# final report

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## Teys Australia Food Solutions: Strategic Portfolio Review

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## Executive Summary

Teys Australia Food Solutions (TAFS) has developed a set of strategic growth goals in the context of the broader Teys Australia (TA) strategy to become a leading provider of innovative red meat supply chain solutions linking Australian producers to global customers.

It is recognised that the achievement of substantial growth for TAFS will likely require expansion into new markets (domestic and export) and development of new value added meat products for new and existing customers. It is acknowledged that continuation of 'business as usual' will not generate the required EBIT impact to meet TAFS' growth targets.

The aim of the Strategic Portfolio Review Project was to develop and refine a process for identifying, analysing and managing a portfolio of new growth options for the TAFS business, with associated governance and reporting activities.

The Project undertook its work through the establishment of a Working Group, comprising the responsible TAFS executive, subject matter experts from within the TAFS business, an external innovation specialist and an industry representative from Meat and Livestock Australia. The Working Group was designed to represent a valuable cross-section of multi-disciplinary knowledge, including the Teys and TAFS business environment, broader industry dynamics and expertise in the management of the innovation process.

The Working Group met on an approximately fortnightly basis commencing 15 August 2014, through to mid-January 2015 (this included an approximate five week break during October/November due to operational demands and holidays). From February to June 2015 the Working Group met on an ad hoc basis to finalise the project outputs.

Over the course of its meetings, the Strategic Portfolio Working Group focused on two key streams of work:

i. **Design and definition of related suite of Growing Red meat demand (MLA-Teys) projects**: focused discussion to identify additional potential projects that may further support or expand the emerging TAFS Strategic Portfolio; conceptualisation to ensure integration and alignment with TAFS strategy, existing projects and MLA agenda
ii. **Development of the TAFS Strategic Portfolio**: focused discussion to identify and refine potential innovation initiatives to be pursued by TAFS as part of its growth strategy.

The second element – development of the Strategic Portfolio - was approached through review and adaptation of several established Portfolio Design and Management Processes, including frameworks in use by a diversified multinational food processing company, a leading aerospace engineering company (Boeing) and a large information technology firm (Hewlett-Packard). These established frameworks and processes were customised to reflect the specific strategic needs of the TAFS business, and applied to identify a short list of twelve opportunity areas and associated information gaps.

The analysis described above provides a comprehensive program of work towards development of a balanced Innovation Portfolio for TAFS. In terms of outcomes, the project was thus successful at three levels:

i) Producing a 'short list' of twelve opportunity areas as promising sources of growth for the TAFS business. This short list was narrowed down from a 'long list' of thirty six potential growth areas covering new markets, segments, categories and products. The analysis also identified key information gaps and additional data requirements;
ii) Recommending best practice portfolio management and governance processes and practices, customised to the current needs of the TAFS business, for implementation on an ongoing basis; and,
iii) Identifying a program of related collaborative projects to be undertaken in partnership with MLA, some of which have already commenced, to provide maximum integration and alignment with the overall Teys Australia business strategy, existing programs of work and MLA industry priorities.

This project provides a case study in the design and management of a strategic innovation portfolio and the identification of related information gaps. It highlights the usefulness of a defined process to construct an innovation portfolio that upholds key best-practice design principles, and outlines the benefits of actively managing this portfolio over time, using good governance practice and maintaining alignment with changing strategic priorities.

The adaptation of portfolio concepts and governance principles from leading firms including Boeing and Hewlett-Packard provides the opportunity to raise the standard of conceptual approaches to innovation management in use by the Australian red meat sector, thereby increasing rigour and robustness of the industry in the face of continuing change in market dynamics and in the competitive landscape.

The project also highlights the importance of applying a clear strategic context to the exercise of identifying information gaps and gathering data accordingly. Despite the attention given to 'big data' and other types of data-driven analytics, this project emphasises that the right strategic questions need to be asked first, before investment of time, effort or funds is made in assembling data sets or paying for access to existing databases.

Finally, the project also highlights the need to approach different types of innovation with different methods, metrics and management structures. A well balanced portfolio will cover initiatives that range from core optimisation (Horizon 1); through to adjacent extensions into new markets or value propositions (Horizon 2); to the creation of more radical or disruptive growth opportunities (Horizon 3). These different parts of the innovation portfolio require approaches, however all are required if an organisation wishes to sustain ongoing competitive advantage in a context of accelerating economic and technological change. Further research is required into the structures and management models that would allow systematic development of Horizon 2 and 3 innovations with regard to market and technology newness, given the specific requirements and constraints of the Australian red meat industry.

# Table of Contents

# 1 Project Overview

## 1.1 Background

Teys Australia Food Solutions (TAFS) currently produce a range of further processed fresh and cooked meat products and have developed a set of strategic growth goals in the context of the broader Teys Australia (TA) strategy to become a leading provider of innovative red meat supply chain solutions linking Australian producers to global customers.

