indigenous producers continue to sell produce into the market without any recognised credential.

Models	Option 1 – Indigenous Basic Verification	Option 2 – Indigenous Enhanced Assurance	Option 3 – Indigenous Advanced Traceability
Description	Utilises existing third-party organisations to verify the Indigenous status of agricultural businesses producing these products.	In-depth manual audits are performed to verify that products are produced by Indigenous businesses, focusing on cultural connection, connection to country, access and benefit sharing, and caring for country	Utilises cutting-edge technology such as blockchain, Internet of things (IoT), and other emerging technologies for rigorous verification and auditing processes to ensure product authenticity, qualiy and adherence to Indigenous cultural practices.
Establishment Timing	► Quickest to implement. ► 1 – 2 years	► In-depth manual auditing design requiring longer setup. ► 1 – 2 years setup + 1 year for initial manual audit	► Traceability technology procurement and implementation requires more time. ► 4 – 5 years
Price premium	► ***Lower*** – products only based on ownership, not necessarily other Indigenous characteristics, lower consumer willingness to pay. ► Price premium follows a ramp-up period as buyers / consumers become aware of the credential	► ***Moderate*** – more confidence in the product credential means higher premium (willingness to pay). ► Price premium follows a ramp-up period as buyers / consumers become aware of the credential.	► ***Higher*** – most confidence and willingness to pay given full-traceability of provenance etc. ► Price premium follows a ramp-up period as buyers / consumers become aware of the credential.
Producer adoption	► ***Higher*** coverage as businesses only need to register with the relevant existing body. ► Producer adoption follows a ***faster*** ramp-up as businesses quickly become aware of familiar institutions and are willing to participate.	► ***Moderate*** coverage as manual auditing means higher barrier to gaining the credential and limits the number of participants. ► Producer adoption follows a ***moderate*** ramp-up as businesses become more aware and willing to participate.	► ***Lower*** coverage as higher costs for producers mean less will participate initially. Technology adoption could make easier longer term. ► Producer adoption follows a ***slower*** ramp-up as businesses take longer to embrace technology change.

Benefits Framework

The benefits framework outlines both the monetised and non-monetised benefits associated with the Indigenous Agricultural Products Credential. Monetised benefits include:

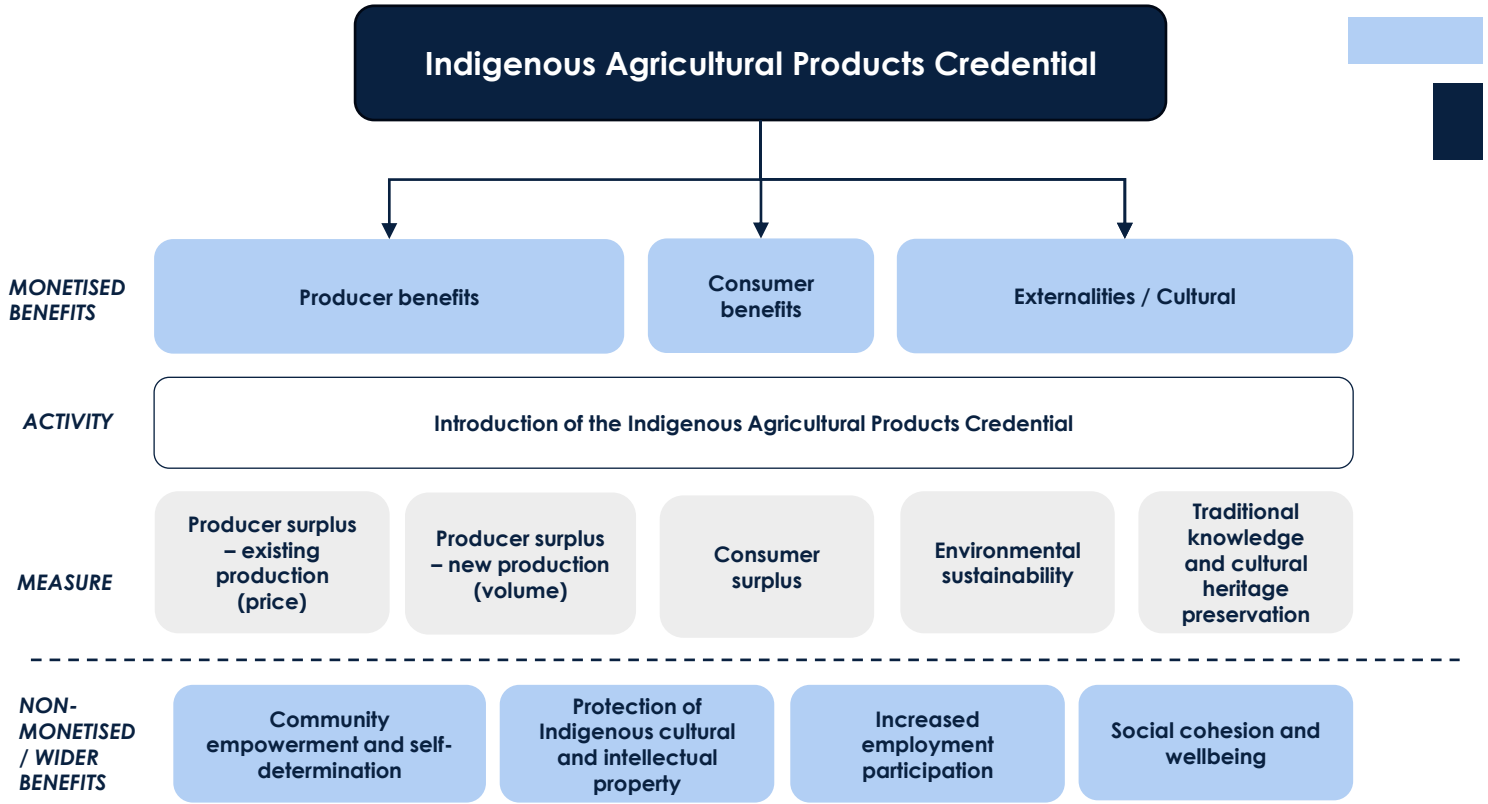
Producer surplus – existing production (price): The price premium associated with the credential increases the revenue received by existing producers, over and above their cost of production (profit). The difference between the new and old price received (price premium wedge) for all quantity sold is the benefit.

