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FISHERIES RESEARCH &
DEVELOPMENT CORPORATION

National Inshore Fisheries Workshop 2015

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In submitting this report, the researcher has agreed to FRDC publishing this material in its edited form.

Foreword

The National Inshore Fisheries Workshop (NIFW) 2015, held at the Sydney Fish Market on 29 -30 October 2015, was a follow up to a workshop held in March 2008. The 2008 workshop led to the creation of *A Strategic Plan for Australia's inshore fisheries - (FRDC 2009-318)*. The Plan was to provide a guide to relevant industry bodies to focus their actions in areas intended to improve the industry's leadership and capacity and strengthen the future security for Australia's inshore fishers.

The 2015 NIFW was an opportunity to revisit the Plan. It also provided a forum for planning activities and projects that could improve the performance and security of our small scale inshore fisheries (SSIF).

Like many jurisdictions internationally, SSIF in Australia have been subjected to a range of pressures from management, political and economic perspectives. The NIFW provided an opportunity for leaders of Australian inshore fisheries to learn from the experiences of international speakers. The speakers focussed on how their organisations have sought to change the socio-political landscape for small scale fisheries in the United Kingdom and United States of America. It also provided an opportunity for inshore fishers to share their experiences and create an environment where they can identify with leaders from other inshore fisheries. This is likely to increase their interactions in the future.

The NIFW also provided an opportunity to revisit the areas for future development of our SSIF. This could better help focus the direction of future developments through a more co-ordinated approach to match the outcomes from the Australian Fisheries Management Forum Fisheries Management Workshop of March 2014 (FRDC 2013-235).

The NIFW enabled participants to focus on the challenges and opportunities that present themselves to our diverse SSIF. The NIFW has resulted in a revised draft strategic plan which identifies key objectives and outcomes for improving the performance of Australia's SSIF. The key objectives for improving and enhancing the development and leadership of our SSIF were identified at the NIFW as:

- Building Industry Capacity;
- Improving Communication; and
- Industry Development

It is expected that the updated draft strategic plan will be used by industry groups, government management agencies, and the Fisheries Research and Development Corporation (FRDC) for identifying and developing projects and programs that will help secure the future role of our SSIF. It will also likely enhance the ability of relevant industry groups to better service their members through more effective engagement in the management processes and promotion of their industries to communities that benefit from their activities.

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We particularly wish to thank the following participants for their active commitment to the workshop and openly sharing their thoughts and experiences with other participants:

| | |
|-------------|--|
| C Calogeras | Northern Territory Mud Crab Fishery – Executive Officer |
| P Manning | Northern Territory Spanish Mackerel Fishery |
| C Druitt | Northern Territory Coastal Line Fishery |
| J Hay | Northern Territory Coastal Line Fishery |
| K Holder | Women’s Industry Network Seafood Community |
| H Bayly | South Australian Marine Scalefish Fishery |
| B Barnes | South Australian Marine Scalefish Fishery |
| J Barnes | South Australian Marine Scalefish Fishery |
| Z Skrypec | South Australian Lakes & Coorong Fishery |
| A Barnes | South Australian Blue Crab Pot Fishery |
| C Ward | Queensland Gulf Fishery |
| J Harris | Queensland Line, Net & Crab Fishery |
| E Perez | Queensland Seafood Industry Association |
| R Pender | The Fishermen’s Portal - Queensland |
| K Harris | Queensland Line, Net & Crab Fishery |
| A Tobin | James Cook University |
| R Hughes | Queensland Line, Net & Crab Fishery |
| R Dickenson | Queensland Line, Net & Crab Fishery |
| M Boulter | Sydney Fish Market |
| D Elliott | New South Wales Mesh Netting Fishery |
| T Beatty | Professional Fishermen’s Association New South Wales – Executive Officer |
| R Fidden | New South Wales Mesh Netting Fishery |
| T Billin | New South Wales Mesh Netting and Trapping |

| | |
|--------------|---|
| | Fishery |
| B Denny | Tasmanian Dive Fishery |
| C Garland | Tasmanian Scalefish Fishery |
| T Price | West Coast Estuarine Fishery |
| M Cammilleri | Western Australian Fishing Industry Council |
| B Cooke | Western Australian Shark Fishery |
| J Stoll | Walking Fish Co-op |
| T Pickerell | UK Seafish Authority |
| S Sen | Sydney Fish Market – Research Centre |
| J Susman | Fishheads Seafood Strategy |
| P Horvat | FRDC |
| J Fielding | FRDC |

We also thank the Sydney Fish Market and its Sydney Seafood School for supporting the workshop.

