RIDGE PARTNERS
CONSULTANTS AND ADVISERS

SEAFOOD INDUSTRY
ORGANISATIONAL CAPABILITY REVIEW

FRDC 2018-195: Industry capability and mapping report and workshop

A Final Report to

Seafood Industry Australia / Fisheries R&D Corporation

April 2019

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1. Introduction

Background

In 2018 the Australia Seafood Industry established a national peak industry body – Seafood Industry Australia (SIA). SIA's charter is to manage issues of national significance to the seafood industry.

The current functional capability (staff, funding, systems, networks) of the SIA organisation is limited as it establishes itself as the leader in a new national seafood industry governance structure. In this early stage SIA is significantly reliant on its members and seafood stakeholders, whose existing capacity and capability range widely across many seafood issues. However, several existing mature seafood organisations have developed and now hold significant professional capability in key areas relevant to their respective needs and to SIA's charter.

The following points summarise the project brief and objectives.

a. What is the Problem?

- The Australian seafood industry (commercial wild catch fishers, aquaculture farmers, and seafood partners) is geographically large, and diverse in fisheries, species, jurisdictions and markets.
- Diversity is fundamental to seafood enjoyment. But diversity also demands many organisations to run our industry - each with unique capacity (resources, funds, skills), capability (networks, strategies motivations) and services to members.
- The Problem for the seafood industry is that no single seafood organisation has the capacity, capability or networks to address the big issues we all seafood organisations.
- In 2018 Industry stepped up and established SIA to resolve this diversity problem and lead the industry on the big national issues.
- The SIA Board charter is - to lead, identify, manage, and prosecute national policies and issues on our behalf to best long-term advantage for Industry members. Key FUNCTIONS have been established as the delivery platforms.
- The range of national challenges industry faces is large and growing. And SIA alone does not have the inhouse resources, capacity or capability to address this problem or implement preferred solutions.
- But collectively through sharing our state and sectoral resources in a national partnership we can access considerable capacity to mount solutions to the challenges we face.

b. What is the Impact of the Problem?

- Fragmented capacity leads to suboptimal performance and service delivery. Important seafood issues cannot and will not get managed or resolved to best advantage for the industry.
- And service benefits to members is not yet on our radar. Other industries (meat, dairy, horticulture) have built structures to leverage services dividends (safety, insurance, bulk buying) for members. We should be doing this.
- Every day an issue goes unmanaged or a service opportunity unleveraged, means loss of social and economic capital by seafood operators.

c. What Resources are available?

- As a "national seafood industry" we include all commercial participants in our whole value chain, both in and out of the water. We all benefit if this chain can be made more efficient, resilient and responsive to markets and opportunities.
- The Australian seafood industry has deep and unique resources, capacities and capability. These are variously held in the hands of individual seafood organisations across Australia. The scope of our organisations is deep and wide.
- This capacity and capability is manifest as skilled people and experts, industry and sectoral management systems, technology and financial resources, industry knowledge, and networks with industry, agencies and external parties.

d. What is Proposed Now?

- SIA will map and lead member organisations to build joint capability in two ways:
  - 1. Identify the functions and services to be delivered at a national and regional level across the industry.
  - 2. Work out how to deliver these functions using existing capacity and capability contributed by industry.
- A joint FUNCTIONAL CAPABILITY approach will identify organisations with a LEAD Capability ("3" below), relevant SUPPORT Capabilities ("2"), and PARTICIPANTS ("1").

- A joint SERVICE INFRASTRUCTURE approach should only create a new seafood service where it delivers a compelling financial and economic advantage to the seafood industry.

e. Objectives

The objective of this project is to: (to be confirmed)

- Map the organisational capacity and capability based on consultation with leading seafood organisations,
- Provide data to FRDC and SIA regarding the assessment of capability options for SIA,
- Establish a spreadsheet tool to enable ready updating and analysis of seafood functions in the future.

Methodology

This project has been established by SIA and FRDC to engage with ~40 leading seafood organisations regarding their capacity and capability. The project has documented their current capacity and capability across a range of existing and emerging seafood risks and challenges. The project has been conducted by Ewan Colquhoun from Ridge Partners, an independent consulting firm, based on brief telephone interviews in April 2019.

a. Functional Areas

The review and consultation have been untaken based on an optimum template of functions that a capable seafood organisation would undertake in servicing its members. The range of these functions is dynamic, based on the variability of key seafood industry risks and related issues over time.

Of course, organisation must balance their capability and functional service delivery against available financial and other resources, and available time to implement the services. All organisations noted in discussion that they could do a lot more functions if they had more resources and time.

The review anticipated consultations with the Recreational and Indigenous Fishing sectors, as they are fellow fishery users of the aquatic resource. Contact with these organisations has not yet been possible.

The functions chosen for this report have been established to cover the range of organisations that exist in the industry and the service environment they support. As presented in the table above, the key organisations consulted have been classed under four headings according to their dominant service contracts: Peak Body; Seafood jurisdiction; FRDC-IPA; Key Fishery; and National Issue Leaders.