Producer surplus – new production (volume): Additional production is expected to come to market to service demand for certified agricultural products and take advantage of a price premium.

Consumer surplus: A subset of consumers are willing to pay over and above the new equilibrium market price for the certified indigenous agricultural production. This includes both wholesale and retail consumers. The increased willingness to pay for the certified production is an economic benefit.

Environmental sustainability: Farming practices associated with Indigenous production are assumed to have a lower environmental footprint relative to non-Indigenous farming in Australia. Carbon reduction as a result of this lower footprint can be taken as an economic benefit of the credential scheme (insofar that it is a substitute for non-Indigenous farming).

Traditional knowledge and cultural heritage preservation: The establishment of a certified market for Indigenous agricultural products will encourage the preservation of cultural heritage and practices. The Australian population has a willingness to pay for the preservation of Indigenous cultural heritage, which can be taken as an economic benefit.



Refer to the Appendices for a full list of economic and financial assumptions

Credential Costs

A high-level costing assessment has been performed to estimate the total costs associated with implementing each of the Indigenous Agricultural Credential Product Credential options.

Given the early stage of the proposed credential, these costs are indicative and should be treated as directional rather than precise. The level of confidence could be considered P50, with a process and use equivalent to a First Pass or Strategic Business Case.

Both ***establishment*** and ***ongoing operational*** costs have been estimated, falling to both government / third-party organisations and producers themselves. Establishment costs are spread over the indicative establishment timing period, while ongoing operational costs are incurred in each of the 30 years in the analysis period.

Costs associated with Option 1 are lower for both government and producers, given the lighter touch nature of the approach and that it is quicker to implement.

Option 2 costs are higher with the addition of the manual auding process. Option 3 costs are the highest due to the implementation of a technological solution for providing product assurance. These higher technological costs are borne by both government / third party verifiers and producers.

All options assume the scheme will be implemented and managed by an existing organisations.

Estimated establishment costs*

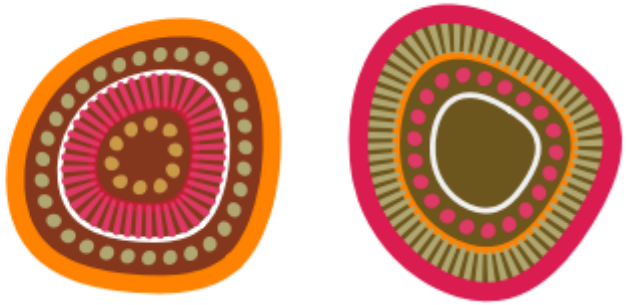
	Units	Option1 (Real $2025)	Option 2 (Real $2025)	Option 3 (Real $2025)
Government / third-party organisations				
Administrative setup	$	$825,000	$900,000	$1,500,000
Frameworks / guides / legal costs	$	$50,000	$200,000	$800,000
Awareness and Marketing	$	$60,000	$60,000	$60,000
Technology / IT	$	$0	$200,000	$5,000,000
Total	***$***	***$935,000***	***$1,360,000***	***$7,360,000***
Producers				
Design & marketing costs	$ / producer	$5,000	$5,000	$5,000
Application time and effort	$ / producer	$128	$170	$170
Technology / IT	$ / producer	$0	$0	$3,000
Production adaptation	$ / producer	$0	$750	$1,000
Total	***$ / producer***	***$5,128***	***$5,920***	***$9,170***

Estimated ongoing operational costs*

	Units	Option1 (Real $2025)	Option 2 (Real $2025)	Option 3 (Real $2025)
Government / third-party organisations				
Verification cost	$ per producer verified	$680	$2,040	$1,360
Ongoing administrative and compliance	$ per year	$675,000	$750,000	$900,000
Awareness and Marketing	$ per year	$12,000	$12,000	$12,000
Technology / IT	$ per year	$0	$4,000	$100,000
Producers				
Compliance	$ per producer per year	$170	$2,040	$1,700
Technology / IT	$ per producer per year	$0	$0	$600

*See Slides 21 and 22 of Appendix B for cost assumptions. Note – all costs should be verified with stakeholders during detailed scheme design.