Abbreviations

AFMF – Australian Fisheries Managers Forum

CoOL – Country of Origin Labelling

FRDC – Fisheries Research and Development Corporation

NIFN - National Inshore Fisheries Network

NIFW – National Inshore Fisheries Workshop

SFM – Sydney Fish Market

SSIF – small scale inshore fisheries

UN FAO – United Nations Food & Agricultural Organisation

Executive Summary

The National Inshore Fisheries Workshop (NIFW) 2015 was facilitated to allow a wide range of fisher interests from across Australia with small scale inshore fisheries (SSIF) to identify their issues and areas of common interest. Participants were exposed to the experiences of international, national and state industry leaders. The NIFW provided information regarding how other inshore fisheries have responded to a range of threats and limitations to their fisheries. It also provided examples of how individual fisheries improved their capacity to deliver local safe seafood to consumers, while engaging communities in their role as a key food producer.

NIFW 2015 was held at the Sydney Fish Market (SFM) on 29 and 30 October 2015. Participants were provided with an insight to the workings of Australia's largest wholesale seafood market and toured the morning market. In addition, they gained valuable information regarding opportunities to promote seafood consumption through the SFM's Seafood School.

Participants were also provided with information regarding some successful international experiences involving small scale fisheries. These focussed on engaging communities in understanding and supporting fisheries and their role in the community. It was shown that if done right this process assists in securing industry interests and access to fish stocks, while competing with a range of other interests such as recreational fishing, coastal development and conservation expectations.

NIFW 2015 provided an opportunity to review and update the strategic plan developed in 2008 and provided fisher representatives with an understanding of a range of activities and programs that are being delivered to support SSIF both nationally and internationally.

The workshop determined a vision for our SSIF as:

“For the diverse and multifaceted inshore fisheries to have an empowered industry, with secure access rights in sustainable fisheries that are recognised as a valuable source of safe fresh food, provided by viable and profitable businesses which are valued by the community.”

The participants identified the need to support the Nation's inshore fisheries through the establishment of a National Inshore Fisheries Network (NIFN). This Network could provide guidance for industry groups at a local, state and national level focussing on research and development initiatives that support Australia's SSIF. Given there are several layers of industry representation in most jurisdictions there was no desire to further compound this space. Rather, it could support those groups in better delivering on the wide range of outcomes and expectations of fishers and their local, sector or regional group.

The range of benefits that could flow from more effective capacity building in our SSIF and their supporting organisations are:

1. Improved leadership and governance of industry groups enhancing their ability to effectively represent the interests of fishers;
2. More effective processes for identification and focussing of research and development needs and opportunities, as occurs in other fishery sectors;
3. Improved community engagement and appreciation of the social and economic role these many small businesses make in their region;
4. Enhancing the capacity for improved fisheries management processes and outcomes by the creation of effective partnerships that can be supported by improved co-management processes.

The benefits flowing from improving the capacity of the industry could lead to:

1. Improved capacity to engage with other interest groups and reduce conflicts between user groups
2. Improved resource sharing arrangements and recognition of the role that commercial fisheries play in the provision of a key food supply;
3. Improved economic and social outcomes for many small coastal communities;
4. Enhanced access to fisheries resources for the majority of Australians who are dependent upon commercial fishers to supply their seafood;
5. Improved resource management supported by improved fisheries outcomes through improved research, development and innovation; and
6. Reduced transaction costs for government as the shift to increased co-management will reduce demands from competing sectors and increase industry satisfaction with management outcomes through a strengthened partnership approach.

The NIFW identified a need to focus SSIF efforts at improving the performance and ability of industry organisations to support the delivery of programs and projects. Improved approaches of fishers, their groups and the industry at large should then flow on to stronger relationships with management agencies and increased recognition from the community and governments of the need for SSIF and their role in food production.

Keywords

small scale inshore fisheries, industry capacity, leadership, co-management, sustainability, transactions costs, community, fisheries management, access, market, economic, social, partnerships, representation

Introduction

This project was identified out of the need to improve the capacity of our SSIF. This took account of the changes occurring, particularly internationally, in improving the capacity of fisheries to be more effective members of their community and enhancing their recognition and role within those communities.

Small scale inshore fisheries, both internationally and nationally, have been subject to high levels of political and management intervention for reasons other than resource sustainability. The need to shift the thinking applied to those fisheries is underlined by a United Nations Food and Agricultural Organisation (UN FAO) project looking at “Best Management Practice”. This project is seeking to develop a framework for demonstrating the sustainability of small scale, particularly data poor, inshore fisheries with regard to the resource they access, as well as the economic and social values they provide to their communities and regions.

Seafood Directions 2015 gave significant insight to the issues and challenges facing our SSIF. It also afforded a chance to expose key industry representatives to the opportunities that have been identified and the actions implemented in other jurisdictions with SSIF. The ability to connect the producer, their product and the consumer is, and has been, a challenge for many seafood sectors. This particularly applies to those that lack the frameworks and capacity to benefit from a co-ordinated approach to better marketing and promotion.

The NIFW provided an opportunity for 26 fishers and representatives to review previous actions, including the 2008 strategic plan in support of our inshore fisheries. Guest key note speakers from Seafood Directions 2015 exposed fishers to experiences from other small scale fisheries around the world, together with an introduction to the UN FAO small scale inshore fisheries framework and project.

Industry members were able to contribute to an improved understanding of the successes and challenges for the diverse small scale inshore fisheries sectors in Australia.

