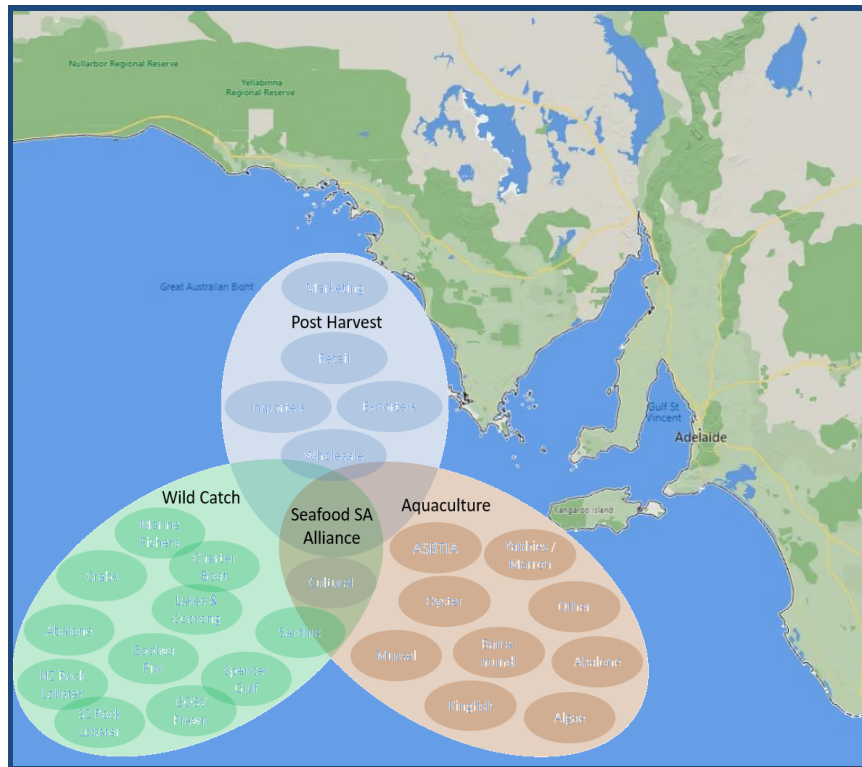


Workshop to examine the viability of establishing a peak seafood industry body for South Australia



Ian Knuckey and Richard Stevens

FRDC Project 2020/130

2022



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Executive Summary

Following the wind-up of Wildcatch Fisheries SA, a seafood industry forum was held in mid-2021 to gauge support for a new peak industry body to represent the interests of the South Australia Seafood Industry to Government, its agencies, other stakeholders and the community. At this forum, key fishing and seafood stakeholders gave in-principle support for the idea, but recognised there was a range of views about the need for such a body, what it would do, what membership it might comprise, how it might be structured, and what links it might have with other established industry organisations. Assisted by funding from FRDC, a Steering Committee was formed to help resolve issues and explore potential options for a new organisation (termed in this report as “Seafood SA”) to unify and support the industry into the future.

At the outset, it was recognised that there are already a number of well established and functioning industry associations representing the different wild-catch and aquaculture industry sectors in South Australia, and that the formation of Seafood SA should in no way compromise or undermine the support, roles and responsibilities of these associations. To this end, it was agreed that a simple “alliance” of these groups and associations to support Seafood SA would be the most beneficial and cost-effective means to progress. An industry survey was developed to provide the Steering Committee with a better understanding of issues that might be tackled by Seafood SA and the potential scope of its roles and responsibilities.

The issues currently faced by the seafood industry were prioritised. Many were considered to be adequately dealt with, either by individual businesses or the established associations. There were some high priority issues, however, which most respondents thought should be handled by a peak body such as Seafood SA:

- over-arching SA fisheries policy and management;
- regulatory costs and complexity; and,
- shared access arrangements (recreational, Indigenous and MPAs).

Lower priority issues were biosecurity, seismic activity and a range of environmental issues including coastal management, climate change and pollution.

The most important roles that a peak body such as Seafood SA could play in handling these issues was in the areas of:

- policy analysis;
- lobbying government; and,
- stakeholder consultation and communication.

The Steering Committee acknowledged that membership would need to be flexible but open to Industry Associations and others with a direct relationship with the commercial fishing sector in SA. It was suggested that membership of Seafood SA could include the wild-catch fishing sector, aquaculture sector, the charter industry and elements of the post-harvest sector (processors, wholesalers, distributors, retailers, marketers etc.). It was recognised that the first two sectors are currently well represented by associations, but this does not yet apply to the post-harvest sector.

There was general support workshop participants and those responding to the survey from industry/SC???? for the concept of Seafood SA if it addressed the above over-arching roles and responsibilities and did not undermine current industry associations. How such a

membership base might contribute financial and in-kind support for Seafood SA is yet to be determined and requires further discussions of the Steering Committee with current industry associations.

This report recommends that the organisation would be established with a “minimalist” approach with an agreed set of objectives along with a limited budget for the conduct of its activities. It is not proposed that the organisation have a constitution or be incorporated; rather it would have an agreed “Procedure for the conduct of Meetings” including the election of the Chair and appointment of a secretariat. The chair would preferably be a person with extensive knowledge of the Seafood sector in South Australia, or failing that, a person with sound business knowledge and an understanding of the Seafood sector. The secretariat would ensure professional organisation and proper governance arrangements are complied with.

An opportunity and mechanism for initial establishment of Seafood SA is provided by the current quarterly meetings of the Executive Director Fisheries and Aquaculture (ED) with Seafood Industry Executive Officers and potential inclusion of nominated senior people from associated seafood industry organisations. It was proposed that meetings of Seafood SA occur four weeks prior to the quarterly meetings with the ED, to enable agenda items to be nominated for discussion, supported by appropriate analysis and recommendations for consideration by the ED. Preparation of the Agenda and Business Items would be coordinated by the Secretariat with appropriate input (drafting of background Business Items) by those Executive Officers and Industry generally with the appropriate skills and expertise.

It is proposed that funding be provided via the existing co-management component of Industry Executive Officer budgets (as agreed with PIRSA) or by direct financial contribution of the agreed Membership Fee. This has been discussed with the ED, and subject to appropriate governance arrangements supporting Seafood SA, he has agreed to provide this facility.

Depending on the level of support for the above approach, a second Industry Forum will be arranged to provide an opportunity for questions/comments, and to determine whether there is an appetite to formally establish Seafood SA.

Keywords: Peak body, representative, commercial fishing, aquaculture, post-harvest, industry association, South Australian fisheries

Acknowledgments

The time and input from members of the South Australian fishing and seafood Industry is appreciated for responding to questionnaire, and in particular those that participated in workshops and meetings. Richard Stevens and Franz Knoll are thanked for their leading role in the development of the project and facilitation of the initial workshop and subsequent meetings. We appreciate the secretarial support for the various workshops and meeting provided by Merilyn Nobes. We also appreciate the input and information provided by EOs and CEOs of the various SA industry associations and those that were members of the Steering Committee: Franz Knoll (Chair), Richard Stevens, Kyri Toumazos, Catherine Sayer, Damien Cappel, Adam Main, Brian Jeffriess, Neil MacDonald, and Merilyn Nobes (executive officer).