Economic and Financial Results



'Together We Grow, Together We Prosper' artwork by David Williams of Gilimbaa.

Economic Analysis Results

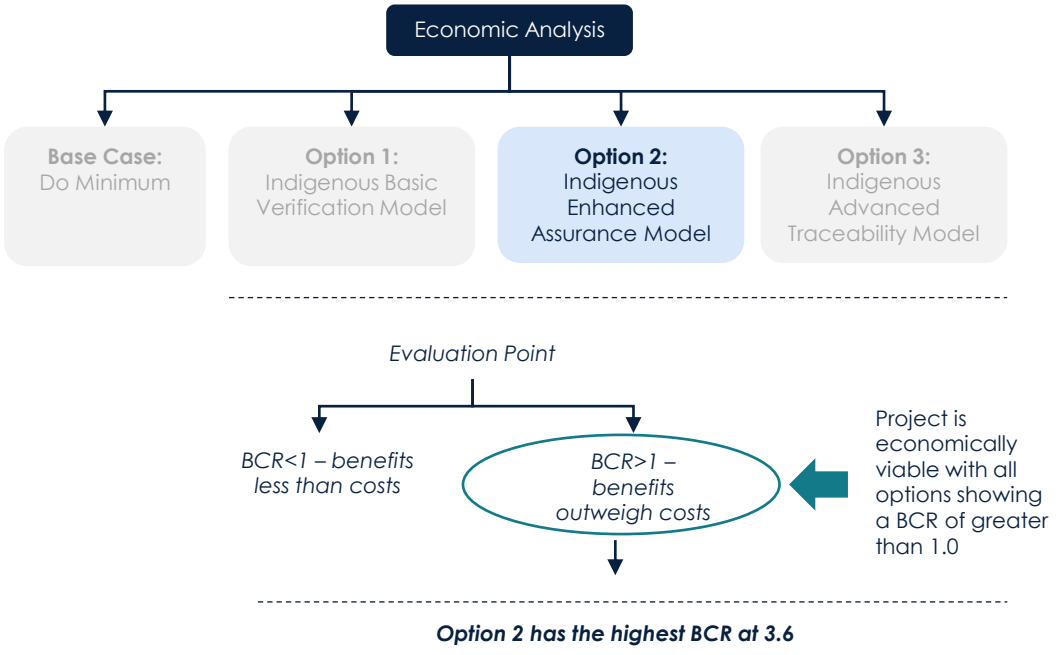
The following table outlines the results of the Cost Benefit Analysis (CBA). Key findings include:

- Speed of implementation is important – despite not having the same level of product assurance as other options, Option 1 sees benefits flowing sooner and therefore still performs strongly with a lower cost.
- Barriers to entry are critical - technological barriers are high for Option 3, meaning the higher price premium is not taken advantage of as much as for the other options. Reducing barriers at the same time as preserving product assurance is important.

Economic results (5% discount rate, 30-year analysis, $2025 present value terms)

Results	Option 1	Option 2	Option 3
Costs			
Establishment Costs	$3,989,213	$4,012,280	$7,811,015
Operational Costs	$12,073,002	$26,291,782	$17,590,350
Total Costs	**$16,062,215**	**$30,304,062**	**$25,401,365**
Benefits			
Producer surplus (price)	$31,093,394	$82,004,557	$33,058,022
Producer surplus (volume)	$7,773,349	$12,300,684	$3,305,802
Consumer surplus	$4,921,410	$9,374,113	$3,662,657
Environmental sustainability	$1,276,563	$2,020,055	$678,611
Traditional knowledge and cultural heritage preservation	$2,226,302	$4,288,881	$7,958,551
Total benefits	**$47,291,017**	**$109,988,291**	**$48,663,644**
Net results			
NPV Costs	$16,062,215	$30,304,062	$25,401,365
NPV Benefits	$47,291,017	$109,988,291	$48,663,644
NPV	**$31,228,803**	**$79,684,229**	**$23,262,279**
BCR	**2.9**	**3.6**	**1.9**

- The benefits of higher product assurance appear to outweigh the costs of higher assurance, producing a 'sweet spot' whereby producer buy-in is maximized to take advantage of it. After which there is likely to be diminishing returns.
- Option 2 appears to achieve this sweet spot, producing the highest economic return with a Benefit-Cost Ratio (BCR) of 3.6 and NPV of $79.7 million.