The NIFW facilitated an understanding of:

1. The opportunities that may exist for fishers and fisheries in the inshore sector;
2. How the sectors could develop opportunities for enhanced security of access;
3. How to improve the market potential for their products; and
4. Ways to enhance community support for the role of providing fresh Australian seafood to our domestic and export markets.

The expected outputs for the project were:

1. Organisation and delivery of a workshop;
2. Facilitation of the workshop; and
3. Preparation of workshop materials and outcomes.

Participants worked through a series of decision making frameworks. A broad range of issues which were initially identified were refined into a set of key strategic areas. In the future, these areas could be focussed on in order to improve the capacity and effectiveness of our SSIF in participating in co-management processes and community engagement initiatives.

The NIFW was delivered using a program of review of the previous inshore fisheries workshop and planning processes. This was followed with presentations from guest speakers, structured group discussion for issues identification, and problem solving for the identified key issues for SSIF. A structured approach for supporting industry capacity to plan for and address those issues and challenges and subsequent implementation was then identified.

Discussion

The NIFW was attended by 28 fishers and industry representatives from the majority of Australia's States and the Northern Territory, together with six guest presenters and FRDC staff. This was the second such workshop, with the first being in 2008, followed by a project to progress the outcomes - *National Inshore Fisheries Strategic Plan Extension and Development Opportunities (FRDC 2009/318)*.

What constitutes a SSIF?

To assist in understanding what sectors this project focussed on the following range of characteristics were identified for an SSIF:

1. Fisheries that operate in estuaries and relatively shallow inshore waters;
2. Fisheries that may have large numbers of operators with complex access arrangements for a range of different species;
3. Fisheries that exist in areas close to growing development and urbanisation; and
4. Fisheries that operate in areas that overlap a range of recreational and other commercial pursuits such as recreational fishing, eco-tours, diving, surfing etc.

Guest speakers

Guest speakers at the NIFW were Tom Pickerell (Seafish UK), Sevaly Sen (SFM Research Centre – UN FAO Small scale and multi species coastal fisheries project), Joshua Stoll (Walking Fish USA), John Susman (Fish Tales - seafood marketer), Brad Warren (Oceanwatch Australia) and Niklas Wehner (Global Sustainable Seafood Initiative). The guest speakers provided participants with information on activities undertaken in a range of national or international SSIF. This range of ideas could be used to support programs for future capacity building of our SSIF.

The information presented included:

1. Alternative sources for information that link producers and their products to consumers;
2. How to profile fisheries and provide information to help consumers make choices about the products they buy and consume, based on the fishery's ecological footprint and resource sustainability;
3. Identification and development of management tools to improve management outcomes and engagement of fishers in their fisheries and benchmarking of those processes with limited resources and data;
4. Examples of opportunities that exist for profiling of species and branding strategies to increase market penetration and consumer acceptance of seafood;
5. Alternative mechanisms for directly linking fishers with consumers and increasing industry's profile and social licence within their communities; and
6. Processes associated with third party certification of fisheries and what it can mean for consumer confidence and fishery security.

Inshore Fisheries Strategic Plan 2008

The strategic plan developed in 2008 was reviewed at the NIFW and the vision, objectives and proposed outcomes were reworked and updated to reflect changed circumstances for our SSIF.

The diversity of experiences within our SSIF were explored, with participants given an understanding of how different industry groups have addressed objectives identified in the plan. This included actions such as:

- consumer engagement
- profiling and promotion of their industry and product
- the use of third party certification or recognition schemes

- examples of successes in dealing with the various tiers of government that impact on fishers businesses and behaviour
- progress with access security initiatives and co-management processes; and
- capacity building within industry groups.

Current issues for industry

The NIFW participants identified a broad range of issues affecting their industry. Table 3 (Appendix 3) summarises the range of challenges that confront SSIF groups in Australia, as seen by the individuals representing those groups at the workshop.

The identified issues were refined into more focussed lists of the areas that participants considered were negative factors for inshore fisheries. While there is diversity across groups and jurisdictions the shared concerns are shown in Table 4 (Appendix 4). This summarises the key issues that are considered to impact negatively upon the capacity of SSIF.

As the participants worked through their issues it became clear that there are many common issues across SSIF fisheries. Table 5 (Appendix 5) includes examples of initiatives developed by industry groups that could drive benefits for other fisheries if they were adopted more broadly.

The participants further reviewed their thoughts on the range of issues and opportunities identified. It was considered these would form the basis of the outcomes of the NIFW that could be targeted through a revised strategic plan.

Tables 1 and 2 (below) list, in priority order, the key challenges and opportunities identified at the NIFW. Each Table's contents reflect the collective wisdom of those present and may or may not reflect the challenges or opportunities being faced by specific fisheries or organisations. They do reflect the broad perspective of the industry and where their representatives considered benefit would flow to any fishery or industry group / organisation in assisting them to address the fundamental challenges being faced.