This project was funded by the Fisheries Research and Development Corporation and we appreciate the support of FRDC's Chris Izzo and Leah Fergusson as the project administrators.

Introduction

“A ‘peak body’ is a non-government organisation whose membership consists of smaller organisations of allied interests. The peak body thus offers a strong voice for the specific community sector in the areas of lobbying government, community education and information sharing between member groups and interested parties”.

Melville 2003

South Australia’s total value of seafood production (landed) in 2019/20 was \$461.8m (BDO 2021a), split about 50/50 between aquaculture (\$229.0m) and wild-catch fisheries (\$232.8m).

Key aquaculture sectors in South Australia (SA) include Southern Bluefin Tuna, Marine Finfish, Oysters, Mussels, Abalone, Freshwater Finfish and Marron/Yabbies. Tuna aquaculture comprises almost 60% of this value. Aquaculture contribution to gross state product (GSP) is almost \$300 million and employment is about 2500 full time equivalents (BDO 2021a).

Commercial wild-catch fisheries in SA include the: Abalone fishery; Blue Swimmer Crab fishery; Charter boat fishery; Lake Eyre Basin fishery; Lakes and Coorong fishery; Marine scalefish fishery; Gulf St Vincent prawn fishery; River fishery; Rock Lobster fishery; Sardine fishery; Spencer Gulf and West Coast prawn fishery; and the Miscellaneous fishery (species not included in management of above). Combined, the gross value of production (GVP) of SA commercial fisheries during 2019/20 was \$240 million, representing a total GSP contribution of just over \$515 million and a total employment contribution of over 4000 full time equivalents (BDO 2021b).

There are various associations affiliated with these fisheries and aquaculture enterprises (Table 1), but the commercial fishing sector has had various state-based peak bodies since the early 1960’s. It was first represented by the Australian Fishing Industry Council (SA), then the South Australian Fishing Industry Council, the Seafood Council of SA, and most recently Wildcatch Fisheries SA (WFSA). The Vision of WFSA was to “...unite, promote and protect the interests of South Australia’s seafood producing families”. The WFSA Mission was to:

- Secure the interests of South Australian seafood producers through effective representation, promotion and profiling of the Industry
- Provide an effective forum for the Industry’s sectors to work together on the collective interests of all seafood producers.
- Ensure the Organisation delivers effective outcomes in support of the interests of all licence holders by seeking to secure their social capital to provide a key food source for the community.

Quoted from its (most recent) Strategic Plan (WFSA 2016), WFSA focused on five priorities areas:

- **Access Security** – It is essential to support the rights and interests of seafood producing businesses in delivering on their role to be a key food production sector for the community.
- **Co-management** – Fisheries co-management is an arrangement in which responsibilities and obligations for sustainable fisheries management are negotiated, shared and delegated between government, fishers and other interest groups and

stakeholders – definition by FRDC’s national Steering Committee on the fisheries co-management initiative, Project No. 2006/068. Industry must be engaged and contribute to management, policy & research of the fishery and ecosystem so as to improve and responsibly harvest the marine resource.

- **Governance** – Delivering outcomes that benefit the Industry and its members requires that there are clear and effective structures to support the capacity of seafood producers and their organisations.
- **Industry Capacity** – Support the key component of the Industry, its people, in being well trained and resourced to effectively manage their organisations. Build Industry’s social licence through its involvement in securing and enhancing statutory rights and interests.
- **Industry Profiling** – At present the industry suffers from a general perception that the commercial wild catch fishing sector is unsustainable. Raising the industry’s profile, gaining community acceptance and building social licence are critical components to correcting these misconceptions and securing support to supply local seafood.

WFSA was launched in February 2008, but during 2021 the WFSA Board recognised that its value to industry was waning and came to the conclusion that the existing peak body:

- Did not provide the various commercial seafood stakeholders a strong business case for becoming a member;
- Had lost its ability to act as a peak body by providing a unified voice for the SA seafood sector;
- Was one voice to government in a plethora of fragmented industry bodies and members;
- Had lost the respect of government to be able to communicate a unified policy and advocate for that policy framework;
- Had a funding model that struggled to fund the needs of the sector; and,
- Had a business and governance model that did not reflect the needs of the seafood sector.

Based on this, the WFSA Board asked the CEO and Chair to wind-up WFSA but also requested they explore with all SA stakeholders, including commercial fishers, processors, PIRSA, Seafood Industry Australia (SIA) and the Fisheries Research and development Corporation (FRDC) pathways to develop a completely new peak body structure for SA. The WFSA Board wrote to all its members existing and past seeking their view on how to develop a process for creating a new peak body. The response to this consultation was that members still were committed to winding up WFSA by mid-2021, but they also agreed that holding a workshop to agree on a pathway to develop a new peak body was warranted.

FRDC agreed to fund this workshop to help facilitate discussions about a future SA peak seafood industry body. This report outlines that workshop process and subsequent progress.

Objective

The objective of the project was to host a workshop to determine the support, options and viability of a seafood peak industry body in South Australia.

Table 1. Various SA-based fishing / seafood associations.

Association	Acronym
Abalone Industry Association of SA	AIASA
Australian Barramundi Farmers Association	ABFA
Australian Southern Bluefin Tuna Industry Association	ASTBIA
Australian Sustainable Seaweed Alliance	
Central Zone Abalone Industry Association	CZAIA
Charter Boat Association of South Australia	
Commonwealth Fisheries Association	CFA
Goolwa PipiCo	
Great Australian Bight Trawl Industry Association	GABIA
Gulf St Vincent Prawn Boat Owners Association	SVGPBOA
Lakes and Coorong Fishery Southern Fisherman's Association	SFA
Marine Fishers Association	MFA
Northern Zone Rock Lobster Industry Association	NZRLIA
SA Blue Crab Pot Fishers Association	SABCPFA
Seafood Industry Australia	SIA
Small Pelagic Fishery Association	SPFA
South Australian Aquaculture Council	
South Australian Fishermans Co-operative Ltd	SAFCOL
South Australian Rock Lobster Advisory Council	SARLAC
Women in Seafood Australasia (South Australia)	WISA (SA)
South East Professional Fishermen's Association	SEPFA
Southern Shark Industry Alliance	SSIA
Southern Zone Abalone Industry Association	
Spencer Gulf & West Coast Fishermen's Association Inc.	SGWCPFA
Wildcatch Fisheries SA	WFSA

Methods

Stage 1

Invitation & Pre-Workshop Communication

Consultation was undertaken to ensure all possible stakeholders were communicated with on the purpose of the workshop and the proposed outputs. It was critical that this was done by champions of industry who could sell the proposition that this was the opportunity for a new start, to deliver unity and have a compelling business case for industry to invest. Invitations were sent to as many license holders and members of the seafood industry supply chain as possible – the goal was to allow complete transparency and establish that this was an open and welcoming workshop. The invitation included links to previous projects that have explored peak bodies:

- Ian Knuckey's project (Knuckey et al. 2015) to explore alternative peak body models in Qld "Review of structural and funding options for a peak body for the Queensland seafood industry" <https://www.frdc.com.au/project/2012-512>;
- Ian Plowman's (Plowman and MacDonald 2013) "People development program: A program to enhance membership participation, association health, innovation and leadership succession in the Australian fishing industry (Short title - Healthy Industry Associations and Succession)". The report provided case studies on healthy peak bodies and principles to implement <https://www.frdc.com.au/project/2011-410>.