Thirty-six discrete seafood organisation Functional Areas have been identified based on discussion with FRDC, SIA and industry organisations. This is a starting list and can be amended and improved subject to industry refinement. These areas have been assembled under six headings:

1. Sustainable Aquatic Environment
    a. Aquatic environment
    b. Marine species and status
    c. Animal health
    d. Biosecurity
    e. Climate change
2. Community Endorsement of Seafood Industry
    a. Community engagement and perception
    b. Recreational community relations
    c. Indigenous community relations
    d. Industry Public Relations and Image Promotion

3. Resource Allocation, Access and Use

   a. Resource access
   b. Marine Oil & Gas interface
   c. Marine parks
   d. IUU Fishing in Australian waters
   e. Harvest processing and viability
   f. Digital technology – radio, logbooks, VMS, etc

4. Human Capacity

   a. Leadership and skills
   b. Employment and labour relations
   c. Work safety
   d. Mental health

5. Seafood Supply, Markets and Trade

   a. Seafood product standards
   b. Domestic supply and access
   c. Domestic marketing and promotion
   d. Export market supply and access
   e. Export marketing and promotion
   f. Import supply and access
   g. Import marketing and promotion
   h. Seafood freight and logistics
   i. Aquatic animal welfare
   j. Country of Origin labelling
   k. Seafood safety
   l. Communication of status and risk

6. Industry RD&E

   a. Industry strategy and planning
   b. Precompetitive industry investment
   c. Industry productivity
   d. Liaison and reporting to Government and others
   e. International networks and 3rd Parties.

These functional areas have been adjusted and progressively refined based on advice from seafood industry participants. Further discussion, amendment and refinement is necessary to enable a clear and concise portfolio of functions in the joint hands of SIA and seafood organisations. In many cases these refinements are expressed as specific issues and risks (e.g. social license, fuel tax credits) that are faced by the industry. These specific issues have been identified where relevant in the analysis below.

b. Organisational Responses

Each organisation was consulted via a 15-20 minute phone conversation regarding their existing organisational resources, capability and options. Data was recorded and collated onto a common data based, then used for analyses. No organisation requested that its information be kept confidential by the consultant.

Organisations ranked their capacity and capability on a score (high / medium / low) according to the following standard:

- 3 = Capability and desire to jointly **lead** with SIA on a specific function at a national level,
- 2 = Capability and desire to **support** SIA and seafood organisations in managing a specific function at a national level,
- 2 – Capability and desire to **participate** with SIA and seafood organisations in a national functional area.

c. Data Limitations

Care should be taken in reviewing this data.

The range of capacities, capabilities and risks, across the seafood industry organisational landscape is very broad. Establishing a 36-point score card that accurately captures all the capabilities of 40 or more organisations is quite a challenge.

This data is "raw" as expressed by respondents. It has not been normalised across sectors, fisheries or jurisdictions. For example, one organisation may perceive a higher baseline rating for a score of 2 than another organisation choosing a score of 2. Interpretation of this data should be undertaken with care.

d. Key Issues

1. SIA Leverage

All organisations contributing to this project to date have verbally confirmed (to the consultant) their aspiration and support for a better, stronger SIA, for the mutual benefit of all seafood organisations and stakeholders. But many also noted that if they had more resources ($, FTEs, etc) locally they could do more and deliver better outcomes for their stakeholders.

So, the question has arisen as to the scale and scope of the additional synergies and leverage that SIA can achieve regarding difficult seafood issues. Why would a regional or fishery seafood organisation join with SIA if they perceive they can resolve their issue locally quicker and at lesser margin cost?

Clearly some high-level issues (e.g. social license, animal health, biosecurity) are far better addressed at a national level where media, legislation or national impacts reside. But for other issues, many organisations want a clearer understanding of the national priorities SIA will address, how SIA will recognise and remunerate contributions from seafood organisations, and how the benefits of scale and national leverage will flow to local organisations. The boundaries (both management and resourcing) between national and local issues need to be discussed and agreed.

2. Who Pays?

A frequent question raised by respondents relates to who will pay the costs for individual organisations that jointly lead or support SIA on national issues.

An organisation with a national capability (e.g. WAFIC for 3rd party accreditation; STAG for China FTAs, SafeFish for seafood safety) should not be expected to foot the total national cost of their contributed human capacity and resources to assist SIA.

A funding equity formula must be on the agenda for the upcoming seafood organisation workshop.

3. Transporting the Capability

Specific knowledge of key risks and related functions is one common asset possessed by seafood organisations. For each organisation these capabilities are finetuned to address local risks and achieve local outcomes.

But the utility of those unique organisational capacities and capabilities may diminish when transferred to a national context that is subject to different governance structures and challenges. As one leading organisation noted, the capability to do things outside their local remit is often very limited.

SIA therefore needs to work with members and seafood organisations to ensure the optimum transportability of mature local capabilities to a national stage.

2. Seafood Organisation Capability

List of Organisations

Responses from Seafood Industry organisations confirm the following financial and staff capacities, and entity structures. Some organisations have not yet been able to respond due to other commitments.