Table 1 – Key Challenges

| |
|---|
| Access – maintain / viability / certainty / investment |
| Public Perception – raise profile / political capital / relevance to the community |
| CoOL – Consumer Preference / Seafood Labelling – confidence in purchases |
| Social Acceptance – problems / access security / educate recreational and community |
| Uncertain future – lack of jobs security / electoral cycle |
| Government Regulation – review / remove |
| No Next Generation – families / ease of entry for new entrants |
| Latent effort – a risk to fishers? |

Table 2 – Key Opportunities

| |
|---|
| Industry Working Together – strength / co-ordination |
| Industry Profile – social acceptability |
| Sustainability – fundamental / future |
| Codes of Practice – consistent story |
| Social Responsibility – profile / certainty / trust |
| Branding/Promotion – product differentiation |
| Optimise industry branding – product diversity / selling your story |
| More flexible management – improve diversity / survival |
| Safe seafood – community perception |

Conclusion

Following the review and assessment of the current state of play for Australia's SSIF's, the workshop identified that the following areas were likely to result in the best improvement in situation for those operating in SSIF's:

1. The development of inshore fisheries, including improving access.
2. Increasing profitability, particularly through marketing and the development of new products.
3. Improving social and economic factors, including better ways to value inshore fisheries, recognising their contribution to the regional communities of which they are a key component.
4. The need for improved fisheries management models suited to small scale, multi-species fisheries based upon best practice in co-management and harvest strategy development to improve access security.

In supporting these industry needs, it was agreed to revise the 2008 strategic plan and identify opportunities to support the promotion and delivery of the objectives within that plan through a more co-ordinated industry approach.

In order to improve the outcomes for our SSIF it is important that there is the capacity to work with a wide range of interests, such as a fisheries managers, seafood consumers, other extractive and non-extractive stakeholders, research providers and governments across a diverse range of jurisdictions.

To deliver against the industry's objectives and targeted outcomes it will require the capacity to have a strong and effective voice in driving strategic projects that can enhance the capacity of fishers, as well as, their organisations to support improved governance, communication and capacity building.

The fisheries that were considered to be in need of support under the revised strategic plan are those that are susceptible because of:

- The current trend by governments to redistribute fishery resources away from food production for consumers to non-commercial users; and/or
- Changing access arrangements to deal with conflicts (real or perceived) with the urbanisation of our coastal zone.

In order to focus future activities the key opportunities and challenges were reviewed and assessed to determine what were the most critical areas. Tables 6 and 7 identify the outcomes from the prioritisation process.

In developing a revised strategic plan, it was agreed that Industry's vision for our SSIF is:

"For the diverse and multifaceted small scale inshore fisheries to have an empowered industry, with secure access rights in sustainable fisheries that are recognised as a valuable source of safe fresh food, provided by viable and profitable businesses which are valued by the community."

In order to support the SSIF's in achieving their vision for their future, it was agreed that a National Inshore Fisheries Network (NIFN) should be established. Resourcing of the Network would need to be further developed. The following are key considerations in the Network's structure, role and function:

- Take full account of and use resources from existing industry councils, associations and other established networks to avoid duplication and reduce costs.
- Co-ordinate research projects that deliver outcomes for inshore fisheries consistent with the strategic plan.
- Review and contribute to prioritisation of research and development projects that underpin the future for inshore fisheries through the creation of opportunities such as an FRDC partnership agreement or sub-program or similar arrangement.

- Create a regular process for engaging within the Network.
- Facilitate the adoption of a revised strategic plan and support its promotion and delivery through effective engagement of other interests that support or interact with inshore fisheries.

The revised draft strategic plan gives priority to the following key areas:

- 1) Building industry capacity
- 2) Improved communication
- 3) Industry development

The outcomes that should support and enhance the industry from the strategic plan are:

1) Building industry capacity:

- a) Establish a network to support industry delivering on key messages, through sharing of resources.
- b) Provide training to build the capacity of fishers to participate in co-management in each State (e.g. possible re-development of previous MAC courses - the training could then be of value to other fisheries).
- c) Improve understanding of resource management processes and enhance engagement skills, including at the political level.
- d) Improve representation in resource management processes and develop tools to assist in moving through the co-management continuum towards higher levels of self-management for industry.
- e) Improve capacity to develop and forge strategic alliances that can support the industry.
- f) Build the skills of fishers to support the delivery of key industry messages.

2) Improved communication:

- a) Establish programs that build a resource kit to support communications within industry and with the community.
- b) Ensure sufficient information promoting the role of our small scale inshore fisheries is readily available in order to ensure the industry and its role is understood by politicians and the community.
- c) Identify and develop education material for schools and communities.
- d) Engage in awareness raising through “in-store” retail promotions/marketing of fishery product.

3) Industry development:

- a) Strong and well-defined access rights for inshore fisheries.
- b) Promote the social and economic role of inshore fisheries as part of the national development process.
- c) Adopt long-term strategies to improve access to areas currently closed to inshore fishing on a State by State based approach.
- d) Identify underutilised species as an area of key opportunity for growth.
- e) Promote and expand environmentally friendly gear technology, invented and used by innovative inshore fishers.
- f) Identify, develop and implement strategies for improving the profitability of inshore fisheries through market and product development opportunities.
- g) Identify and deliver on skills and training needed to build fisher's businesses and the capacity of their employees / crew.
- h) Identify strategies to promote the inshore fisheries as a career option.