Workshop

The workshop was held in Adelaide on 12 July 2021, with all Executive Officers and Presidents from South Australian seafood sector associations and other SA state seafood industry councils invited together with key fishing, aquaculture, and seafood personnel. The agenda of the workshop is provided at Appendix 2. Ian Knuckey was invited to the workshop to talk on the survey approach used for the Queensland seafood industry and what worked and what did not work in that project (FRDC 2012-512). The workshop wrap-up documented the agreed next steps and options for progressing a new peak body. This included an agreement on the timeline and who would lead the project forward from this point and how it might be funded.

Stage 2

Post-workshop meetings

All participants and invitees were sent a workshop report that included the next steps, options and timetable – this also included details on the communication and consultation strategy to ensure open two-way information flow.

Industry survey

Workshop participants were sent an online survey using "SurveyMonkey¹" to capture broad industry views on the major issues facing the SA seafood industry and potential roles and responsibilities of a future peak industry body. The Steering Committee and industry contacts associated with the workshop were asked to distribute the survey and website link

¹ SurveyMonkey Inc., Palo Alto, California, USA, www.surveymonkey.com

to as many people as possible in the South Australian seafood industry. The survey is provided at Appendix 5.

Results and Discussion

Pre-workshop

The pre-workshop background paper, agenda and invite list is provided at Appendix 2.

Workshop

A total of 40 industry members (two by teleconference call) participated in the workshop held in Adelaide on 12 July 2021. The workshop was facilitated by Richard Stevens with Ian Knuckey invited to speak about a similar project run in Queensland during 2013 (Knuckey et al. 2015).

Full details of the workshop notes and participants are provided at Appendix 3. A summary is provided below.

The facilitator of the workshop, Richard Stevens, began the workshop with an Acknowledgement of Country, welcomed everybody and thanked them for attending and expressed his appreciation to FRDC for providing funding to enable the workshop to proceed. He advised that this was a forum for the SA Seafood Industry to discuss and decide the direction it wants to take with a peak body. Richard asked participants to consider seven key questions regarding the need for a seafood industry peak body:

- Is there a need for a peak industry body at the State level and if so, what are the drivers/reasons for having one?
- Is there shared vision and strong industry support for establishing a peak industry body?
- What should be the objectives and scope of a State Peak Industry body?
- What would be the best structure for that body including paid staff and governing body?
- Who will qualify for membership?
- How will it be funded?
- What, if any, links should there be with other seafood industry bodies including Seafood Industry Australia?

These topics were discussed at length and while there were differing views expressed on a number of the key items listed above, there was in-principle support for a seafood peak industry body and to progress to Stage 2 of the FRDC project.

At the end of the workshop, a cross-section of industry members with respect to sectors, regions, and involvement in different industry associations, were selected to act as a Steering Committee to address Stage 2 of the project and flesh out the possible establishment of a seafood peak body. These people were not selected to be representative of a particular sector or industry association.

- Franz Knoll (Chair)
- Richard Stevens
- Kyri Toumazos
- Catherine Sayer
- Damien Cappel
- Adam Main

- Brian Jeffriess
- Neil MacDonald
- Marilyn Nobes

Following the workshop and discussions with Dr Patrick Hone of FRDC, it was agreed that Dr Ian Knuckey would take over as Principal Investigator from this point forward, with Richard Stevens as the Co-Investigator and Marilyn Nobes providing administrative support. The project team's role was to work with the Steering Committee to address the issues raised at the workshop and bring back options/proposals for further consideration by Industry.

Post-workshop

Steering Committee meetings

The Steering Committee met on three occasions after the workshop: 27 October 2021, 13 December 2021, and 13 January 2022 to consider the next steps and progress the process towards developing a workshop discussion paper and the results of the survey. The agenda and minutes of each of those meetings is provided at Appendix 4.

Industry survey

At their first meeting on 27 October 2021, the Steering Committee members agreed to use their contacts to circulate the online survey as far as possible amongst the seafood industry. The survey questions are shown at Appendix 5.

Although circulated widely, only 58 people filled out a questionnaire. Of these, over 75% of survey respondents were from the wild-catch sector, about 10% from the aquaculture sector (Figure 1), and the remainder from various aspects of the post-harvest sector. Of those from the wildcatch sector, about half were from the marine scalefish fishery (Figure 2). There were a number of fisheries from which no response was received. Consequently, caution should be taken in interpreting the results as representative of the broader industry, but it also potentially suggests a lack of interest by the broader industry in the need for a peak body. Across all sectors and fisheries, about 80% were already a current or past member of an industry association.

As part of the survey, respondents were asked to rank the importance (to them as individuals) of various issues facing the seafood industry in South Australia under headings of Product, Business, Access, Management and External². With regard to these, management and access issues were the top priority (Figure 3). Within the management area, cost of management and management policy were most important (Figure 4). The major access issues were access and allocation rights followed by impacts of bioregional planning and marine protected areas (Figure 5). Other areas of concern were product issues: price, logistics and market (Figure 6), business issues: particularly regulatory costs (Figure 7) and external issues including climate change, coastal development and port facilities (Figure 8).

² Issues presented in survey were randomly ordered for each survey to prevent systemic bias in responses.

In considering the priority issues mentioned above, many respondents thought their current associations could adequately deal with them. There were, however, a number of priority issues that respondents felt would be best dealt with by an overarching peak industry body (Figure 9) – termed in the survey and through the remainder of this report as “Seafood SA”.

Often outlined in Vision and Mission statements there is a need to have a clear understanding of what industry expects from a peak body organisation, how it might be structured, operated, and funded. At the outset, it was recognised that there are already a number of well established and functioning industry associations representing the different wild-catch and aquaculture industry sectors, and that the formation of Seafood SA should in no way compromise or undermine the support, roles and responsibilities of these associations. It was suggested that membership of Seafood SA should include the wild-catch fishing sector, aquaculture sector and elements of the post-harvest sector (processors, wholesalers, distributors, retailers, marketers etc.). It was recognised that the first two sectors are well represented by current associations, but this does not yet apply to the post-harvest sector. The Steering Committee acknowledged that membership would need to be flexible but open to Industry Associations and others with a direct relationship with the commercial fishing sector in SA. To this end, it was agreed that a simple “alliance” of these groups under Seafood SA would be the most beneficial and cost-effective structure under which to progress a peak body (Figure 10).

Considering the roles that are performed by the various current industry associations (Table 1), survey participants were asked to highlight those that might be best performed by Seafood SA. Based on their responses, the most important roles that a peak body could play in handling these issues was in the areas of policy analysis, lobbying government and stakeholder consultation and communication (Figure 11).