Industry Group			Association Name	Operating Budget p.a.	No. of FTEs	Entity type	Consultation Status
Peak	1	SIA	Seafood Industry Australia	$500k-$1m	0-2	Incorporated Assn	
Jurisdictional Bodies	2	NAC	National Aquaculture Council	$250-500k	0-2	Incorporated Assn	Complete
	3	QSIA	QLD Seafood Industry Assn	$50-100k	0-2	Incorporated Assn	Complete
	4	NSWPFA	NSW Professional Fishermens Assn	$250-500k	0-2	Incorporated Assn	Complete
	5	SIV	Seafood Industry VIC	$250-500k	0-2	Incorporated Assn	Complete
	6	TSIC	TAS Fishing Industry Council;	$500k-$1m	3-5	Incorporated Assn	Complete
	7	WFSA	Wildcatch Fisheries SA	$100-250k	0-2	Incorporated Assn	Complete
	8	WAFIC	WA Fishing Industry Council	>$1m	>10	Incorporated Assn	Complete
	9	NTSC	NT Seafood Council	$500k-$1m	0-2	Incorporated Assn	Complete
	10	CFA	Commonwealth Fisheries Assn				
FRDC - Industry Partnerships	11	AAGA	Australian Abalone Growers Assn	$50k-$100k	0-2	Incorporated Assn	Complete
	12	ACA	Abalone Council Australia				
	13	ABFA	Australian Barramundi Farmers Assn	$250-$500k	0-2	Incorporated Assn	Complete
	14	ACPF	Australian Council of Prawn Fisheries	$50k-$100k	0-2	Incorporated Assn	Complete
	15	APFA	Australian Prawn Farmers Assn	$100-250k	0-2	Incorporated Assn	Complete
	16	ASBTIA	Australian Southern Bluefin Tuna Assn	$500k-$1m	3-5	Incorporated Assn	Complete
	17	OA	Oysters Australia	$50k-$100k	0-2	Incorporated Assn	Complete
	18	PPA	Australian Pearl Producers Assn	$250-$500k	0-2	Incorporated Assn	Complete
	19	SRL	Southern Rocklobster Ltd	$500k-$1m	0-2	Incorporated Assn	Complete
	20	TSGA	TAS Salmon Growers Assn				
	21	WRLC	Western Rocklobster Council				
Other Key Fisheries	22	TA	Tuna Australia	$100-$250k	0-2	Incorporated Assn	Complete
	23	SETFIA	South East Trawl Fishing Industry Assn				
	24	SGWCPA	Spencer Gulf & West Coast Prawn Assn				
	25	QSMA	QLD Seafood Marketers Assn				
	26	SFA	Southern Fishermens Assn	$100-$250k	0-2	Incorporated Assn	Complete
	27	VRLA	VIC Rocklobster Assn	<$50k	0-2	Incorporated Assn	Complete
	28	TACL	TAS Abalone Council Ltd	$250-$500k	0-2	Incorporated Assn	Complete
	29	TRLFA	TAS Rocklobster Fishermens Assn				
	30	AAA	Abalone Assn of Australasia				
	31	ACWA	Aquaculture Council of WA	$50-$100k	0-2	Incorporated Assn	Complete
National Issue Leaders	32	SafeFish	National Food safety Initiative	$250-$500k	0-2	Incorporated Assn	Complete
	33	STAG	Seafood Trade Advisory Group	$100-$250k	0-2	Project Group	Complete
	34	SFM	Sydney Fish Market	>$1m	>10	Private Company	Complete
	35	SIAA	Seafood Importers Assn of Australasia	$100-$250k	0-2	Incorporated Assn	Complete
	36	Corporate	Leading seafood companies				
	37	SeSAFE	National Work safety Initiative				
	38	Ocean Watch	National seafood Sustainability Initiative	$500-$1m	6-10	Charity	Complete
	39	WISA	Women in Seafood Australasia	<$50k	Volunteer	Incorporated Assn	Complete
Other	40	ARFF	Australian Recreational Fishing Foundation				
	41	IRG	Indigenous Reference Group of the FRDC				

Based on estimated midpoints for the financial and staff resources in the table above, the Seafood Industry has an aggregate annual operating budget of ~$14 million and 78 FTEs.

Functions

a. Sustainable Aquatic Environment

		1. Sustainable Aquatic Environment				
		a. Aquatic Environment	b. Marine Species and Status	c. Animal Health	d. Biosecurity	e. Climate Change
	Key Issues	Incident response	CITES, TEPS, COPS, NPDA, DEE NEPS			
Peak	SIA	0	0	3	3	0
Seafood Jurisdictions	NAC	3	2	3	3	3
	QSIA	0	0	3	3	0
	NSWPFA	2	2	2	2	2
	SIV	2	2	2	2	2
	TSIC	2	2	2	2	2
	WFSA	0	0	0	0	0
	WAFIC	0	0	0	0	0
	NTSC	1	1	1	1	1
	CFA	0	0	0	0	0
FRDC - Industry Partnerships	AAGA	0	0	3	3	1
	ACA	2	2	2	2	2
	ABFA	1	0	3	3	0
	ACPF	0	0	0	0	0
	APFA	1	0	1	0	0
	ASBTIA	3	3	3	3	3
	OA	2	0	3	3	2
	PPA	3	3	3	3	3
	SRL	2	2	3	2	2
	TSGA	0	0	0	0	0
	WRLC	0	0	0	0	0
Other Key Fisheries	TA	2	3	0	0	2
	SETFIA	0	0	0	0	0
	SGWCPA	0	0	0	0	0
	QSMA	0	0	0	0	0
	SFA	2	1	2	2	1
	VRLA	1	1	2	1	0
	TACL	2	2	2	3	1
	TRLFA	0	0	0	0	0
	AAA	0	0	0	0	0
	ACWA	1	0	1	1	0
National Issue Leaders	SafeFish	2	0	0	0	2
	STAG	0	0	0	0	0
	SFM	2	2	2	2	3
	SIAA	0	0	0	0	0
	Corporate	0	0	0	0	0
	SeSAFE	0	0	0	0	0
	Ocean Watch	3	2	2	2	2
	WISA	0	0	0	0	0