It is recognised that the achievement of substantial growth for TAFS will likely require expansion into new markets (domestic and export) and development of new products for new and existing customers. It is acknowledged that continuation of 'business as usual' will not generate the required Earnings Before Interest and Tax (EBIT) impact to meet TAFS' growth targets. A more structure approach is required to create and capture value for both TA and their red meat supply chain partners.

## 1.2 Project Objectives

The aim of the Strategic Portfolio Review Project was to develop and refine a process for identifying, analysing and managing a portfolio of new growth options for the TAFS business, with associated governance and reporting activities.

In particular, the goals of the project were to:

- Adapt world's best practice frameworks for portfolio design, management and governance to reflect TAFS' current needs;
- Identify gaps in growth prospects from current revenue streams against stated growth targets;
- Generate a 'Long List' of potential growth opportunities for TAFS;
- Develop an appropriate screen to filter the Long List to a specific 'Short List' of growth opportunities;
- Establish recommendations for an ongoing management and governance model to support the TAFS innovation portfolio process;
- Provide a high-level definition of requirements for portfolio management tools[1].

[1] These are outlined in Appendix A.

# 2 Methodology

## 2.1 Working Group

The Project undertook its work through the establishment of a Working Group, comprising the responsible TAFS executive, subject matter experts from within the TAFS business, an external innovation specialist and an industry representative from Meat and Livestock Australia. The Working Group was designed to represent a valuable cross-section of multi-disciplinary knowledge, including the Teys and TAFS business environment, broader industry dynamics and expertise in the management of the innovation process.

The Working Group met on an approximately fortnightly basis commencing 15 August 2014, through to mid-January 2015 (this included an approximate five week break during October/November due to operational demands and holidays). From February to June 2015 the Working Group met on an ad hoc basis to finalise the project outputs.

Over the course of its meetings, the Strategic Portfolio Working Group focused on two key streams of work:

i. **Design and definition of related suite of TA-MLA value added projects**: focused discussion to identify additional potential projects that may further support or expand the emerging TAFS Strategic Portfolio; conceptualisation to ensure integration and alignment with TAFS strategy, existing projects and MLA agenda

ii. **Development of the TAFS Strategic Portfolio**: focused discussion to identify and refine potential innovation initiatives to be pursued by TAFS as part of its growth strategy.

## 2.2 Portfolio Framework

The second element listed above – development of the Strategic Portfolio - was approached through review and adaptation of several established Portfolio Design and Management Processes, including frameworks in use by a diversified multinational food processing company, a leading aerospace engineering company (Boeing) and a large information technology firm (Hewlett-Packard). These established frameworks and processes were customised to reflect the specific strategic needs of the TAFS business, and applied to identify a short list of twelve opportunity areas and associated information gaps.

An example of a best practice portfolio design and management framework used for the customisation is shown in Figure 1 below.