There was general support for the concept of Seafood SA by survey respondents (Figure 12) if it addressed the above over-arching roles and responsibilities and did not undermine current industry associations.

How such a membership base might contribute financial and in-kind support for Seafood SA was left unanswered, but it was agreed that the organisation would need to be established with a “minimalist” approach with an agreed set of objectives along with a limited budget for the conduct of its activities. It was not proposed that the organisation have a constitution or be incorporated; rather it would have an agreed “Procedure for the conduct of Meetings” including the election of the Chair and appointment of a secretariat. The chair would preferably be a person with extensive knowledge of the Seafood sector in South Australia, or failing that, a person with sound business knowledge and an understanding of the Seafood sector. The secretariat would ensure professional organisation and proper governance arrangements are complied with.

An opportunity and mechanism for initial establishment of Seafood SA is provided by the current quarterly meetings of the Executive Director PIRSA Fisheries and Aquaculture (ED) with Seafood Industry Executive Officers and potential inclusion of nominated senior people from associated seafood industry organisations. It was proposed that meetings of Seafood SA occur four weeks prior to the quarterly meetings with the ED, to enable agenda items to be nominated for discussion, supported by appropriate analysis and recommendations for consideration by the ED. Preparation of the Agenda and Business Items would be coordinated by the Secretariat with appropriate input (drafting of background Business

Items) by those Executive Officers and Industry generally with the appropriate skills and expertise.

It is proposed that funding be provided via the existing co-management component of Industry Executive Officer budgets (as agreed with PIRSA) or by direct financial contribution of the agreed Membership Fee. This has been discussed with the ED, and subject to appropriate governance arrangements supporting Seafood SA, he has agreed to provide this facility.

Depending on the level of support for the above approach, a second Industry Forum will be arranged to provide an opportunity for questions/comments, and to determine whether there is an appetite to formally establish Seafood SA

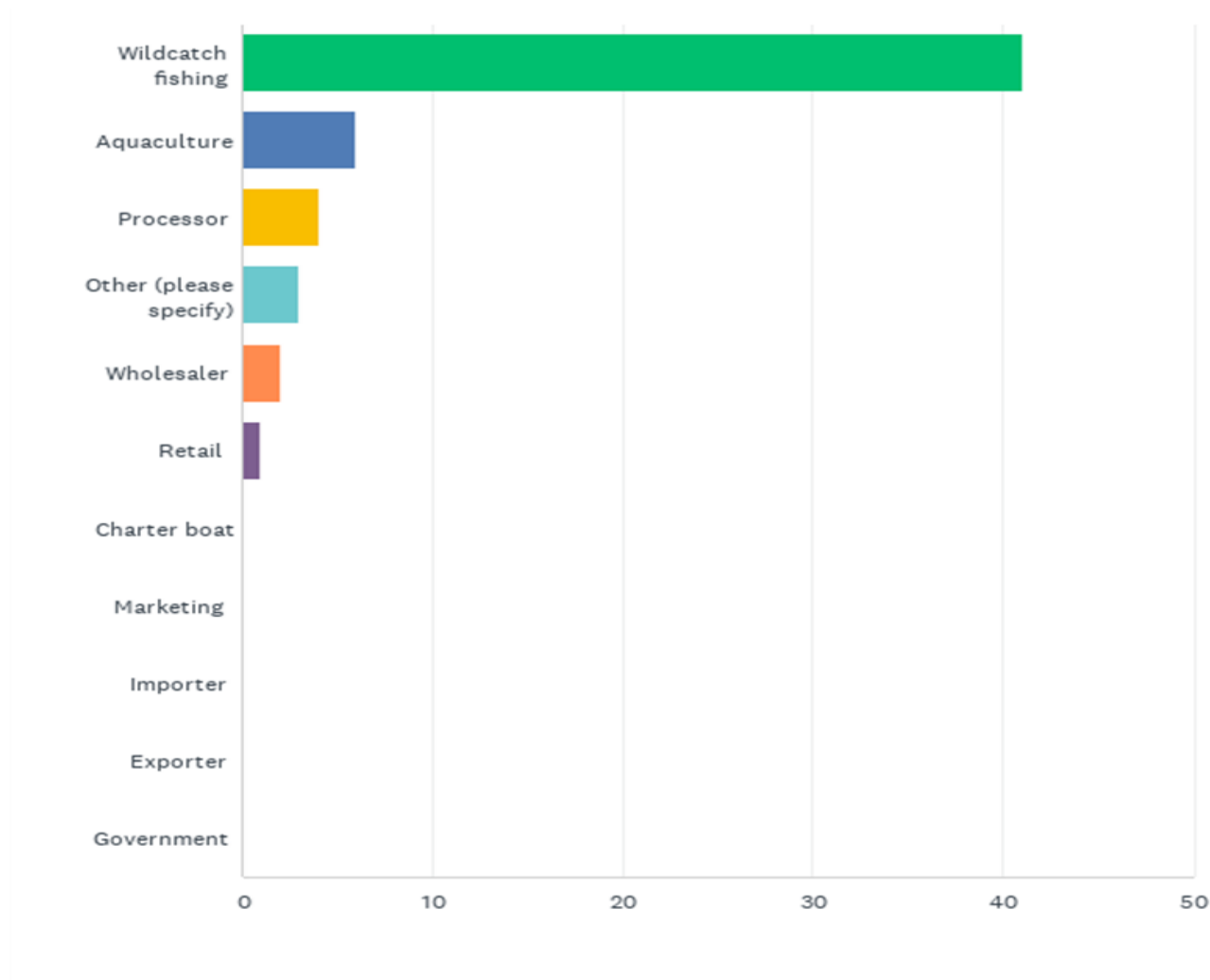


Figure 1. Sectoral composition of questionnaire respondents.