Implications

The NIFW identified many issues currently compromising the capacity of the industry, and governments, to support and manage SSIF. These issues will continue to bog down industry development, regional growth, food production and fisheries management processes unless some positive actions are taken.

Much energy is expended by governments in responding to:

- Claims over rights and access for recreation and for food production for the broader community;
- Competition between fishing and conservation values;
- A poor understanding of good fisheries management;
- A lack of understanding of the economic and social values that support most small regional communities;
- Misperceptions of the role fisheries management plays in supporting sustainable fish stocks; and
- Maintaining healthy marine or estuarine ecosystem to support fish stocks.

In many cases, interest groups do not place a high value on the messages from government management agencies. A partnership approach between industry and government can strengthen this message and bring about a change in community values.

There are many transaction costs that are built into fisheries management processes which governments could reduce with improved management outcomes, better partnerships and a stronger co-management approach to our fisheries. In most jurisdictions, the management agency's capacity is often diverted into managing a cycle of crises due to the conflict driven processes adopted by competing interests in the commercial, recreational and conservation sectors. Better educated representatives from all of the competing sectors would reduce the resources spent in responding to the crises on behalf of "the community".

Shifting community awareness to better appreciate the role of commercial fisheries, the benefits of its products and the values it brings to the community from an economic and social perspective, should be a shared activity between government and industry. Having a well-resourced industry and a focused industry group that can drive investment in key areas of research and development will improve the outcomes from fisheries management processes and benefits derived from a healthy commercial industry.

Our SSIF provide much of the local product found in regional seafood markets. They are recognised by many in the food service industry for the provenance and quality of their products. Many regional food businesses use local seafood to underpin their regional profile and values. Our SSIF are not always well recognised by those that use these services and value the product, particularly tourists and those who use regional locations to escape the "big cities" and seek a sea-change.

There is much energy and commitment within the various groups that support our SSIF that could be focussed and supported. A stronger focus could bring about a new approach to engaging with communities and to underpin the values the SSIF can bring through their contribution to regional economies and social stability. The creation of a National Inshore Fisheries Network (NIFN) utilising the capacity of existing industry networks would support focusing discussion on areas for improvement in our SSIF.

Through an approach similar to the trend to 'sector focussed' programs the SSIF could benefit from research and development initiatives that build the capacity to deliver improved outcomes to fishers in SSIF. A collective industry approach would support:

- Improved governance;
- Providing advice and direction to better target research;
- Identifying opportunities to grow industry's capacity; Management improvement and partnerships that support co-management.

Recommendations

It is recommended that:

1. The draft strategic plan developed through the National Inshore Fisheries Workshop 2015 be distributed to all industry groups that support or work with Australia's small scale inshore fisheries and ensure that it is well understood by those industry groups.
2. The draft strategic plan and its processes be shared with the Australian Fisheries Managers Forum and fisheries management agencies to inform their understanding of the issues confronting small scale inshore fisheries and improve the capacity to respond to their needs.
3. A process and program be developed to support Small Scale Inshore Fisheries to secure a base from which the draft strategic plan can be progressed.
4. A program for the implementation of the outcomes identified in the draft strategic plan be developed by the National Inshore Fisheries Network.
5. Industry identifies groups that could participate and contribute to a program of supporting a National Inshore Fisheries Network.
6. Industry engages with the Australian Fisheries Managers Forum to co-operate in the development of initiatives on SSIF issues that can drive management and industry improvement programs in all jurisdictions.
7. The National Inshore Fisheries Network and Australian Fisheries Managers Forum develop a framework that can be used as a model for the management and development of all small scale inshore fisheries in Australia.
8. Where there are impediments to investment in research and development from some jurisdictions, the National Inshore Fisheries Network should provide a focus for recognition of the needs for such strategic investment in support of growing our SSIF.

Extension and Adoption

Through this report the NIFW outputs and the draft strategic plan are to be provided to all industry bodies that support SSIF, as well as, relevant fisheries management agencies. This should drive a focussed discussion within these groups over the needs for the development of a shared platform from which a discussion can commence between the industry and government over actions and activities that can progress the strategic outputs from the plan.

A summary of the NIFW outputs will be provided to all industry bodies for use in their communication programs with licence holders within their jurisdictions. While the initiatives from this process require a high level of industry leadership, it will be necessary to engage fishers more broadly in the initiative and its purpose. Any future investment of resources or funds in a program to support the plan will need to ensure it has broad support from those that would provide the funding to support such activities. Strategic investment to drive some of the initiatives will be necessary whether at a local, regional, state or national level.