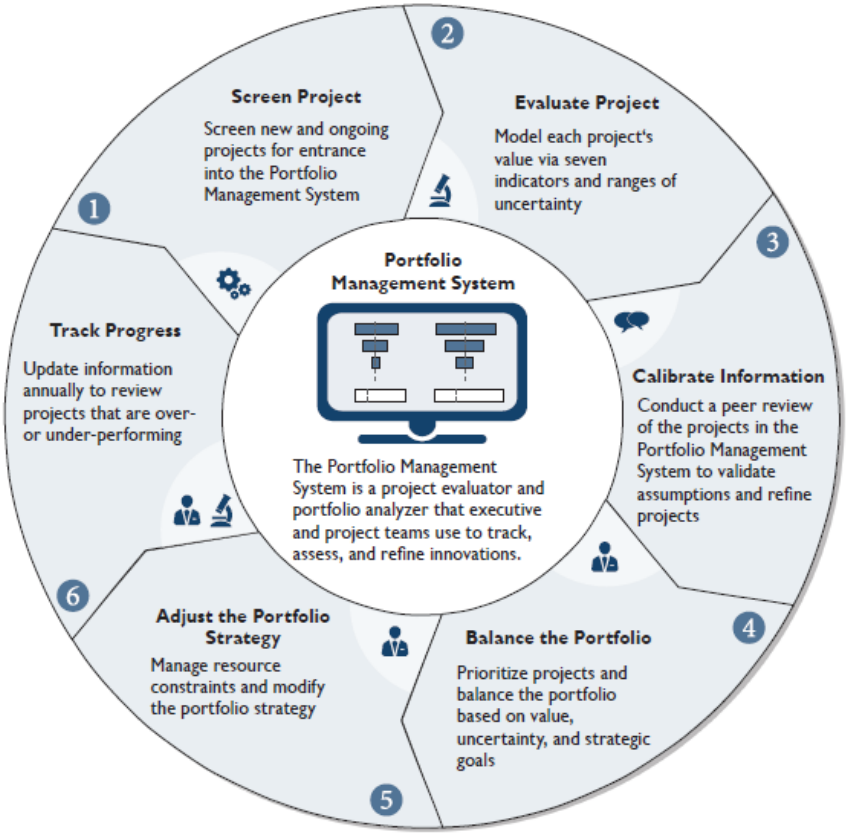



**Figure 1: Portfolio Management System: Key Components**[2]

Portfolio Management is defined as a dynamic business process by which a mix of active projects is planned, invested in and prioritized with an aim to achieve diversification and balance in meeting strategic goals. Portfolio Management translates the business strategy into portfolio measures called the target portfolio. Aligning the portfolio to the business strategy is a key to success.

**Portfolio Management is about ensuring we are doing the right projects.** The vital question we are trying to answer is "what is the value of the investment that we are making." Or said another way, "how can our business most effectively invest resources in solutions to meet our business strategy?"

The major elements of a portfolio management framework are defined as follows:

**Portfolio Management** - a process by which a mix of active projects is planned, invested in and prioritised with an aim to achieve diversification and balance in meeting strategic goals. **Drives prioritisation.**

[2] Adapted from Frost & Sullivan (2012)

**Portfolio** – a set of projects or products and services that a company is investing in to create future opportunity.

**Project Delivery Process** – the gated process used to co-ordinate and deliver projects in the portfolio. **Drives better decisions.**

**Project Management** – common methods and disciplines (e.g. goal definition, project planning, issue and resource management) used to deliver projects on time and within budget – that is **Project Management** is about ensuring we are doing projects right. **Drives better results.**

**Project** – a unique venture, with a beginning and an end, undertaken by people to meet established goals within defined constraints of time, resources and quality. Includes program-level, which is the execution of inter-related projects, but does not include routine or ongoing activities.

## 2.3 Portfolio Scope

The primary design question to address in development of a new portfolio is its scope. An evaluation framework such as that shown in Figure 2 can be used to define the scope of a specific group of projects or initiatives – in particular whether they should be classed as Innovation Initiatives, or Projects.

| Portfolio Type | Innovation/Strategic | Project |
|---|---|---|
| **Process Type** | Complex adaptive; exploratory | Deterministic; goal-oriented; exploitative |
| **Objective** | Superior strategy selection aligned with a set of matured concepts | Efficient allocation of resources to a fixed set of project deliverables |
| **Planning Horizon** | 2–20 years | 6–24 months |
| **Time Units** | Quarterly/Annually | Daily/Weekly/Monthly |
| **Task Units** | Concept | Project work breakdown structure (WBS) levels |
| **Resource Units** | Concept investment/cost | Individual staff member |
| **No. in Portfolio** | >50 maturing concepts | <15 defined projects |
| **Technology Readiness Level (TRL) / Value** | ≤TRL6; <<$500k (avg.) | ≥TRL6; ≥$500k (avg.) |
| **Attrition Rate** | >80% | <20% |
| **Decision Criteria** | Concept value; business strategy | Staff flexibility; critical path tasks |
| **Scenario Planning** | Multifaceted; opportunistic | Risk mitigation |

**Figure 2: Different Attributes of Innovation Portfolios vs. Project Portfolios**

Figure 3 below shows the logical relationship in terms of initiative/project maturity between the two types of portfolio – including the inclusion of stage gate project management.

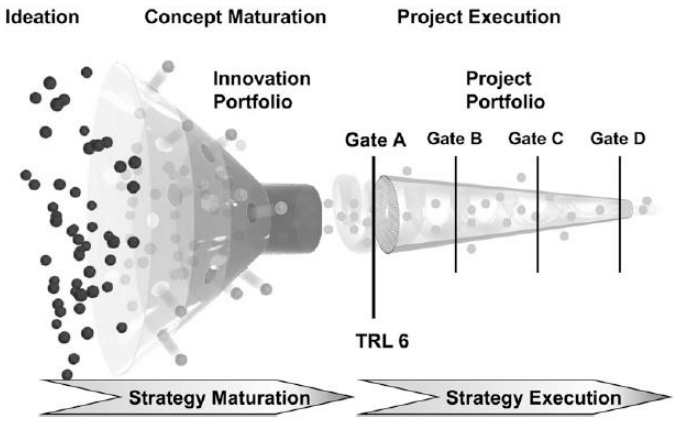



**Figure 3: Logical Relationship between Innovation Portfolio and Project Portfolio[3]**

This distinction highlights the following key strategic questions in defining the scope of the portfolio:

- Should the portfolio be limited to innovation and/or R&D efforts, or be inclusive of other key projects across the organisation?
- Is there sufficient organisational capacity to define and manage multiple portfolios addressing different types of strategic need?