b. Community Endorsement of Seafood Industry

		2. Community Endorsement of Seafood Industry			
		a. Community Engagement & Perception	b. Recreational Community Relations	c. Indigenous Community Relations	d. Industry PR & Image Promotion
	Key issues	Social license			
Peak	SIA	3	0	0	0
Seafood Jurisdictions	NAC	3	0	0	1
	QSIA	2	0	0	0
	NSWPFA	3	2	2	2
	SIV	3	0	2	3
	TSIC	3	2	2	2
	WFSA	3	0	0	3
	WAFIC	2	1	2	
	NTSC	2	2	3	2
	CFA	0	0	0	0
FRDC - Industry Partnerships	AAGA	1			0
	ACA	2	1	1	1
	ABFA	1	0	0	2
	ACPF	3	1	1	3
	APFA	1	0	0	1
	ASBTIA	1	3	2	1
	OA	1	1	1	2
	PPA	3	2	2	1
	SRL	3	2	1	0
	TSGA	0	0	0	0
	WRLC	0	0	0	0
Other Key Fisheries	TA	2	2	0	2
	SETFIA	0	0	0	0
	SGWCPA	0	0	0	0
	QSMA	0	0	0	0
	SFA	2	1	1	1
	VRLA	2	1	0	2
	TACL	2	1	1	1
	TRLFA	0	0	0	0
	AAA	0	0	0	0
	ACWA	1	1	1	1
National Issue Leaders	SafeFish	0	0	0	0
	STAG	0	0	0	0
	SFM	3	2	2	3
	SIAA	0	0	0	0
	Corporate	0	0	0	0
	SeSAFE	0	0	0	0
	Ocean Watch	3	2	2	2
	WISA	3	1	1	1

c. Resource Allocation, Access & Use

		3. Resource Allocation, Access & Use					
		a. Resource Access	b. Marine Oil & Gas Interface	c. Marine Parks	d. IUU Fishing in Australian waters	e. Harvest, Processing & Viability	f. Digital Technology - radio, logbooks, VMS
	Key issues		APPEA / Seismic			Fuel Tax, Minor Use Permits	Blockchain
Peak	SIA	3	3	0	0	3	0
Seafood Jurisdictions	NAC	3	3	2	1	1	1
	QSIA	0	0	1	0	2	0
	NSWPFA	2	1	2	2	2	1
	SIV	2	3	1	1	2	3
	TSIC	2	3	2	2	2	3
	WFSA	0	0	2	0	0	2
	WAFIC	2	3	2	0	0	0
	NTSC	1	2	2	1	1	2
	CFA	0	0	0	0	0	0
FRDC - Industry Partnerships	AAGA	0	0	0	0	1	0
	ACA	2	1	1	1	2	2
	ABFA	2	0	1	0	1	0
	ACPF	0	0	0	0	0	0
	APFA	0	0	0	0	1	0
	ASBTIA	3	3	2	3	1	1
	OA	1	1	0	0	2	0
	PPA	3	3	3	1	1	1
	SRL	3	3	3	0	0	3
	TSGA	0	0	0	0	0	0
	WRLC	0	0	0	0	0	0
Other Key Fisheries	TA	3	2	3	1	3	3
	SETFIA	0	0	0	0	0	0
	SGWCPA	0	0	0	0	0	0
	QSMA	0	0	0	0	0	0
	SFA	1	0	1	1	1	1
	VRLA	3	3	2	0	1	3
	TACL	3	1	1	1	2	2
	TRLFA	0	0	0	0	0	0
	AAA	0	0	0	0	0	0
	ACWA	1	0	0	0	0	0
National Issue Leaders	SafeFish	0	0	0	0	0	0
	STAG	0	0	0	0	0	0
	SFM	2	0	2	0	2	3
	SIAA	0	0	0	0	2	0
	Corporate	0	0	0	0	0	0
	SeSAFE	0	0	0	0	0	0
	Ocean Watch	1	1	1	1	1	1
	WISA	0	0	0	0	0	0

d. Human Capacity

		4. Human Capacity			
		a. Leadership and Skills	b. Employment and Labour Relations	c. Work Safety - harvest & postharvest	d. Mental Health
	Key issues	PIEFA			
Peak	SIA	0	0	3	3
Seafood Jurisdictions	NAC	2	2	2	2
Seafood Jurisdictions	QSIA	3	0	0	2
Seafood Jurisdictions	NSWPFA	3	1	2	1
Seafood Jurisdictions	SIV	3	1	1	2
Seafood Jurisdictions	TSIC	2	2	2	2
Seafood Jurisdictions	WFSA	0	3	0	3
Seafood Jurisdictions	WAFIC	3	0	0	2
Seafood Jurisdictions	NTSC	2	0	1	0
Seafood Jurisdictions	CFA	0	0	0	0
FRDC - Industry Partnerships	AAGA	1	1	1	0
FRDC - Industry Partnerships	ACA	2	3	3	2
FRDC - Industry Partnerships	ABFA	2	1	2	1
FRDC - Industry Partnerships	ACPF	3	1	2	1
FRDC - Industry Partnerships	APFA	1	2	1	1
FRDC - Industry Partnerships	ASBTIA	1	3	3	2
FRDC - Industry Partnerships	OA	1	0	0	0
FRDC - Industry Partnerships	PPA	0	1	2	1
FRDC - Industry Partnerships	SRL	1	0	3	3
FRDC - Industry Partnerships	TSGA	0	0	0	0
FRDC - Industry Partnerships	WRLC	0	0	0	0
Other Key Fisheries	TA	2	3	2	2
Other Key Fisheries	SETFIA	0	0	0	0
Other Key Fisheries	SGWCPA	0	0	0	0
Other Key Fisheries	QSMA	0	0	0	0
Other Key Fisheries	SFA	1	1	1	2
Other Key Fisheries	VRLA	1	0	1	2
Other Key Fisheries	TACL	2	3	3	2
Other Key Fisheries	TRLFA	0	0	0	0
Other Key Fisheries	AAA	0	0	0	0
Other Key Fisheries	ACWA	1	1	1	1
National Issue Leaders	SafeFish	2	0	0	0
National Issue Leaders	STAG	0	0	0	0
National Issue Leaders	SFM	3	3	3	3
National Issue Leaders	SIAA	0	0	0	0
National Issue Leaders	Corporate	0	0	0	0
National Issue Leaders	SeSAFE	0	0	3	0
National Issue Leaders	Ocean Watch	2	0	2	2
National Issue Leaders	WISA	1	1	1	3