Option 2 has the highest BCR at 3.6

Economic Analysis Results

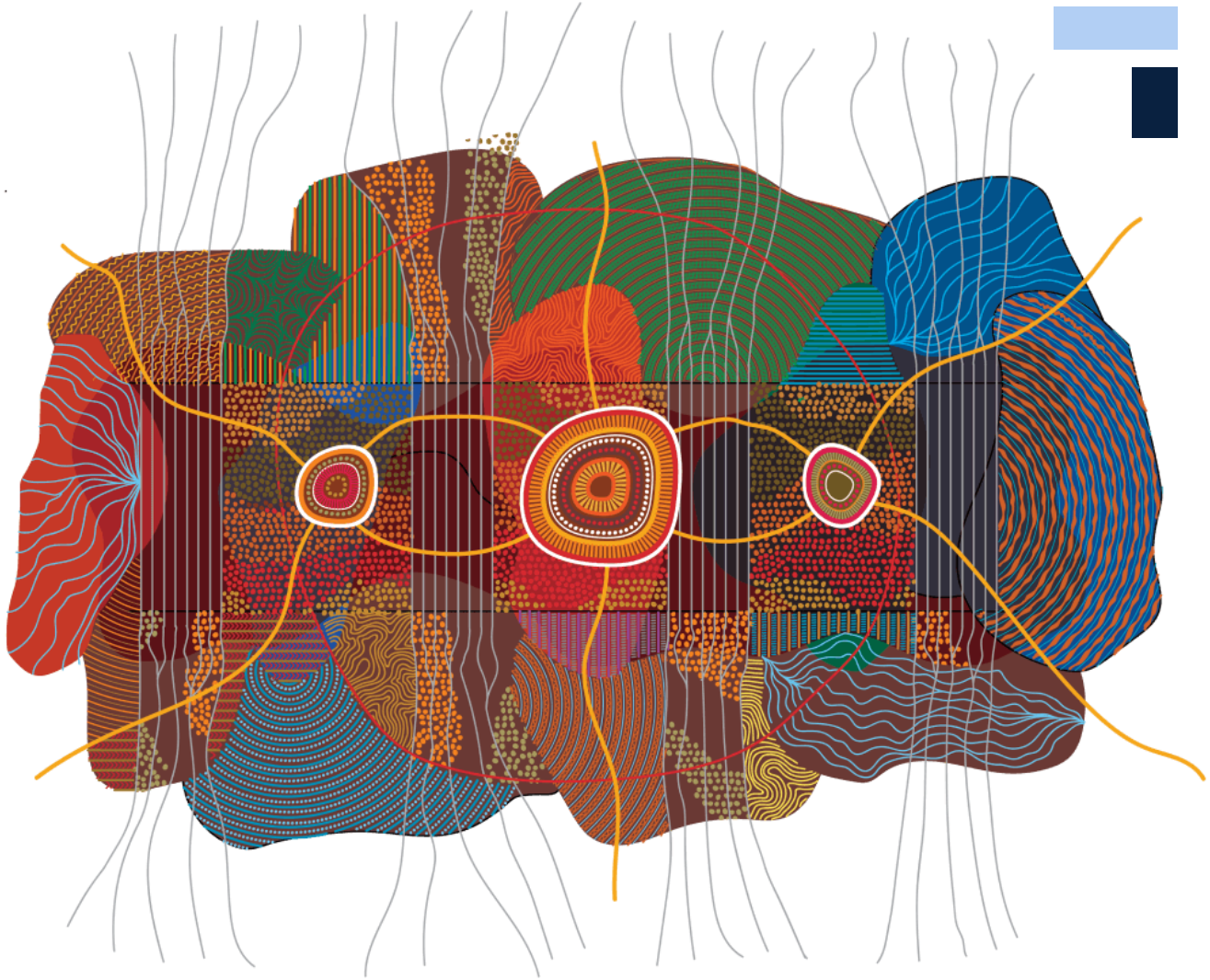
Non-Monetised benefits

Community empowerment and self-determination: A credential system enables Indigenous producers and communities to exercise greater control over how their products are defined, marketed, and governed. This supports self-determination by embedding Indigenous values within the production process.

Protection of Indigenous cultural and intellectual property: A credential helps safeguard cultural knowledge and practices from misappropriation by ensuring that only products genuinely connected to Indigenous producers and traditions carry the credential.