In general, the portfolio management literature recommends the importance of avoiding a 'one size fits all' approach and instead adopting a 'horses for courses' perspective, which recognises that different timeframes, skill sets, project management approaches, metrics and expectations of success will apply to different portfolios within a business.

[3] Source: Mathews (2010)

## 2.4 Initial Evaluation: First Screen

Within the initial design phase of a new portfolio, for each individual potential project, an early-stage 'first screen' is applied which will explore potential opportunity areas to determine if they should officially enter the portfolio as projects or initiatives. This step involves definition of a minimum set of evaluative questions specific to the business objectives of the relevant organisation. An example of an initial evaluation screen is shown in Figure 4.


**Figure 4: Example of Generic First Screen to Determine Initial Entry to the Portfolio[4]**

As shown above, the key questions addressed by the First Screen are whether the potential initiative or growth opportunity provides:

- An attractive market context;
- The opportunity for dominant or significant competitive advantage; and,
- Acceptable levels of expected profitability.

It is important that these three generic aspects of the first evaluation screen are customised to reflect the specific strategic requirements and stage of innovation maturity of the relevant firm.

## 2.5 Initial Evaluation: Fast and Frugal Decision Tree

Companies may alternatively (or in addition) choose to use a decision tree to evaluate potential entrants to a portfolio. This method would be preferred if the data availability related to the potential initiative was limited, and/or if its future value is difficult to accurately forecast (for example due to lack of existing market data for a brand new category of product). The 'Fast and Frugal' Decision Tree shown in Figure 5 was developed by Boeing Aerospace for this purpose.

[4] Adapted from Frost & Sullivan (2012)

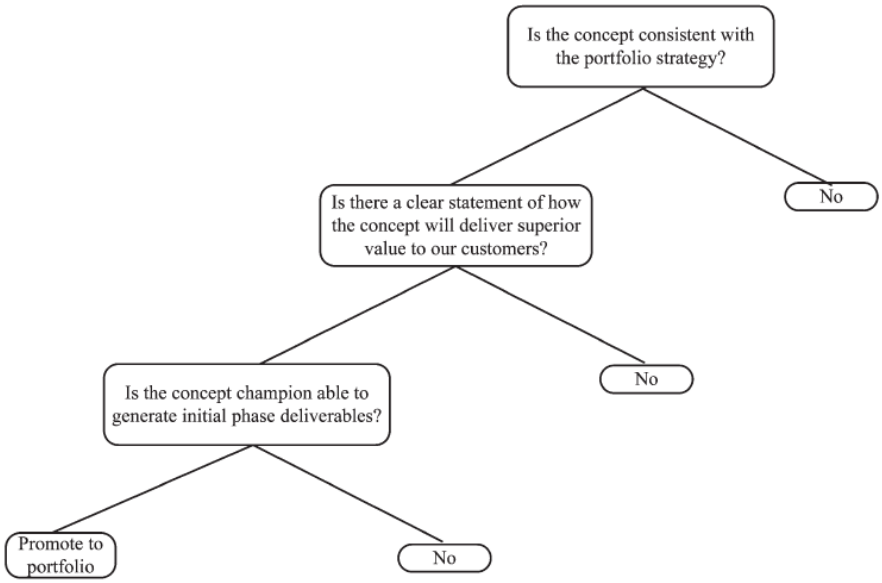



**Figure 5: Example of a 'Fast and Frugal' Decision Tree[5]**

Flexibility in the criteria and method used allows a firm to consider both financial and non-financial criteria for entry to a specific managed portfolio:

**Financial Criteria** may relate to a minimum economic impact on the business, such as addition to top-line revenue, reduction of costs e.g. through new technology capex, or expansion of the existing business model.

**Non-Financial Criteria** can be assessed through use of a simple decision tree, such as that shown in Figure 5 above.

[5] Source: Mathews (2010)

# 3 Outcomes

The analysis described above provides a comprehensive program and approach of work towards development of a balanced Innovation Portfolio for TAFS. In terms of outcomes, the project was thus successful at three levels, as discussed in the following sections.

## 3.1 Short List of Opportunity Areas

The project produced a 'short list' of twelve opportunity areas as promising sources of growth for the TAFS business. This short list was narrowed down from a 'long list' of thirty six potential growth areas covering new markets, segments, categories and products. The analysis also identified key information gaps and additional data requirements.

## 3.2 Best Practice Management and Governance Process

The project has also developed and recommended best practice portfolio management and governance processes and practices, customised to the current needs of the TAFS business, for implementation on an ongoing basis. (*These are commercial in confidence*).

## 3.3 Integrated Program of Work

The project has identified a program of related collaborative projects to be undertaken in partnership with MLA, some of which have already commenced, to provide maximum integration and alignment with the overall Teys Australia business strategy, existing programs of work and MLA industry priorities. These include range of red meat product development, category management and insights upskilling capability development initiatives.