The AFMF has already begun to consider how it can better manage and engage our SSIF through an FRDC funded workshop in 2014. With this first step it is important to share these workshop outcomes with the AFMF in order to enhance the work they have started in supporting a place for our SSIF. Regardless, strengthening the relationships and building more effective partnerships between managers and industry will be important in supporting changes into the future.

Project coverage

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Appendix 1 – Project Staff

| | | |
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Appendix 2 - References

Joll, L, Cartwright, I, Sloan, S, (2015) Australian Fisheries Managers Forum Fisheries Management Workshop Adelaide 26th and 27th March 2014 (FRDC 2013/235) (WADoF FOP No. 119)

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Seafish United Kingdom – Risk Assessment for Sourcing Seafood (RASS) - <http://www.seafish.org/rass/>

Walking Fish a North Carolina Co-operative, Community supported fishery scheme - <http://walking-fish.org/>

Appendix 3 – Key issues

Table 3 – Summary of key issues and opportunities by participants NIFW 2015

| | |
|-----------|--|
| Fisher 1 | <ul style="list-style-type: none"> • Over-regulated and mismanaged • Regulations make running a business difficult • Licence costs escalated – commercial sector bearing most of the costs • Little public profile – promotion poor due to lack of funds • No-one interested in taking on a fishing future • Hindrance to innovation • Tourism trade growing • No knowledge transfer between fishers |
| Fisher 2 | <ul style="list-style-type: none"> • No united front – weakens position • Future for fishery uncertain • Entry affordability • Prices going up |
| Fisher 3 | <ul style="list-style-type: none"> • Good to get industry together • Pressure from reviews etc. • Peak body important • Competition from aquaculture and imports |
| Fisher 4 | <ul style="list-style-type: none"> • Negative perception of the net fishery – needs to change |
| Fisher 5 | <ul style="list-style-type: none"> • Recreational pressure • Fisheries laws need updating • Algal bloom/environmental conditions • Ownership of licence |
| Fisher 6 | <ul style="list-style-type: none"> • Mental stress • Marine parks • Harbour theft • Family |
| Fisher 7 | <ul style="list-style-type: none"> • Need security and property rights/ preference for recreational fishers • Need incentive for youth to enter the industry • Needs to be out of the political arena • Education/awareness/ schools program |
| Fisher 8 | <ul style="list-style-type: none"> • Resource Access • Reactive not Proactive and proud • Political savvy – need to play the game • Need united front on State and National Level • Co-ordination of media messages • National baseline data • Fishers’ vs food producers |
| Fisher 9 | <ul style="list-style-type: none"> • Lack of community identity and engagement • Remove politics • Focus on identity – niche product |
| Fisher 10 | <ul style="list-style-type: none"> • Apathy of industry • Government needs to finalise review • Continuing threats to future • Drought affecting sustainability |
| Fisher 11 | <ul style="list-style-type: none"> • No more closures • New Zealand fur seal (NZFS) problem • Split between net and cockle fishers • Recreational pressure • Adjusted water flows with industry input • Fish abundance improved • Government relief – licence fees and different gear |

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| Fisher 12 | <ul style="list-style-type: none"> • Fishery under review – uncertain future • Good sustainable fishery – zero by-catch • Association working well |
| Fisher 13 | <ul style="list-style-type: none"> • Access • Non-compliant recreational sector |
| Fisher 14 | <ul style="list-style-type: none"> • Uncertain future – fishery under review • Black market – non-compliance |
| Fisher 15 | <ul style="list-style-type: none"> • Chinese market has opportunities • Shark numbers causing problems |
| Fisher 16 | <ul style="list-style-type: none"> • Increasing effort by recreational fishers • Shrinking fishery • Department should be statutory body to avoid political interference • Common property resources • Outnumbered by recreational fishers • Minister not listening • Education required • Lack of funding for science • Aquaculture takes preference |
| Fisher 17 | <ul style="list-style-type: none"> • Localised depletion • New management arrangements • Good FRDC project on periwinkles • Should remove latent effort |
| Fisher 18 | <ul style="list-style-type: none"> • Reform happening – industry divided • Country of Origin labelling failed • Black market issues • Social licence/ sharing issues • Compliance not supportive of industry • Access maintenance • AMSA regulation • Sustainable fishery • Master Fisherman’s Project |
| Fisher 19 | <ul style="list-style-type: none"> • Major closures – balance gets upset • Treatment by govt. unfair and causes domino effect • Garfish closures causes imports to infiltrate markets • Labelling laws important |
| Fisher 20 | <ul style="list-style-type: none"> • Recreational fishers have too much influence • Code of Practice developed |
| Fisher 21 | <ul style="list-style-type: none"> • Fishery under review • Problems with recreational sector/increasing participation • Need resource shares |
| Fisher 22 | <ul style="list-style-type: none"> • Mental health • Effective promotion • Preservation of history • Benefits of eating |
| Fisher 23 | <ul style="list-style-type: none"> • Access to grounds/stocks • Social licence • Demonstrating sustainability • Safe / nutritious / healthy • Using underutilised / under-valued species • Lot of value-adding happening • Changing demands • Politics – alignment with National Farmers Federation? |