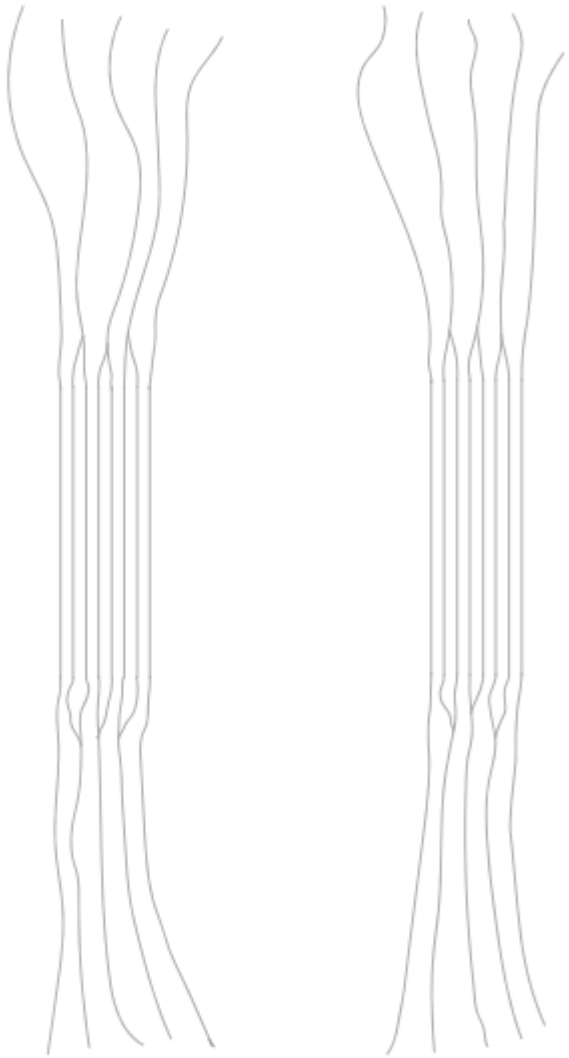
Increased employment participation: By supporting low-barrier, culturally relevant economic activity, the scheme can engage individuals who may be outside the formal labour market. It offers flexible participation suited to local needs, including seasonal or part-time roles, and enables the activation of underutilised labour — particularly women, young people, and Elders.

Social cohesion and wellbeing: Engagement in credentialed agricultural activity can strengthen social ties and reinforce cultural identity through connection to Country. The work fosters a sense of pride and purpose, contributes to social resilience, and may support improved mental health and wellbeing outcomes across participating communities.



'Together We Grow, Together We Prosper' artwork by David Williams of Gilimbaa.

APPENDICES



'Together We Grow, Together We Prosper' artwork by David Williams of Gilimbaa.

Appendix A: Economic sensitivity analysis results

The table summarises the BCR results from the sensitivity analysis. This analysis evaluates the BCR under various scenarios, including changes to discount rates, the price premium, producer adoption, capital costs, total costs, and benefits.

Under all sensitivities the BCR remains positive, demonstrating the economic robustness of each of the options. In particular, all options under a lower price premium or lower producer adoption retain economic viability.

Sensitivity results (BCR values, 5% discount rate, 30-year analysis, $2025)

Results (BCR)	Option 1	Option 2	Option 3
Discount rate			
5%	2.9	3.6	1.9
3%	3.2	3.8	2.1
7%	2.7	3.4	1.7
10%	2.4	3.1	1.4
Price Premium			
10% lower	2.7	2.9	1.6
20% lower	2.5	2.6	1.5
10% higher	3.2	3.4	1.9
20% higher	3.4	3.6	2.0
Producer adoption			
10% lower	2.9	3.2	1.8
20% lower	2.7	3.1	1.7
10% higher	3.3	3.5	2.0
20% higher	3.4	3.6	2.1
Establishment Cost			
40%	2.7	3.4	1.7
20%	2.8	3.5	1.8
-20%	3.1	3.7	2.0
-40%	3.3	3.8	2.2
Total Costs			
40%	2.1	2.6	1.4
20%	2.5	3.0	1.6
-20%	3.7	4.5	2.4
-40%	4.9	6.0	3.2
Benefits			
40%	4.1	5.1	2.7
20%	3.5	4.4	2.3
-20%	2.4	2.9	1.5
-40%	1.8	2.2	1.1

Appendix B: Economic and Financial Assumptions

The following table outlines the general economic assumptions used within this analysis.

Economic and financial assumptions	Unit	Option 1	Option 2	Option 3	Source
Model start year	year	2025	2025	2025	*Economic analysis assumptions*
Project commencement	year	2025	2025	2025	*Economic analysis assumptions*
Establishment period	year	2025 - 2026	2025 - 2027	2025 - 2029	*Economic analysis assumptions*
First year of operations	year	2027	2028	2030	*Economic analysis assumptions*
Evaluation period	years	30	30	30	*TPG23-08 NSW Government Guide to Cost-Benefit Analysis*
Discount rate	%	5.0	5.0	5.0	*TPG23-08 NSW Government Guide to Cost-Benefit Analysis, Economic analysis assumptions*

Benefits Assumptions

Producer surplus – existing production (price)

The price premium associated with the credential increases the revenue received by existing producers, over and above their cost of production (profit). The difference between the new and old price received (price premium) for quantity sold by the 750 existing Indigenous businesses is the benefit. The estimated price premium is between 2% and 7% which is somewhat on the conservative side as compared with that achieved with other credential schemes. Assumptions are outlined in the table below, with the participating business profile outlined on Slide 19.

Producer surplus – existing production (price) assumptions	Unit	Option 1	Option 2	Option 3	Source
Indigenous production (51% ownership)	$ per year	195,480,990			*NFF Market Sizing*
Majority Indigenous owned agricultural businesses	No.	750			*NFF Market Sizing – based on 51% Indigenous ownership*
Output per business	$ per year	260,641			*Derived based on Indigenous production and business number from NFF Market Sizing*
Price premium	%	2	6	8	*Project Assumption*
Producer adoption	%	65	60	20	*Project Assumption*

Benefits Assumptions

Producer surplus – new production (volume)

Additional production is expected to come to market to service demand for certified agricultural products. This could be through existing producers expanding production, or new entrants entering the market. The new production receives half of the price premium.* Assumptions are outlined in the table below, with the new production profile outlined on Slide 20.