e. Seafood Supply, Markets & Trade

		5. Seafood Supply, Markets and Trade											
		a. Seafood Product Standards	b. Domestic Supply & Access	c. Domestic Marketing & Promotion	d. Export Market Supply & Access	e. Export Mkt & Promotion	f. Import Supply &	g. Import Mkt & Promotion	h. Freight & Logistics	i. Aquatic Animal Welfare	j. Country of Origin Labelling	k. Seafood Safety	l. Communication of Status & Risk
	Key issues	Fish names, CODEX, COFI	IAFI, GFSI, FSANZ		CODEX								Incident reports
Peak	SIA	0	0	0	0	0	0	0	0	0	3	0	0
Seafood Jurisdictions	NAC	1	0	0	0	0	0	0	0	3	3	3	3
	QSIA	1	1	1	1	1	1	1	1	1	1	1	0
	NSWPFA	2	2	2	2	2	1	1	1	2	3	3	0
	SIV	1	2	2	1	1	1	1	0	2	1	2	0
	TSIC	1	1	1	1	1	0	0	1	2	2	2	1
	WFSA	0	0	0	0	0	0	0	0	0	3	0	0
	WAFIC	0	0	0	0	0	0	0	0	2	0	0	0
	NTSC	1	1	1	1	1	0	0	1	2	3	1	1
	CFA	0	0	0	0	0	0	0	0	0	0	0	0
FRDC - Industry Partnerships	AAGA	1	1	1	1	1	0	0	1	0	1	1	0
	ACA	2	2	2	2	3	0	0	2	2	2	2	1
	ABFA	3	2	3	0	0	1	1	0	3	3	2	0
	ACPF	2	0	3	0	0	0	0	0	1	2	2	0
	APFA	1	1	1	0	0	0	0	1	2	2	2	1
	ASBTIA	1	1	1	3	3	1	1	1	2	1	1	0
	OA	2	2	2	2	2	0	0	1	0	0	3	1
	PPA	0	0	0	0	0	0	0	0	2	2	2	0
	SRL	3	0	0	3	3	0	0	3	3	0	3	0
	TSGA	0	0	0	0	0	0	0	0	0	0	0	0
	WRLC	0	0	0	0	0	0	0	0	0	0	0	0
Other Key Fisheries	TA	2	0	0	0	0	0	0	0	0	0	2	0
	SETFIA	0	0	0	0	0	0	0	0	0	0	0	0
	SGWCPA	0	0	0	0	0	0	0	0	0	0	0	0
	QSMA	0	0	0	0	0	0	0	0	0	0	0	0
	SFA	1	1	1	1	1	0	0	1	1	1	1	0
	VRLA	0	1	1	1	1	0	0	1	2	2	1	0
	TACL	2	2	2		3	0	0	2	2	3	2	2
	TRLFA	0	0	0	0	0	0	0	0	0	0	0	0
	AAA	0	0	0	0	0	0	0	0	0	0	0	0
	ACWA	0	0	0	0	0	0	0	0	0	0	0	0
National Issue Leaders	SafeFish	0	0	0	0	0	0	0	0	1	1	1	0
	STAG	0	3	0	3	0	0	0	0	0	0	3	3
	SFM	0	0	0	0	3	0	0	0	0	0	0	0
	SIAA	3	3	3	2	2	2	2	3	0	3	3	0
	Corporate	2	0	0	0	0	2	2	2	0	0	2	1
	SeSAFE	0	0	0	0	0	0	0	0	0	0	0	0
	Ocean Watch	0	0	0	0	0	0	0	0	0	0	0	0
	WISA	0	2	2	1	1	0	0	0	2	1	1	0

f. Industry RD&E

		6. Industry RD&E				
		a. Industry Strategy and Planning	b. Precompetitive Industry Investment	c. Industry Productivity	d. Liaison and reporting to Government, others	e. International Networks and 3rd Parties
					DAWR, NFF, etc	ICFA, GSSI, Slavery
Peak	SIA	0	0	0	0	0
Seafood Jurisdictions	NAC	3	2	2	3	2
	QSIA	1	1	1	1	1
	NSWPFA	3	3	3	3	2
	SIV	1	2	1	3	1
	TSIC	3	1	1	1	1
	WFSA	0	0	0	0	0
	WAFIC	2	0	0	2	3
	NTSC	2	2	1	1	0
	CFA	0	0	0	0	0
FRDC - Industry Partnerships	AAGA	2	3	3	2	1
	ACA	3	2	2	2	2
	ABFA	3	3	2	2	0
	ACPF	2	2	2	1	0
	APFA	1	1	1	2	0
	ASBTIA	3	1	3	3	3
	OA	2	2	2	3	0
	PPA	2	2	2	2	0
	SRL	3	3	3	3	3
	TSGA	0	0	0	0	0
	WRLC	0	0	0	0	0
Other Key Fisheries	TA	3	0	2	3	3
	SETFIA	0	0	0	0	0
	SGWCPA	0	0	0	0	0
	QSMA	0	0	0	0	0
	SFA	1	1	1	1	0
	VRLA	1	1	1	1	0
	TACL	3	2	2	2	2
	TRLFA	0	0	0	0	0
	AAA	0	0	0	0	0
	ACWA	1	1	1	1	
National Issue Leaders	SafeFish	2	0	0	2	2
	STAG	0	0	0	0	0
	SFM	3	3	2	2	2
	SIAA	1	0	0	3	3
	Corporate	0	0	0	0	0
	SeSAFE	0	0	0	0	0
	Ocean Watch	3	1	2	3	1
	WISA	0	0	0	0	0

Activity Scope

This table presents organisational responses regarding their range of activities.