# 4 Industry Benefits

This project provides a case study in the design and management of a strategic innovation portfolio and the identification of related information gaps. It highlights the usefulness of a defined process to construct an innovation portfolio that upholds key best-practice design principles, and outlines the benefits of actively managing this portfolio over time, using good governance practice and maintaining alignment with changing strategic priorities.

The benefits of a systematic approach to portfolio design and management are summarised below:

'The companies we've found to have the strongest innovation track records can articulate a clear innovation ambition; have struck the right balance of core, adjacent, and transformational initiatives across the enterprise; and have put in place the tools and capabilities to manage those various initiatives as parts of an integrated whole. Rather than hoping that their future will emerge from a collection of ad hoc, stand-alone efforts that compete with one another for time, money, attention, and prestige, they manage for "total innovation."'[6]

[6] Source: Nagji and Tuff (2012)

The adaptation of portfolio concepts and governance principles from leading firms including Boeing and Hewlett-Packard provides the opportunity to raise the standard of conceptual approaches to innovation management in use by the Australian red meat sector, thereby increasing rigour and robustness of the industry in the face of continuing change in market dynamics and in the competitive landscape.

The project also highlights the importance of applying a clear strategic context to the exercise of identifying information gaps and gathering data accordingly. Despite the attention given to 'big data' and other types of data-driven analytics, this project emphasises that the right strategic questions need to be asked first, before investment of time, effort or funds is made in assembling data sets or paying for access to existing databases.

Finally, the project also highlights the need to approach different types of innovation with different methods, metrics and management structures. A well balanced portfolio will cover initiatives that range from core optimisation (Horizon 1); through to adjacent extensions into new markets or value propositions (Horizon 2); to the creation of more radical or disruptive growth opportunities (Horizon 3). Figure 6 shows one way to break down initiatives within the portfolio into these horizon-centric categories.

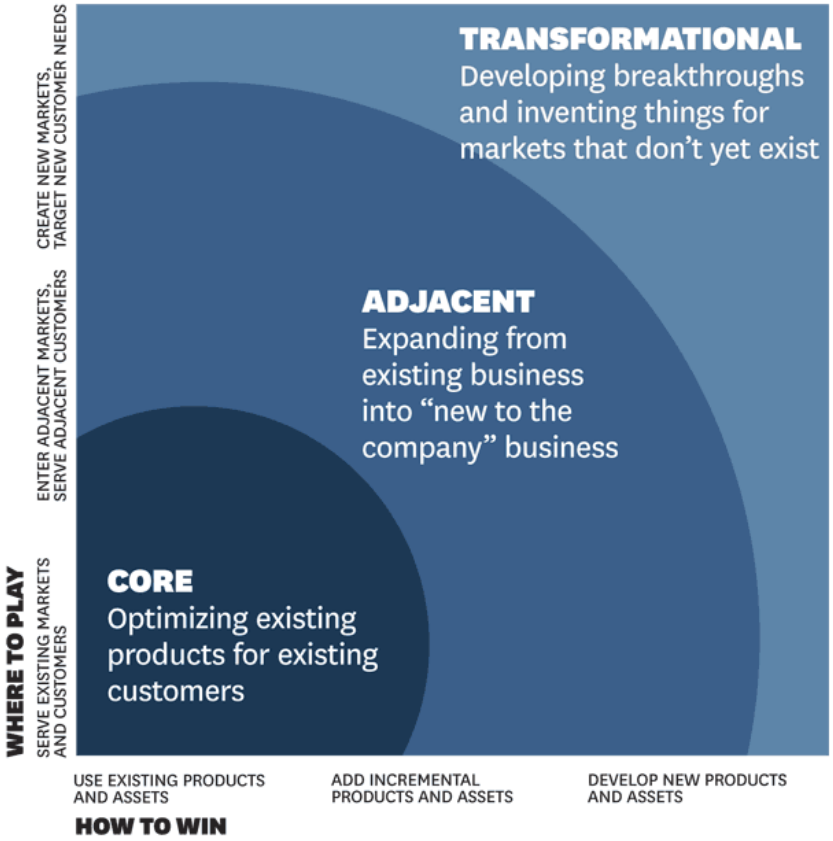



**Figure 6: Three Horizon Categorisation of the Innovation Portfolio – where to play / how to win**[7]

These different parts of the innovation portfolio require approaches, however all are required if an organisation wishes to sustain ongoing competitive advantage in a context of accelerating economic and technological change. Further research is required into the

[7] Adapted from Nagji and Tuff (2012)

structures and management models that would allow systematic development of Horizon 2 and 3 innovations, in particular with regard to adoption based on market and technology newness, strategic fit and alignment and probability of success for an enterprise and value chain particpants given the specific requirements and constraints of the Australian red meat industry.