Producer surplus – new production (volume) assumptions	Unit	Option 1	Option 2	Option 3	Source
Indigenous production (51% ownership)	$ per year	195,480,990			*NFF Market Sizing*
Output per business	$ per year	260,641			*Derived based on Indigenous production and business number from NFF Market Sizing*
Price premium	%	2	6	8	*Project Assumption*
Producer adoption – new production**	%	50	30	20	*Project Assumption*

*half the price premium reflects the upward sloping nature of the supply curve. That is, price needs to increase to induce more production from suppliers, with some suppliers receiving a price over and above what they would be willing to come to market with, up until the marginal producer where they receive exactly the price they are willing to produce at. Division by 2 approximates the benefit to the average producer.
Similarly, the downward sloping nature of the demand curve reflects that some consumers would be willing to pay above equilibrium price, up until the marginal consumer who is willing to pay exactly the equilibrium price. Division by 2 approximates the benefit to the average consumer.
**percent of existing production

Benefits Assumptions

Consumer surplus

A subset of consumers are willing to pay over and above the new equilibrium market price for the certified indigenous agricultural production. This includes both wholesale and retail consumers.* For the purposes of quantifying this benefit, it is assumed that 10% of the market is subject to a higher willingness to pay, with the average consumer in this segment prepared to pay between 2% and 7% above market price. Assumptions are outlined in the table below.

Consumer surplus assumptions	Unit	Option 1	Option 2	Option 3	Source
Amount of market in which consumers are willing to pay above equilibrium price**	%		10		*Project Assumption*
Willingness to pay over and above equilibrium (average consumer)***	%	2	5	7	*Project Assumption*

*the analysis is agnostic as to the distribution of the benefit between wholesalers and retailers (i.e. what price is passed on from the farmgate to the end consumer of the product).
**this can be thought of as 10% of consumers willing to pay above the market price. In reality, all consumers up until the marginal consumer would be willing to pay something above market price, with the marginal consumer willing to pay the exact market price (i.e. no consumer surplus). Taking 10% of consumers is a conservative estimate.
***this is the average willingness to pay over and above the equilibrium price. Some consumers are willing to pay more, and some consumers less, up until the marginal consumer who is willing to pay exactly market price.

Benefits Assumptions

Environmental sustainability

Farming practices associated with Indigenous agricultural production is assumed to be less carbon intensive relative to non-Indigenous farming in Australia, on average. Carbon reduction as a result of this lower footprint can be taken as an economic benefit of the credential scheme (insofar that it is a substitute for other non-Indigenous farming).

It is assumed that Indigenous farming practices are between 1% and 5% less carbon intensive, based on the option. This reduction is applied to the current rate of 1.2 kg per dollar of agricultural output in Australia to calculate the reduction in carbon for dollar of output. This reduction is applied to the new Indigenous output that comes to market as a result of the credential, with this amount being a proxy for what otherwise would be produced by non-Indigenous farmers.

Assumptions are outlined in the table below, with the new production profile outlined on Slide 20.

Environmental sustainability assumptions	Unit	Option 1	Option 2	Option 3	Source
CO2 per $ of output	Kg per $	1.2			*Estimate 0f 1.2 for agricultural sector. 85 million tonnes of CO2 per $71B of output: https://www.climatechangeauthority.gov.au/sites/default/files/documents/2024-09/2024SectorPathwaysReviewAgricultureandLand.pdf*
Carbon price	$ per tonne	$130			*Transport for NSW Economic Parameter Values - Table 6.1 Carbon emissions value per tonne for core analysis ($/tonne CO2-e)*
Carbon reduction per $ of certified production	%	1.0	3.0	5.0	*Project assumption*