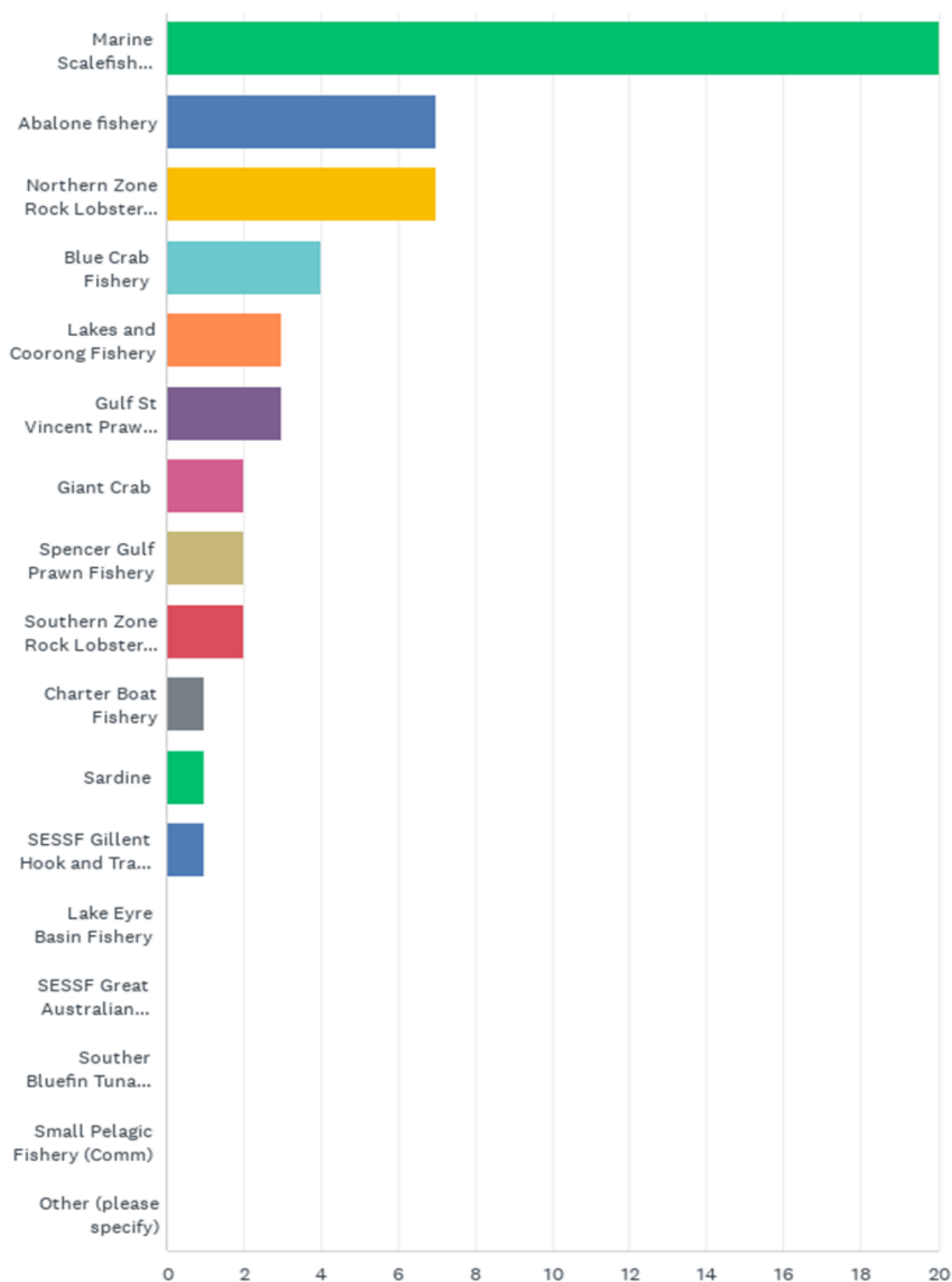


Figure 2. Commercial fishing survey respondents by fishery.

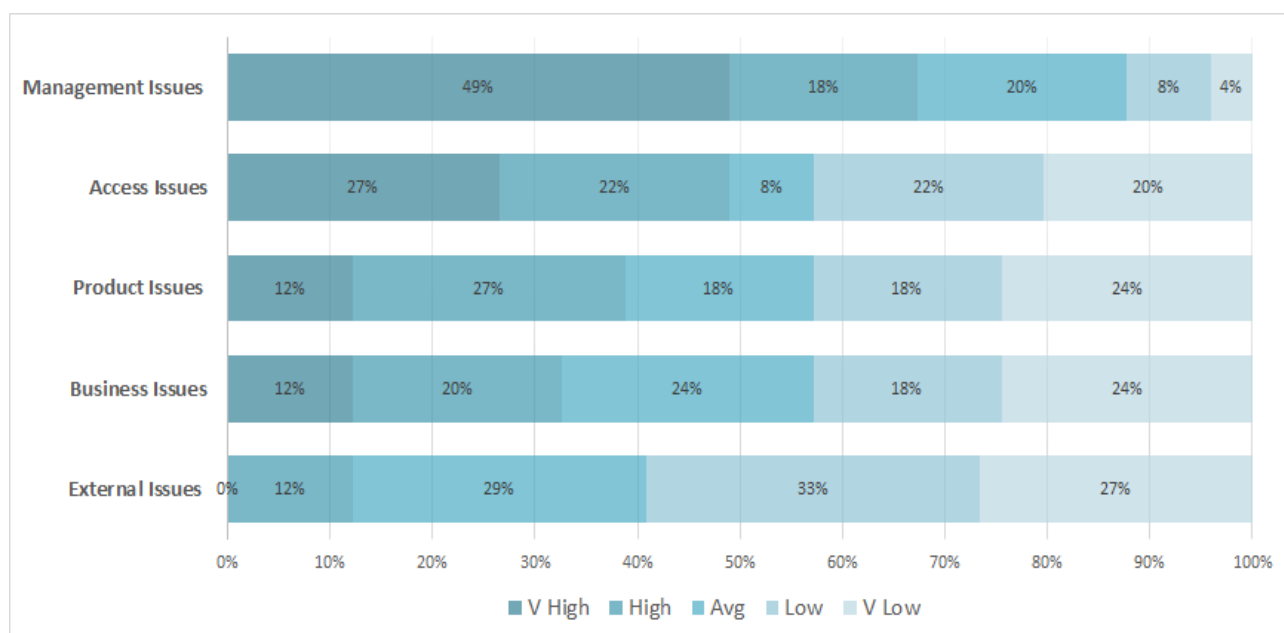


Figure 3. Relative importance of broad groups of issues.