# 5 Bibliography

Frost & Sullivan (2012) *Innovation Portfolio Management: Balancing Value and Risk*, Frost & Sullivan Best Practice Research

Mathews, S. (2010) *Innovation Portfolio Architecture: Part 1*, Research and Technology Management

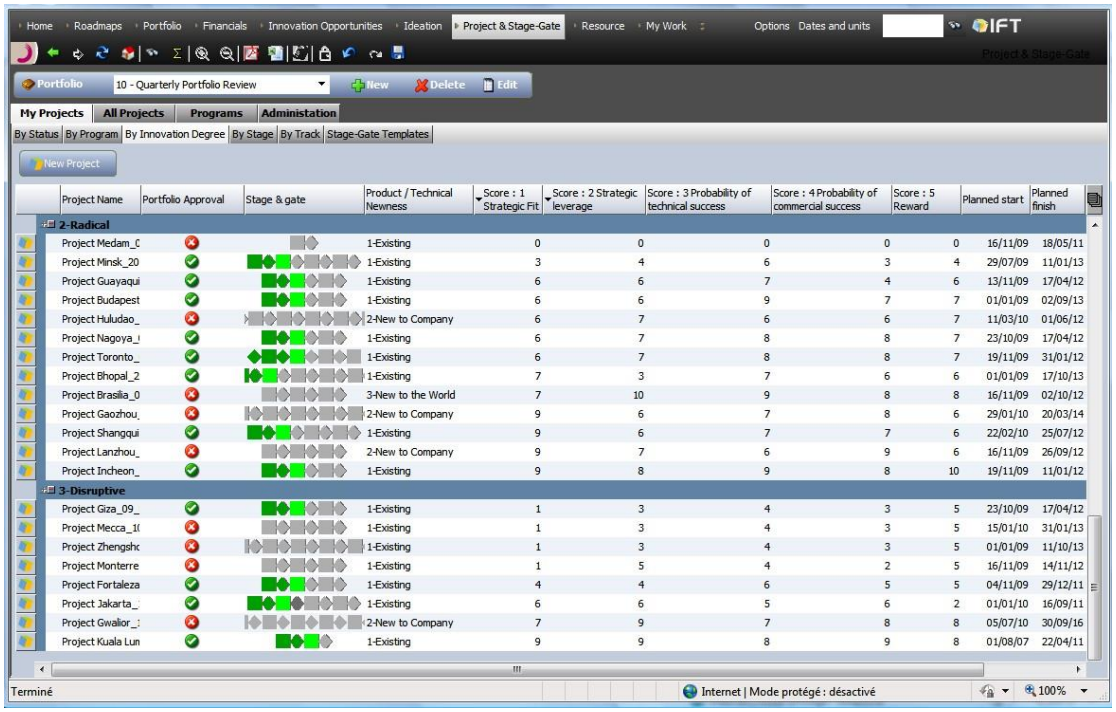
Nagji, B. and Tuff, G. (May 2012) *Managing Your Innovation Portfolio*, Harvard Business Review

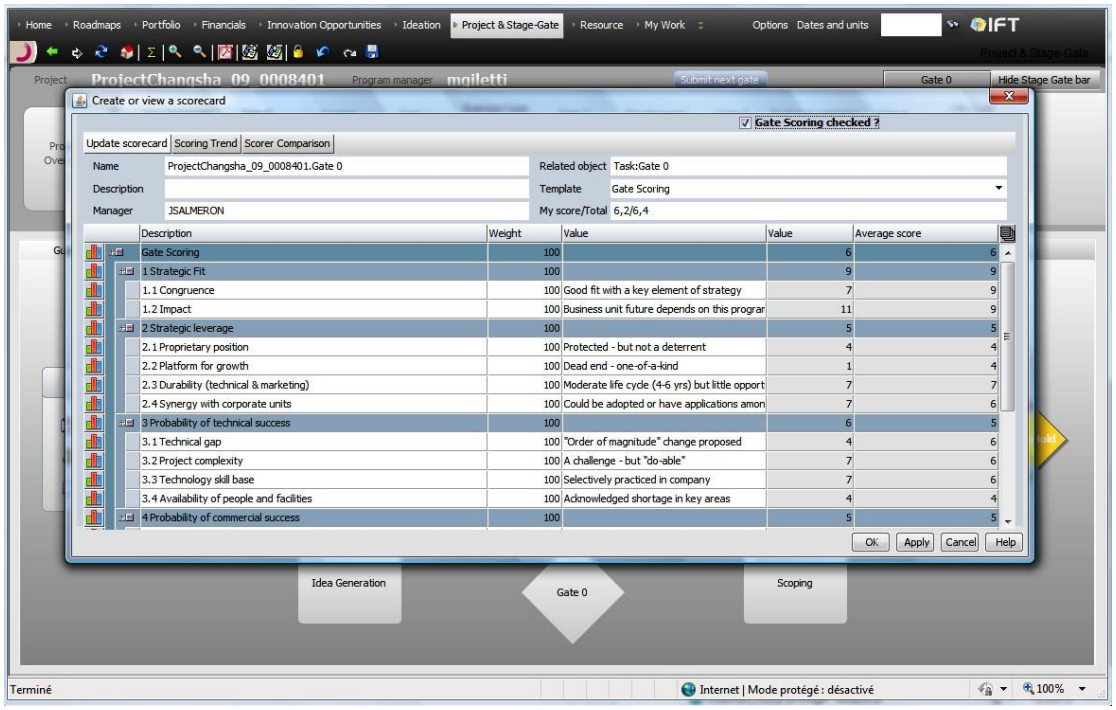
# Appendix A: Generic Portfolio Requirements