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| Fisher 24 | <ul style="list-style-type: none"> • Access / profile important • Incorporate indigenous issues • Adequate data not everything • Need to create good linkages • Country of Origin labelling • Need better valuation of fisheries • Innovation stifled |
| Fisher 25 | <ul style="list-style-type: none"> • Aboriginal access arrangements – sacred sites protected • Fisher’s catch and effort returns being used to close most productive areas • Commercial licences declining • Code of Practice – EMS • Resource share identified in some fisheries • Quota providing protection |
| Fisher 26 | <ul style="list-style-type: none"> • Security of access • Divided industry needs to be united • Trust issues – broken promises • Pride / respect easy targets • Environmental impacts – RAF – no compensation • Distant relationship with community • Communication strategy • Anti-theft Mud Crab workshop |

Appendix 4 – Key Negative Factors

Table 4 – Key Negative factors impacting SSIF

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|---|
| Access security / certainty, access issues, access rights |
| Social acceptance – conflict with rec fishers, pride, social responsibility |
| No central industry narrative |
| Correct or change management, too much government interference |
| Government regulation |
| Loss of access leading to a diminished industry |
| No Country of Origin Labelling (CoOL) |
| No next generation |
| Latent effort |
| Threat from recreational fishers |
| Closures / uncertainty of access |
| Politicians |
| Public perceptions of fishers |
| Uncertain financial future |
| Zoning |
| Peak body – potential not to be good |
| Labelling (aquaculture v wild caught v CoOL) |

Appendix 5 – Key Opportunities

Table 5 – Key Areas of opportunity or success for SSIF

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|--|
| Broad understanding of inshore fisheries by community / Profile raising for industry |
| Industry working together |
| Stronger political representation |
| Safe seafood (quality) |
| Change of government |
| Fisher's situation improved |
| Code of practice (all Inshore Fisheries) |
| Link to National Farmers Federation / United voice |
| Get the public to consider new products / markets |
| Price up / Demand up |
| History of sustainability |
| More flexible arrangements |
| Reduce fees in bad times |
| Sustainability |
| Optimise branding (CoOL) |
| Opportunity to prove social responsibility |

Appendix 6 – Strategic Plan 2015

A STRATEGIC PLAN FOR AUSTRALIA'S INSHORE FISHERIES

(DRAFT)

2015

This Plan builds upon the first Plan developed in 2010 following a workshop and a subsequent process of engagement with a range of fishery sector groups across Australia. It has been refined through a workshop held in Sydney in October 2015.

The Plan identifies and provides targeted outcomes that could address a range of issues that are confronting our Nation's diverse inshore fisheries. The small scale inshore fisheries include groups that operate within an environment that leads to competition for resources with other extractive and non-extractive users of our marine resources. Australian inshore fisheries are generally, but not exclusively, small scale operations in multi-species fisheries. Importantly, they supply a major portion of Australia's domestic fresh local seafood. This provides significant employment and income that supports many smaller regional communities throughout Australia.

The Nation's inshore fishery industries are seeking to identify and undertake activities that will emphasise:

1. The development of inshore fisheries, including i) improving access (e.g. re-opening of some closed areas), and ii) increasing profitability, particularly through marketing and the development of new products.
2. Improving social and economic factors, including better ways to value inshore fisheries, recognising their contribution to the regional communities of which they are a key component.
3. The need for improved fisheries management models suited to small scale, multi-species fisheries based upon best practice in co-management and harvest strategy development to improve access security.

The Vision for the Industry

The Industry's vision for our small scale inshore fisheries is:

“For the diverse and multifaceted inshore fisheries to have an empowered industry, with secure access rights in sustainable fisheries that are recognised as a valuable source of safe fresh food, provided by viable and profitable businesses which are valued by the community.”

The Mechanism to Deliver the Future for the Industry

To support the Nation's inshore fisheries a National Inshore Fisheries Network should be established.

The following are key considerations in the Network's structure, role and function:

1. Seek funding for an initial 5 years, to support the establishment and assist with the development of an effective and viable industry network to support the delivery of outcomes for the Nation's inshore fisheries consistent with this Plan;
2. Review and contribute to the prioritisation of research and development projects that underpin the future for inshore fisheries through options such as an FRDC Partnership agreement or Sub-program;
3. Co-ordinate research projects and deliver outcomes for inshore fisheries consistent with this Plan;
4. Take full account of and use resources from existing industry councils, associations and other established networks to avoid duplication and reduce costs;
5. Establish a Network executive consisting of two people from each State with allowance for proxies;
6. Create a regular process for engaging within the Network;
7. To facilitate the adoption of this Plan and support its promotion and delivery through effective engagement of other interests that support or engage with inshore fisheries.

Key Opportunities and Challenges

At a workshop in Sydney in October 2015 the participants, from a wide range of inshore fisheries across Australia, identified the following areas of opportunities and challenges and the priorities to be addressed to support small scale inshore fisheries against the previous National Inshore Fisheries Strategic Plan (2010). These key opportunities and challenges have been considered against a range of objectives and outcomes that can assist the inshore fisheries. These Objectives are in-line with areas for development of fisheries management outcomes identified through a fisheries management workshop undertaken by the Australian Fisheries Management Forum (FRDC Project No. 2013/235).