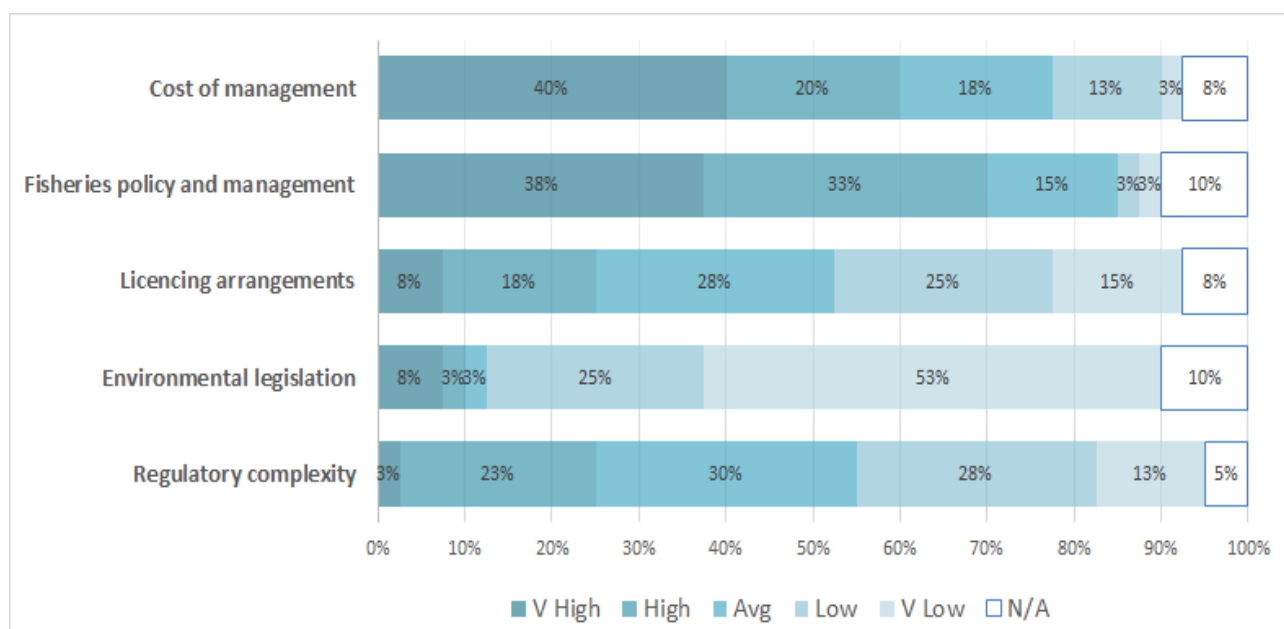


Figure 4. Relative importance of management issues

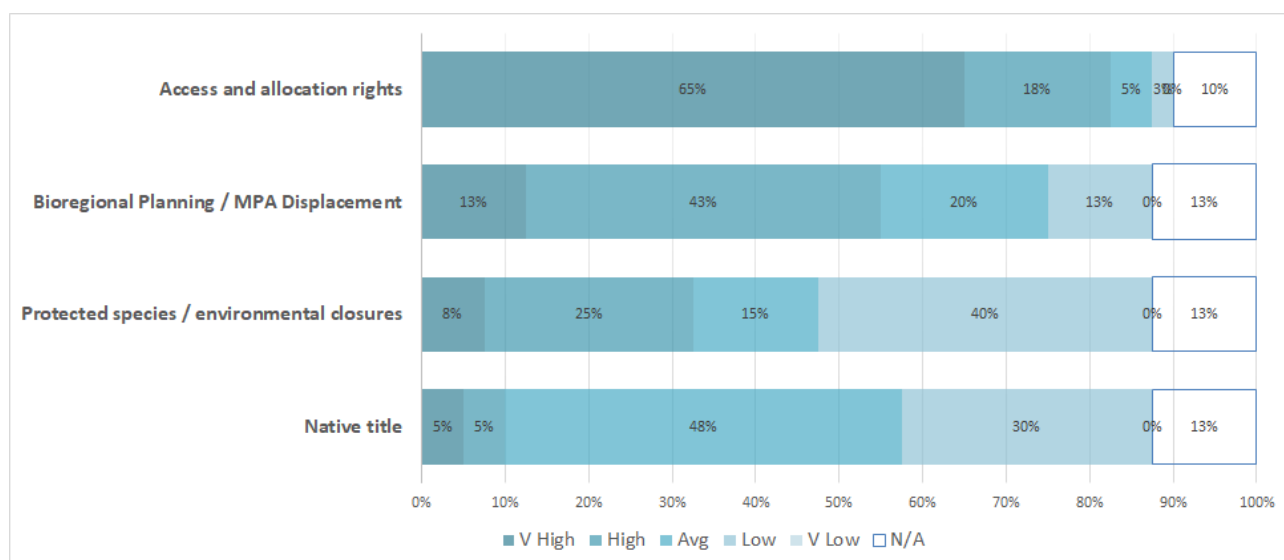


Figure 5. Relative importance of access issues.

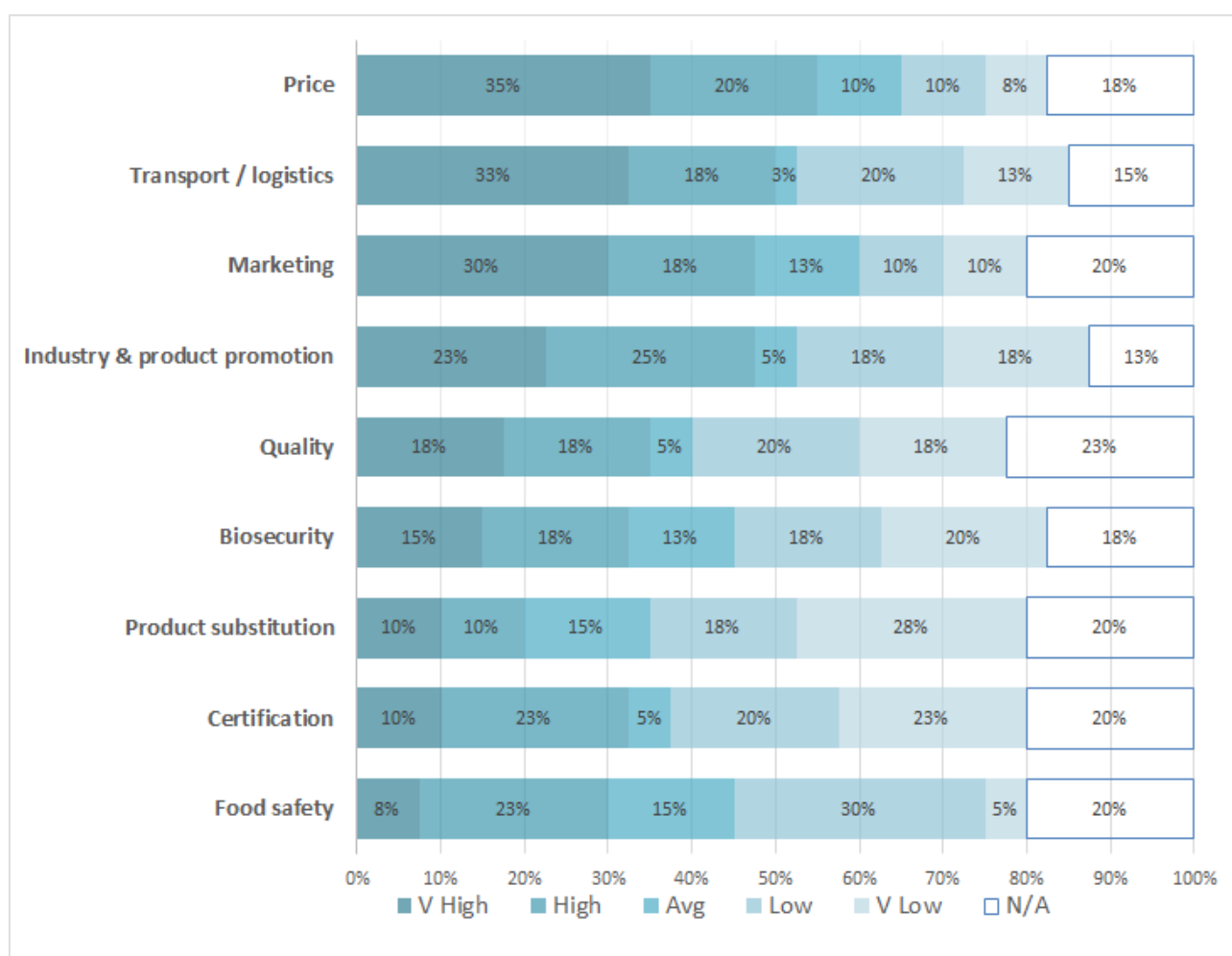


Figure 6. Relative importance of product issues.