		A. Organisational Activity Scope										
		Representation	NRM	Preharvest	Harvest	Processing	Distribution /Wholesale	Retail	Export	Import	RD&E	Regulation
Peak	SIA	Representation										
Seafood Jurisdictions	NAC	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale					Regulation
	QSIA	Representation			Harvest	Processing	Distribution /Wholesale	Retail	Export	Import	RD&E	
	NSWPFA	Representation		Preharvest	Harvest	Processing						
	SIV	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale		Export	Import	RD&E	
	TSIC	Representation		Preharvest	Harvest	Processing						
	WFSA	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale	Retail				
	WAFIC	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale	Retail	Export	Import	RD&E	
	NTSC	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale					
	CFA											
FRDC - Industry Partnerships	AAGA	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale		Export		RD&E	
	ACA	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale		Export		RD&E	
	ABFA	Representation		Preharvest	Harvest						RD&E	
	ACPF	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale				RD&E	
	APFA	Representation	NRM	Preharvest	Harvest	Processing		Retail		Import	RD&E	
	ASBTIA	Representation		Preharvest	Harvest	Processing					RD&E	
	OA	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale				RD&E	
	PPA	Representation	NRM	Preharvest	Harvest	Processing					RD&E	
	SRL	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale		Export		RD&E	
	TSGA											
	WRLC											
Other Key Fisheries	TA	Representation	NRM	Preharvest	Harvest	Processing			Export		RD&E	
	SETFIA											
	SGWCPA											
	QSMA											
	SFA	Representation		Preharvest	Harvest						RD&E	
	VRLA	Representation		Preharvest	Harvest	Processing					RD&E	
	TACL	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale		Export		RD&E	
	TRLFA											
	AAA											
	ACWA	Representation		Preharvest	Harvest							
National Issue Leaders	SafeFish			Preharvest	Harvest	Processing	Distribution /Wholesale	Retail	Export	Import		Regulation
	STAG								Export			
	SFM	Representation		Preharvest	Harvest	Processing	Distribution /Wholesale	Retail		Import		
	SIAA						Distribution /Wholesale			Import		
	Corporate											
	SeSAFE											
	Ocean Watch		NRM	Preharvest	Harvest	Processing	Distribution /Wholesale	Retail	Export		RD&E	Regulation
	WISA	Representation										

Organisation Membership

This table presents

		B. Organisational Membership Sources									
		Licensed fishers	**Licensed farmers**	**Owners (quota, etc)**	**Processors /Merchants**	**Investors**	**3rd Party Providers**	**Governments**	**Researchers**	**NGOs**	**Other**
Peak	SIA	Licensed fishers	Licensed farmers	Owners	Processors /Merchants		3rd Party Providers		Researchers		
Seafood Jurisdictions	NAC		Licensed farmers				3rd Party Providers				Other
	QSIA	Licensed fishers		Owners		Investors					
	NSWPFA	Licensed fishers					3rd Party Providers				
	SIV	Licensed fishers	Licensed farmers	Owners							Other
	TSIC	Licensed fishers	Licensed farmers				3rd Party Providers				
	WFSA	Licensed fishers									
	WAFIC	Licensed fishers	Licensed farmers	Owners	Processors /Merchants	Investors					Other
	NTSC	Licensed fishers	Licensed farmers	Owners							
	CFA										
FRDC - Industry Partnerships	AAGA		Licensed farmers	Owners							
	ACA	Licensed fishers		Owners	Processors /Merchants		3rd Party Providers				
	ABFA		Licensed farmers	Owners							
	ACPF	Licensed fishers		Owners							
	APFA		Licensed farmers	Owners		Investors	3rd Party Providers	Governments	Researchers		
	ASBTIA			Owners							
	OA		Licensed farmers	Owners							
	PPA	Licensed fishers	Licensed farmers								
	SRL	Licensed fishers			Processors /Merchants				Researchers	NGOs	Other
	TSGA										
	WRLC										
Other Key Fisheries	TA	Licensed fishers			Processors /Merchants		3rd Party Providers				Other
	SETFIA										
	SGWCPA										
	QSMA										
	SFA	Licensed fishers				Investors					
	VRLA	Licensed fishers		Owners	Processors /Merchants						
	TACL	Licensed fishers		Owners	Processors /Merchants						
	TRLFA										
	AAA										
	ACWA		Licensed farmers				3rd Party Providers				
National Issue Leaders	SafeFish	Licensed fishers	Licensed farmers	Owners	Processors /Merchants			Governments			
	STAG					Investors		Governments			
	SFM	Licensed fishers	Licensed farmers	Owners	Processors /Merchants						
	SIAA				Processors /Merchants						
	Corporate										
	SeSAFE										
	Ocean Watch	Licensed fishers	Licensed farmers	Owners	Processors /Merchants					NGOs	
	WISA	Licensed fishers	Licensed farmers	Owners	Processors /Merchants	Investors	3rd Party Providers	Governments	Researchers	NGOs	

Utilisation and Policy

This table presents organisational responses to two questions, regarding underutilised capacities, and policy areas where contribution could be made.