An ideal portfolio management platform focused on managing Core and Adjacent Innovations would support the following attributes:

- Define project and product portfolios, based on multiple criteria for membership and standard definitions of different types of project and operational activity
- Identify the value, strategic alignment and risk of candidate and current projects, based on quantitative metrics and scorecards
- Prioritize projects in a portfolio, according to value, alignment and balance
- Allocate strategic bucket funds to prioritized projects to optimize financial risk and return, align with the strategic plan and balance investments across businesses, customer segments and time horizons
- Identify project dependencies to ensure funded projects are not dependent on unfunded
- Perform what-if and sensitivity analysis to fine-tune your investment plans and react to changing market circumstances
- Use visual dashboards to predict, track and respond to portfolio performance

The figures below show an example of a Portfolio Management Dashboard.




Home
Roadmaps
Portfolio
Financials
Innovation Opportunities
Ideation
Project & Stage-Gate
Resource
My Work
Options
Dates and units
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My score/Total
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Description
Weight
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Value
Average score
Gate Scoring
1 Strategic Fit
1.1 Congruence
Good fit with a key element of strategy
1.2 Impact
Business unit future depends on this prograr
2 Strategic leverage
2.1 Proprietary position
Protected - but not a deterrent
2.2 Platform for growth
Dead end - one-of-a-kind
2.3 Durability (technical & marketing)
Moderate life cycle (4-6 yrs) but little opport
2.4 Synergy with corporate units
Could be adopted or have applications amon
3 Probability of technical success
3.1 Technical gap
"Order of magnitude" change proposed
3.2 Project complexity
A challenge - but "do-able"
3.3 Technology skill base
Selectively practiced in company
3.4 Availability of people and facilities