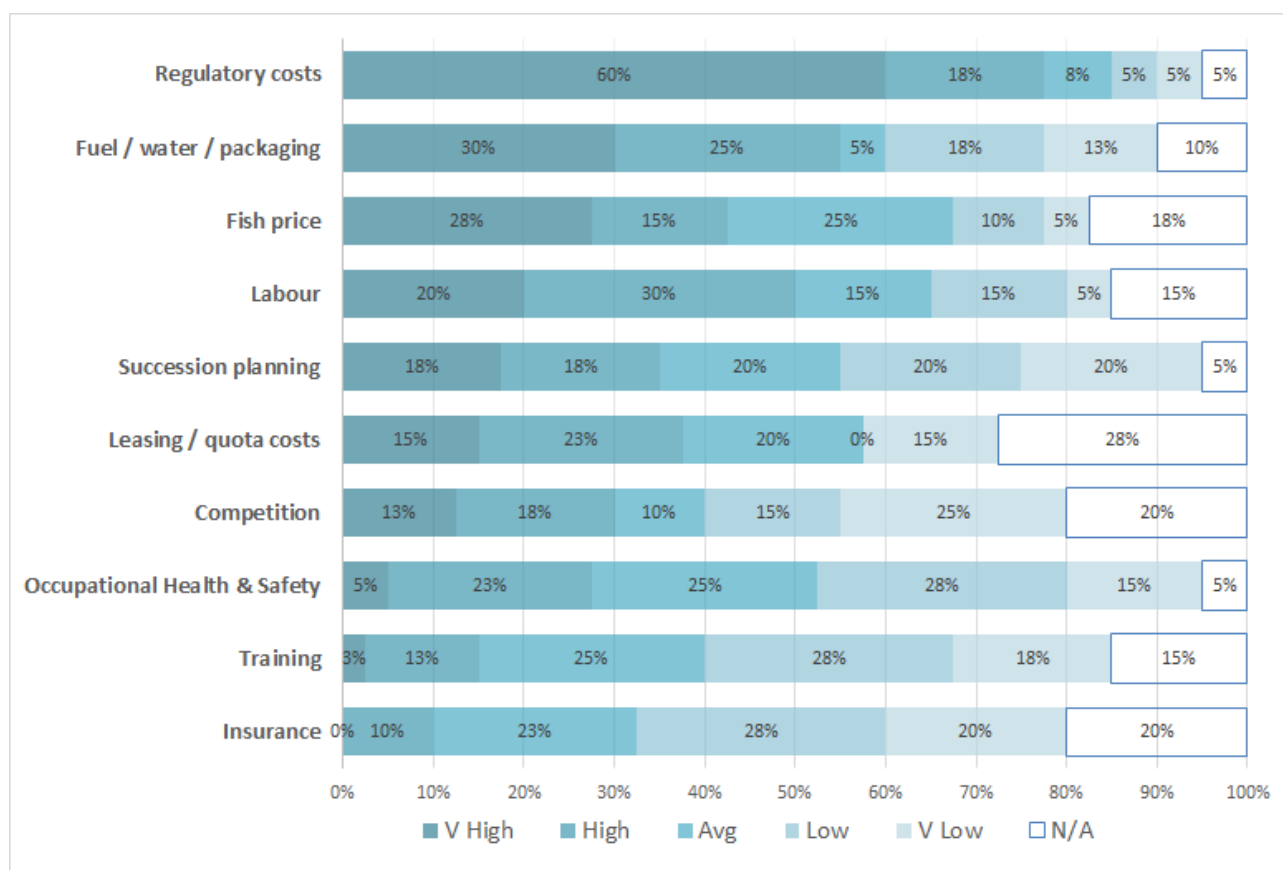


Figure 7. Relative importance of business issues.

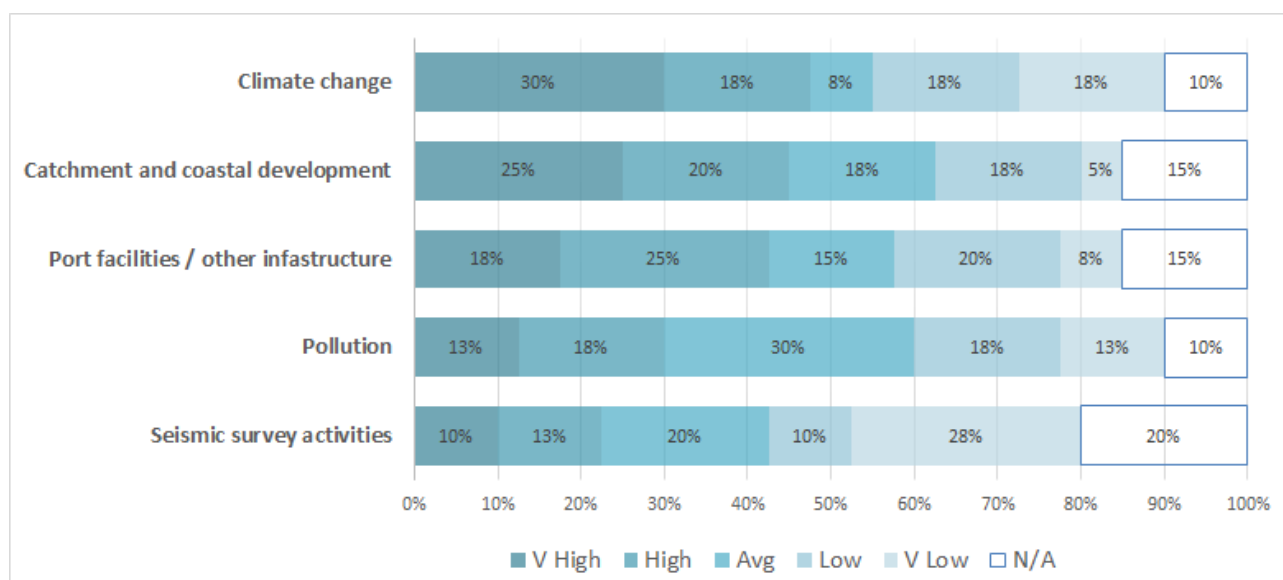


Figure 8. Relative importance of external issues.