		Is there a Capability you have that is not fully utilised?		Is there a national policy area you are good at and can contribute nationally?			
Peak	SIA	n/a	n/a	Raise Seafood Profile to Government	Ask Gov't to be growth focussed		
Seafood Jurisdictions	NAC	No					
	QSIA	No		Community engagement	Mental Health	Resource Security & Access	
	NSWPFA	No		Fishery advisory services			
	SIV	Build focus on consumer					
	TSIC	Marine and Aquatic safety (with limits)	Seismic	Mental Health	Digital transition for Fish. Mgt.		
	WFSA	Social license & community engagement	Fisheries management legislation	Social license & community engagement	Fisheries management legislation		
	WAFIC	No		3rd Party Accreditation	Marine Parks	Resource Allocation	
	NTSC	Fishery management		Seafood labelling	Resource sharing		
	CFA						
FRDC - Industry Partnerships	AAGA	No		Translocation of aquatic animals	Energy costs and renewables		
	ACA	No		Seeding of wild catch fisheries	Digital Fishery management	Export marketing & promotion	
	ABFA						
	ACPF	Market access & traceability	Social license	Biosecurity - EADRA Wildcatch	Import protocols		
	APFA	No		Minor Use Permits	Animal Health	Biosecurity	Animal Welfare
	ASBTIA						
	OA	Food Integrity	Advocacy & Promotion	Policy for Inshore ranched fisheries	Interface terrestrial and marine	Products from industry consolidation	
	PPA	No					
	SRL	Consultation to Oil & Gas	Financial skills of Members	Oil & Gas interface	Impact on FTAs & trade - STAG		
	TSGA						
	WRLC						
Other Key Fisheries	TA	No					
	SETFIA						
	SGWCPA						
	QSMA						
	SFA	Murray Darling Basin	Water quality in MDB	Indigenous Fisher body to support IRG.	Deep capability of key consultants		
	VRLA	Be more strategic		Resource allocation	Property rights	Fisheries management efficiency	
	TACL	No		Seeding of wild catch fisheries	Digital Fishery management		
	TRLFA						
	AAA						
	ACWA	No		CoOL	Animal Health		
National Issue Leaders	SafeFish	Build National Food Safety	Build Food Safety Capacity	Food Safety	Market Access		
	STAG	No		Trade			
	SFM	No		Range of areas			
	SIAA	Imported food issues		Modern Day Fishery Slavery	DAWR: Imported Food; Biological Consultation; Fish Names	Global Seafood Communicators Group	
	Corporate						
	SeSAFE						
	Ocean Watch	National extension	National education	Aquatic sustainability			
	WISA			Establish a national mental health charity	Women's skills at home		

3. Organisational Capability by Function

a. Sustainable Aquatic Environment

The following table presents the estimated capability score (3 red / 2 green) of leading seafood organisations based on initial phone consultations. Organisations with the same colour have the same capability.

	Sustainable Aquatic Environment				
Rank	a. Aquatic Environment - wild + aquaculture	b. Marine Species and Status	c. Animal Health	d. Biosecurity	e. Climate Change
SIA					
1	NAC	ASBTIA	NAC	NAC	NAC
2	ASBTIA	PPA	QSIA	QSIA	ASBTIA
3	PPA	TA	AAGA	AAGA	PPA
4	Ocean Watch	NAC	ABFA	ABFA	SFM
5	NSWPFA	NSWPFA	ASBTIA	ASBTIA	NSWPFA
6	SIV	SIV	OA	OA	SIV
7	TSIC	TSIC	PPA	PPA	TSIC
8	ACA	ACA	SRL	TACL	ACA
9	OA	SRL	NSWPFA	NSWPFA	OA
10	SRL	TACL	SIV	SIV	SRL
11	TA	SFM	TSIC	TSIC	TA
12	SFA	Ocean Watch	ACA	ACA	SafeFish
13	TACL		SFA	SRL	Ocean Watch
14	SafeFish		VRLA	SFA	
15	SFM		TACL	SFM	
16			SFM	Ocean Watch	

b. Community Endorsement of Seafood Industry

The following table presents the estimated capability score (3 red / 2 green) of leading seafood organisations based on initial phone consultations. Organisations with the same colour have the same capability.

	Community Endorsement of Seafood Industry			
Rank	a. Community Engagement & Perception	b. Recreational Community Relations	c. Indigenous Community Relations	d. Industry PR & Image Promotion
SIA				
1	NAC	ASBTIA	NTSC	SIV
2	NSWPFA	NSWPFA	NSWPFA	WFSA
3	SIV	TSIC	SIV	ACPF
4	TSIC	NTSC	TSIC	SFM
5	WFSA	PPA	WAFIC	NSWPFA
6	ACPF	SRL	ASBTIA	TSIC
7	PPA	TA	PPA	NTSC
8	SRL	SFM	SFM	ABFA
9	SFM	Ocean Watch	Ocean Watch	OA
10	Ocean Watch			TA
11	WISA			VRLA
12	QSIA			Ocean Watch
13	WAFIC			
14	NTSC			
15	ACA			
16	TA			

c. Resource Allocation, Access & Use

The following table presents the estimated capability score (3 red / 2 green) of leading seafood organisations based on initial phone consultations. Organisations with the same colour have the same capability.