Benefits Assumptions

Traditional knowledge and cultural heritage preservation

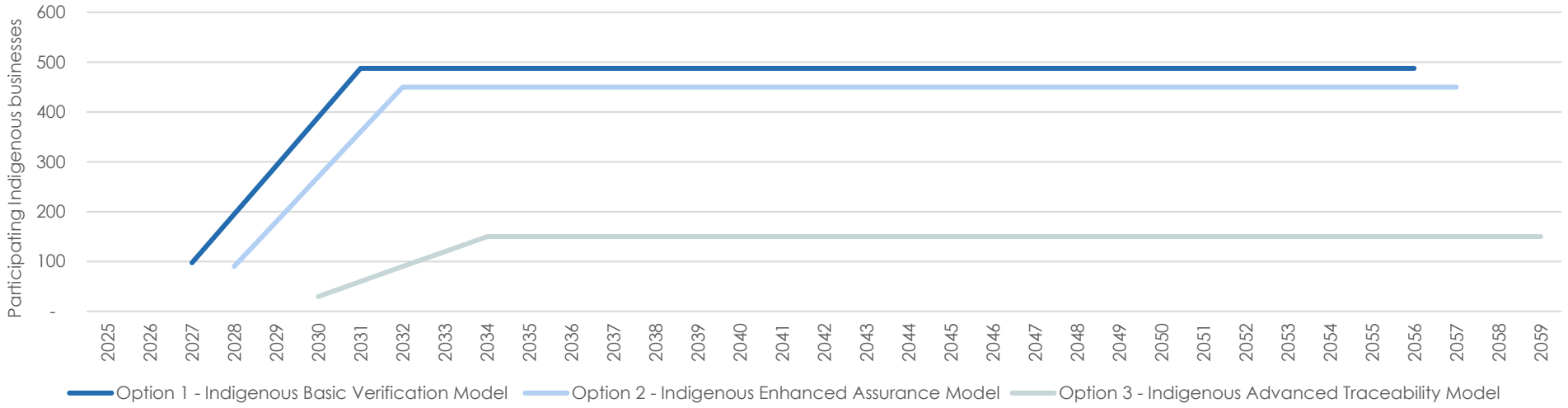
The establishment of a certified market for Indigenous agricultural products will encourage the preservation of cultural heritage and practices. The Australian population has a willingness to pay for this preservation, which can be taken as an economic benefit.

It is assumed that each of the 10.5 million Australian households are willing to pay $5 per year on average to preserve Indigenous traditional knowledge and cultural heritage, which is at the lower end of limited research estimates that aim to establish this willingness to pay. The contribution of the credential in preserving traditional knowledge and cultural heritage (i.e., the increased probability of preservation attributed to the credential alone) is conservatively taken to be between 0.3% and 1.0%.

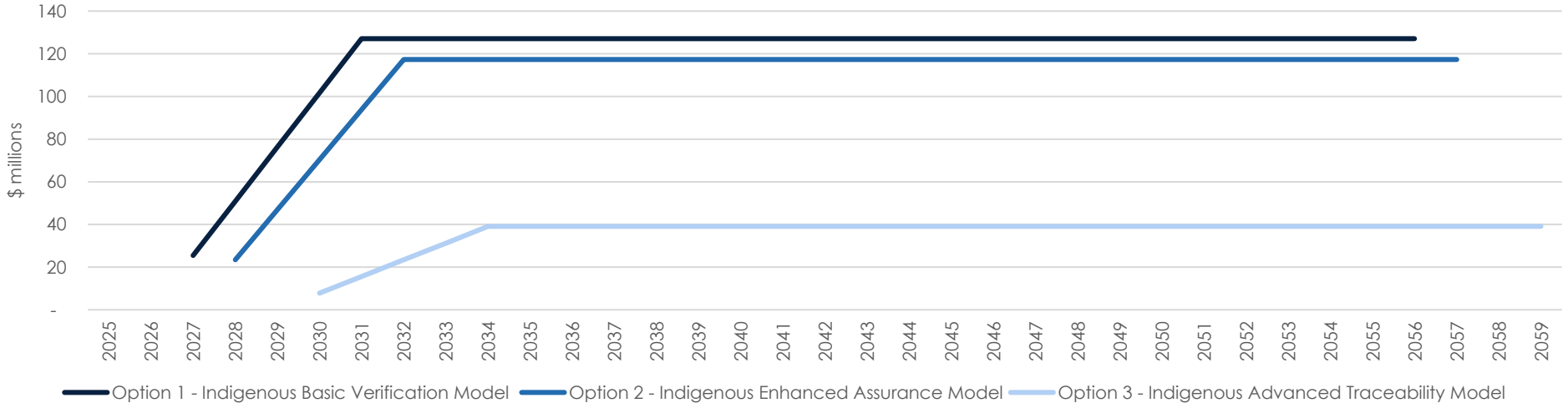
Cultural heritage preservation assumptions	Unit	Option 1	Option 2	Option 3	Source
Willingness to pay for cultural heritage preservation	$ per household per year	5			*Conservative estimate. WTP for Indigenous land management has been found to be closer to $100 per household in one study: https://journals.plos.org/plosone/article?id=10.1371/journal.pone.0023154*
Households in Australia	No.	10,457,121			*ABS household and family projections (2021 values escalated using Series III CAGR)*
CAGR Households	%	1.1			*ABS household and family projections – Series III*
Cultural preservation factor (contribution of the credential)	%	0.3	0.5	1.0	*Project Assumption*

Production Profiles (1/2)