Acknowledged shortage in key areas
4 Probability of commercial success
OK
Apply
Cancel
Help
Idea Generation
Gate 0
Scoping
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Home
Roadmaps
Portfolio
Financials
Innovation Opportunities
Ideation
Project & Stage-Gate
Resource
My Work
Options
Dates and units
Portfolio
10 - Quarterly Portfolio Review
New
Delete
Edit
Dashboard
Stage-Gate Project Timeline
Scenario-Building
Capacity Analysis
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Pie Chart Analysis
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Project Linyi_09_0005904
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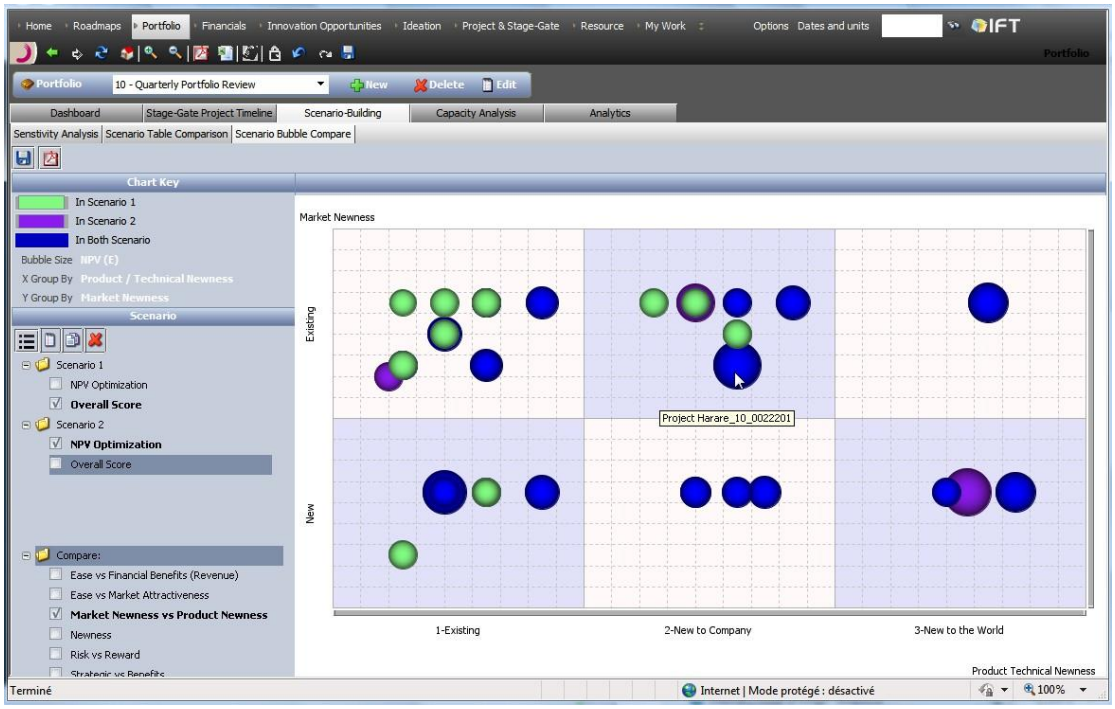
Home
Roadmaps
Portfolio
Financials
Innovation Opportunities
Ideation
Project & Stage-Gate
Resource
My Work
Options
Dates and units
IFT
Portfolio
10 - Quarterly Portfolio Review
New
Delete
Edit
Dashboard
Stage-Gate Project Timeline
Scenario-Building
Capacity Analysis
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Scenario Table Comparison
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Y Group By Market Newness
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Scenario 2
NPV Optimization
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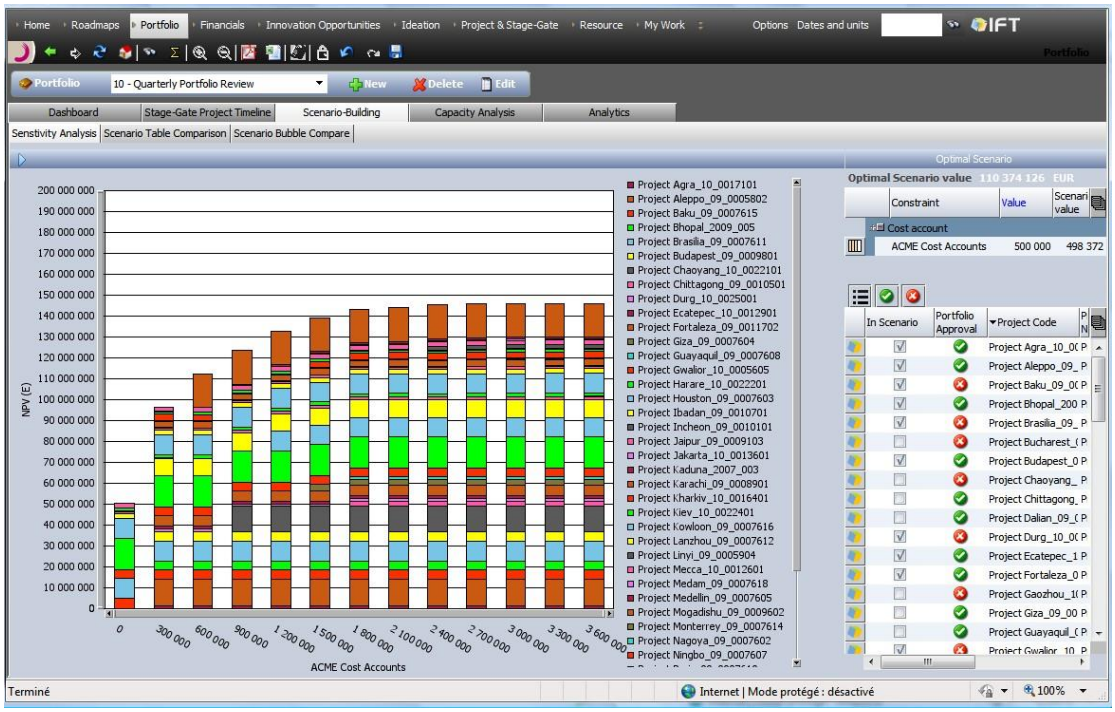
Home
Roadmaps
Portfolio
Financials
Innovation Opportunities
Ideation
Project & Stage-Gate
Resource
My Work
Options
Dates and units
IFT
Portfolio
10 - Quarterly Portfolio Review
New
Delete
Edit
Dashboard
Stage-Gate Project Timeline
Scenario-Building
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Home
Roadmaps
Portfolio
Financials
Innovation Opportunities
Ideation
Project & Stage-Gate
Resource
My Work
Options
Dates and units
IFT
Portfolio
10 - Quarterly Portfolio Review
New
Delete
Edit
Dashboard
Stage-Gate Project Timeline
Scenario-Building
Capacity Analysis
Analytics
Pie Chart Analysis
Bar Chart Analysis
Bubble Chart Analysis
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Probability of Technical Success
Project Brasilia_09_0007611
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