	Resource Allocation, Access and Use					
Rank	a. Resource Access	b. Marine Oil & Gas Interface	c. Marine Parks	d. IUU Fishing in Australian waters	e. Harvest, Processing & Viability	f. Digital Technology - radio, logbooks, VMS
SIA						
1	NAC	NAC	PPA	ASBTIA	TA	SIV
2	ASBTIA	SIV	SRL	NSWPFA	QSIA	TSIC
3	PPA	TSIC	TA	TSIC	NSWPFA	SRL
4	SRL	WAFIC	NAC		SIV	TA
5	TA	ASBTIA	NSWPFA		TSIC	VRLA
6	VRLA	PPA	TSIC		ACA	SFM
7	TACL	SRL	WFSA		OA	WFSA
8	NSWPFA	VRLA	WAFIC		TACL	NTSC
9	SIV	NTSC	NTSC		SFM	ACA
10	TSIC	TA	ASBTIA		SIAA	TACL
11	WAFIC		VRLA			
12	ACA		SFM			
13	ABFA					
14	SFM					
15						
16						

d. Human Capacity

The following table presents the estimated capability score (3 red / 2 green) of leading seafood organisations based on initial phone consultations. Organisations with the same colour have the same capability.

	Human Capacity			
Rank	a. Leadership and Skills	b. Employment and Labour Relations	c. Work Safety - harvest & postharvest	d. Mental Health
SIA				
1	QSIA	WFSA	ACA	WFSA
2	NSWPFA	ACA	ASBTIA	SRL
3	SIV	ASBTIA	SRL	SFM
4	WAFIC	TA	TACL	WISA
5	ACPF	TACL	SFM	NAC
6	SFM	SFM	Se SAFE	QSIA
7	NAC	NAC	NAC	SIV
8	TSIC	TSIC	NSWPFA	TSIC
9	NTSC	APFA	TSIC	WAFIC
10	ACA		ABFA	ACA
11	ABFA		ACPF	ASBTIA
12	TA		PPA	TA
13	TACL		TA	SFA
14	SafeFish		Ocean Watch	VRLA
15	Ocean Watch			TACL
16				Ocean Watch

e. Seafood Supply, Markets and Trade

The following table presents the estimated capability score (3 red / 2 green) of leading seafood organisations based on initial phone consultations. Organisations with the same colour have the same capability.

	Seafood Supply, Markets and Trade											
Rank	a. Seafood Product Standards	b. Domestic Supply & Access	c. Domestic Marketing & Promotion	d. Export Market Supply & Access	e. Export Marketing & Promotion	f. Import Supply & Promotion	g. Import Marketing & Promotion	h. Seafood Freight and Logistics	i. Aquatic Animal Welfare	j. Country of Origin Labelling	k. Seafood Safety	l. Communication of Status & Risk
SIA												
1	ABFA	SafeFish	ABFA	ASBTIA	ACA	SFM	SFM	SRL	NAC	NAC	NAC	NAC
2	SRL	SFM	ACPF	SRL	ASBTIA	SIAA	SIAA	SFM	ABFA	NSWPFA	NSWPFA	SafeFish
3	SFM	NSWPFA	SFM	SafeFish	SRL			ACA	SRL	WFSA	OA	TACL
4	NSWPFA	SIV	NSWPFA	NSWPFA	TACL			TACL	NSWPFA	NTSC	SRL	
5	ACA	ACA	SIV	ACA	STAG			SIAA	SIV	ABFA	SafeFish	
6	ACPF	ABFA	ACA	OA	NSWPFA				TSIC	TACL	SFM	
7	OA	OA	OA	TACL	OA				WAFIC	SFM	SIV	
8	TA	TACL	TACL	SFM	SFM				NTSC	TSIC	TSIC	
9	TACL	Ocean Watch	Ocean Watch						ACA	ACA	ACA	
10	SIAA								APFA	ACPF	ABFA	
11									ASBTIA	APFA	ACPF	
12									PPA	PPA	APFA	
13									VRLA	VRLA	PPA	
14									TACL		TA	
15									Ocean Watch		TACL	
16											SIAA	

f. Industry RD&E

The following table presents the estimated capability score (3 red / 2 green) of leading seafood organisations based on initial phone consultations. Organisations with the same colour have the same capability.

	Industry RD&E				
Rank	a. Industry Strategy and Planning	b. Precompetitive Industry Investment	c. Industry Productivity	d. Liaison and reporting to Gov't, others	e. International Networks and 3rd Parties
SIA					
1	NAC	NSWPFA	NSWPFA	NAC	WAFIC
2	NSWPFA	AAGA	AAGA	NSWPFA	ASBTIA
3	TSIC	ABFA	ASBTIA	SIV	SRL
4	ACA	SRL	SRL	ASBTIA	TA
5	ABFA	SFM	NAC	OA	SIAA
6	ASBTIA	NAC	ACA	SRL	NAC
7	SRL	SIV	ABFA	TA	NSWPFA
8	TA	NTSC	ACPF	SIAA	ACA
9	TACL	ACA	OA	Ocean Watch	TACL
10	SFM	ACPF	PPA	WAFIC	SafeFish
11	Ocean Watch	OA	TA	AAGA	SFM
12	WAFIC	PPA	TACL	ACA	
13	NTSC	TACL	SFM	ABFA	
14	AAGA	QSIA	Ocean Watch	APFA	
15	ACPF	TSIC	QSIA	PPA	
16	OA	APFA	SIV	TACL	