Existing businesses who participate in the credential

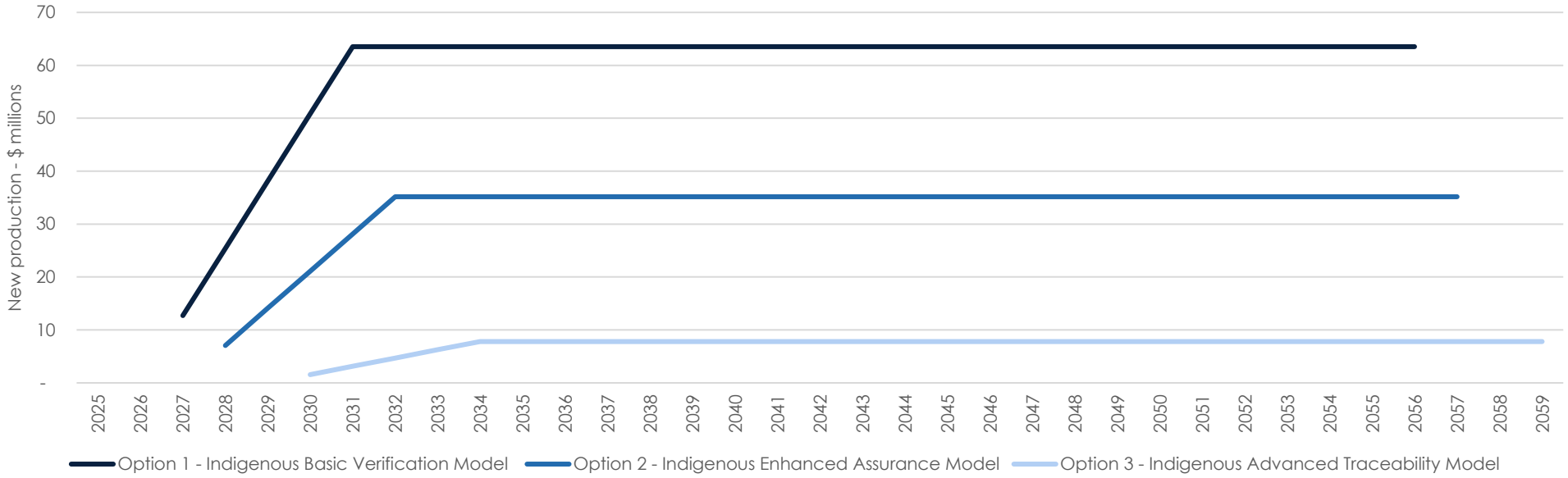


Existing production from businesses which participate in the credential



Production Profiles (2/2)

New production entering the market with the credential



Establishment Cost Assumptions

Cost Assumptions	Units	Option1 (Real $2025)	Option 2 (Real $2025)	Option 3 (Real $2025)	Assumptions
Government / third-party organisations					
Administrative setup	$	$825,000	$900,000	$1,500,000	*5.5 FTE for option 1, 6 FTE for Option 2 and 10 FTE for Option 3*
Frameworks / guides / legal costs	$	$50,000	$200,000	$800,000	*Option 2 (1 FTE) and Option 3 (5 FTE) - establishing frameworks for the audits, including consultation and review. Legal, expert and misc. costs ($50,000)*
Awareness and Marketing	$	$60,000	$60,000	$60,000	*Website design ($20,000), online comms strategies ($20,000), branding and logo design ($20,000)*
Technology / IT	$	$0	$200,000	$5,000,000	*Project assumption*
Total - Government / third-party organisations	***$***	***$935,000***	***$1,360,000***	***$7,360,000***	
Producers					
Design & marketing costs	$ / producer	$5,000	$5,000	$5,000	*Assumed cost of $5,000 to add logo/branding on to the packaging for each of the businesses*
Application time and effort	$ / producer	$128	$170	$170	*1.5h per application for Option 1, 2 hours per application for both Option 2 and 3*
Technology / IT	$ / producer	$0	$0	$3,000	*Project assumption*
Production adaptation	$ / producer	$0	$750	$1,000	*Project assumption*
Total - Producers	***$ / producer***	***$5,128***	***$5,920***	***$9,170***	

Note: *all costs should be verified with stakeholders during detailed scheme design.*

Establishment cost timing assumptions	2025	2026	2027	2028	2029
Option 1	15.0%	85.0%			
Option 2	5.0%	85.0%	10.0%		
Option 3	5.0%	20.0%	40.0%	25.0%	10.0%

Ongoing Operational Cost Assumptions

Cost Assumptions	Units	Option1 (Real $2025)	Option 2 (Real $2025)	Option 3 (Real $2025)	Assumptions
Government / third-party organisations					
Verification cost	$ per producer verified	$680	$2,040	$1,360	*8h per verification for Option 1, 24 hours per verification for Option 2 and 16 hours for Option 3*
Ongoing administrative and compliance	$ per year	$675,000	$750,000	$900,000	*Assume 4.5 of an FTE for option 1, 5 FTE's for option 2 and 6 FTEs for Option 3*
Awareness and Marketing	$ per year	$12,000	$12,000	$12,000	*20% of the marketing establishment costs ongoing*
Technology / IT	$ per year	$0	$4,000	$100,000	*2% of technology establishment costs*
Producers					
Compliance	$ per producer per year	$170	$2,040	$1,700	*Assume 2 hours for option 1, 24 hours for option 2 and 20 hours for Option 3*
Technology / IT	$ per producer per year	$0	$0	$600	*20% of technology establishment costs*

Note: *all costs should be verified with stakeholders during detailed scheme design.*

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Together We Grow, Together We Prosper' artwork by Wakka Wakka artist, David Williams.