In order to improve the outcomes for our small scale inshore fisheries it is important that there is the capacity to work with a wide range of interests, such as a fisheries managers, seafood consumers, other extractive and non-extractive stakeholders, research providers and governments across a diverse range of jurisdictions. To begin such a process will require the industry to have a strong and committed program for ongoing engagement and the ability to oversee and plan for programs and activities that enhance our fisheries management outcomes and capacity to communicate to the community.

To deliver against the industry’s objectives and targeted outcomes it will require the capacity to have a strong and effective voice in driving strategic projects that can enhance the capacity of fishers and their organisations to support improved governance, communication and capacity building.

| Key Opportunities | Score |
|--|-------|
| Industry Working Together – strength/co- | 84 |
| Industry Profile – social acceptability | 40 |
| Sustainability – fundamental/future | 25 |
| Codes of Practice – consistent story | 25 |
| Social responsibility – profile/certainty/trust | 24 |
| Branding/Promotion – product differentiation | 20 |
| Optimise Branding – product diversity – selling your story | 19 |

| Key Challenges | Score |
|---|-------|
| Access – maintain/viability/certainty/investment | 99 |
| Public Perception – raise profile/political capital/relevance to the community | 78 |
| Country of Origin Labelling (CoOL) – Consumer Preference/ Seafood Labelling – confidence in purchases | 56 |
| Social Acceptance – problems/access security/educate recreational and community | 35 |
| Uncertain future – lack of jobs security/electoral cycle | 18 |
| Government Regulation – review/remove | 13 |
| No Next Generation – families/ease of entry for new entrants | 1 |

A Plan for the Development of Australia’s Inshore Fisheries

The fisheries that are considered to be in need of support under this Plan are those that are susceptible because of–

- the current trend by governments to redistribute fishery resources away from food production for consumers to non–commercial users; and/or
- changing access arrangements to deal with conflicts (real or perceived) with the urbanisation of our coastal zone which has promoted the concept that these fisheries are incompatible with the “sea change” movement, increasing demands for conservation and needs of modern communities.

This Plan gives particular, but not exclusive, attention to the following three key areas

- (1) The development of inshore fisheries, by improving access security and increasing profitability, particularly through marketing and the development of new species or products.

- (2) Improved management models suited to small scale multi-species fisheries, including co-management processes and the use of harvest strategies that underpin stable and recognised resource shares.
- (3) Build the skills of fishers and others in the industry to support their capacity to better engage in management and community processes.

The objectives from the previous Plan were still considered to be appropriate to focus future activities. Consideration was given to the following key outcomes that would support building the capacity of our inshore fisheries to meet the Plan’s objectives.

| OBJECTIVES | OUTCOMES |
|-------------------------|--|
| Build Industry Capacity | <p>Establish a network to support industry delivering on key messages, through sharing of resources</p> <p>Provide training to build capacity of fishers to participate in co-management in each state (e.g. possible re-development of previous MAC courses - the training could then be of value to other fisheries).</p> <p>Improved understanding of resource management processes and enhance engagement skills, including at the political level.</p> <p>Improved representation in resource management processes and the development of tools to assist in moving through the co-management framework towards high levels of self-management for industry.</p> <p>Improved capacity to develop and forge strategic alliances that can support the industry</p> <p>Build the skills of fishers to support the delivery of key industry messages</p> <p>Investigate a database of case histories and information for sharing which would provide an opportunity for inshore fishers to learn from others.</p> |
| Improved Communications | <p>Establish programs that build a resource kit to support communications within industry and with the community</p> <p>Ensure sufficient information in the form of fact sheets is ready available to, and is understood by, politicians and the community promoting the role of our inshore fisheries.</p> <p>Identify and develop education material for schools and communities</p> <p>Awareness raising through “in-store” retail promotions/marketing of fishery product</p> <p>A profile and promotion program for the industry’s products as “local, sustainable and healthy”</p> |

| | |
|-----------------------------|---|
| <p>Industry Development</p> | <p>Strengthen secure and well defined access rights for inshore fisheries</p> <p>Promote the social and economic role of inshore fisheries as part of the national development process</p> <p>Adopt long-term strategies to improve access to areas currently closed to inshore fishing on a State by State based approach</p> <p>Promote industry product through more innovative packaging and products</p> <p>Assess supply chain options and strategies to build the value of product</p> <p>Identify underutilised species as an area of key opportunity for growth</p> <p>Promote and expand environmentally friendly gear technology, invented and used by innovative inshore fishers</p> <p>Identify, develop and implement strategies for improving the profitability of inshore fisheries through market and product development opportunities.</p> <p>Identify and deliver on skills and training needed to build fisher’s businesses and the capacity of their employees/crew</p> <p>Identify strategies to promote the inshore fisheries as a career option.</p> |
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