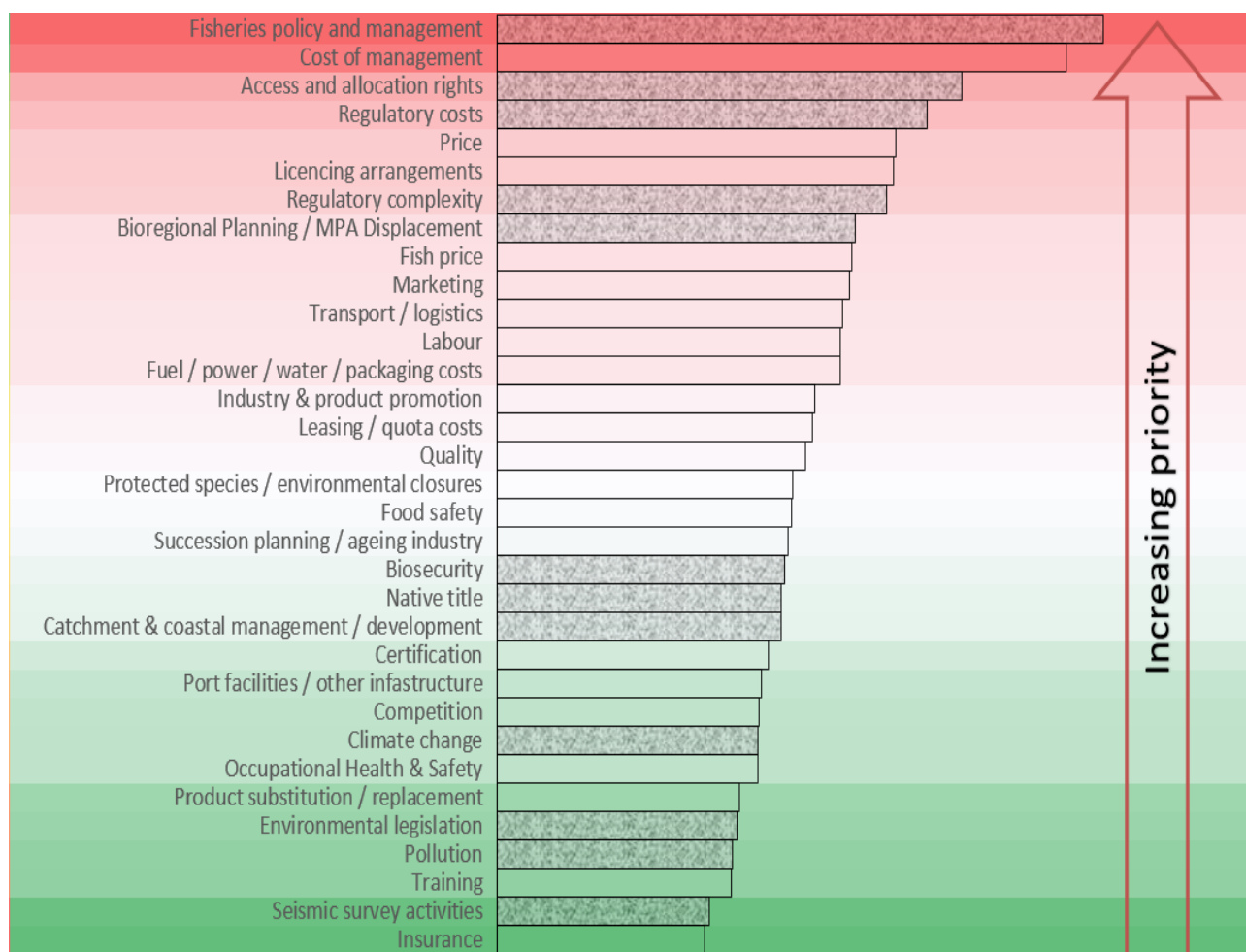


Figure 9. Issues that questionnaire respondents considered most important (top) to least important (bottom), and those that should be dealt with by "Seafood SA" (shaded).

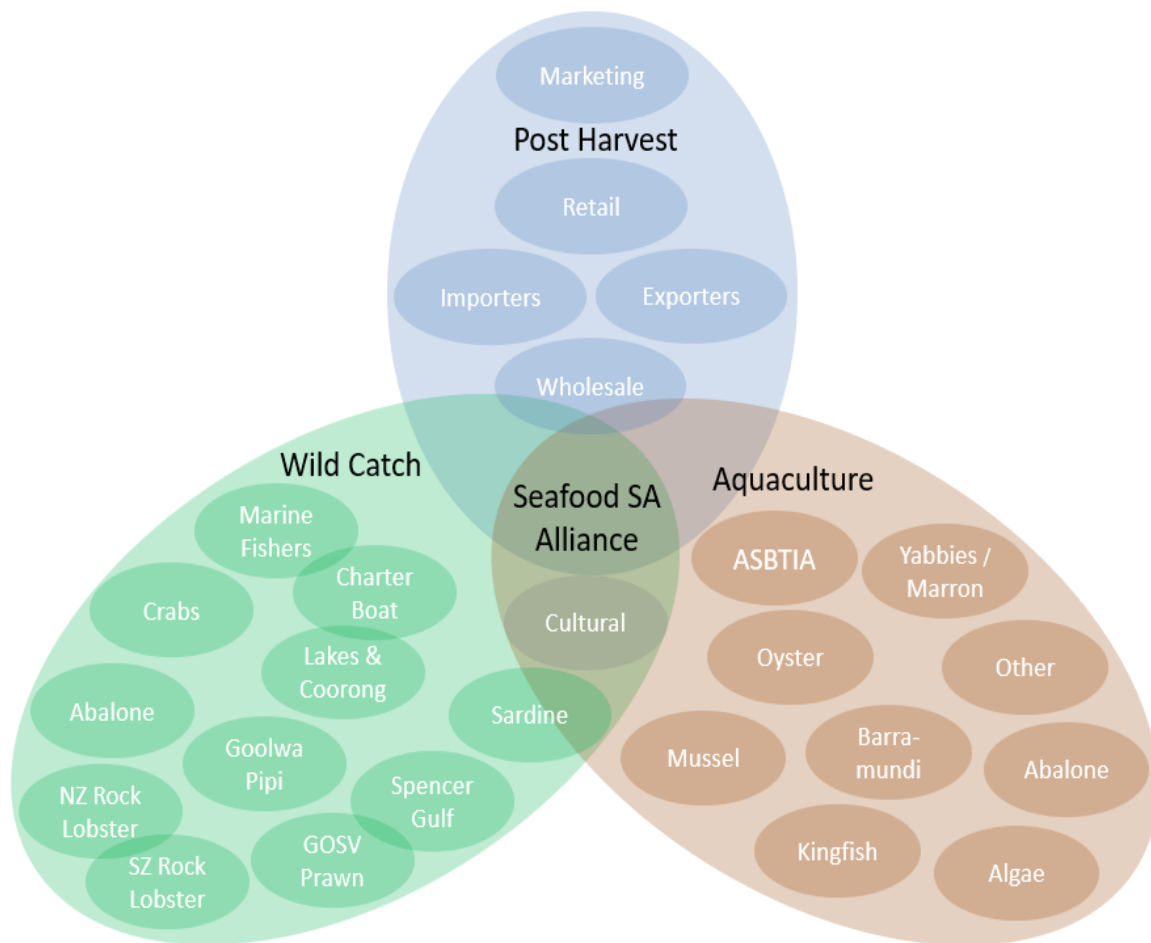


Figure 10. Schematic representation of potential “Seafood SA” alliance.

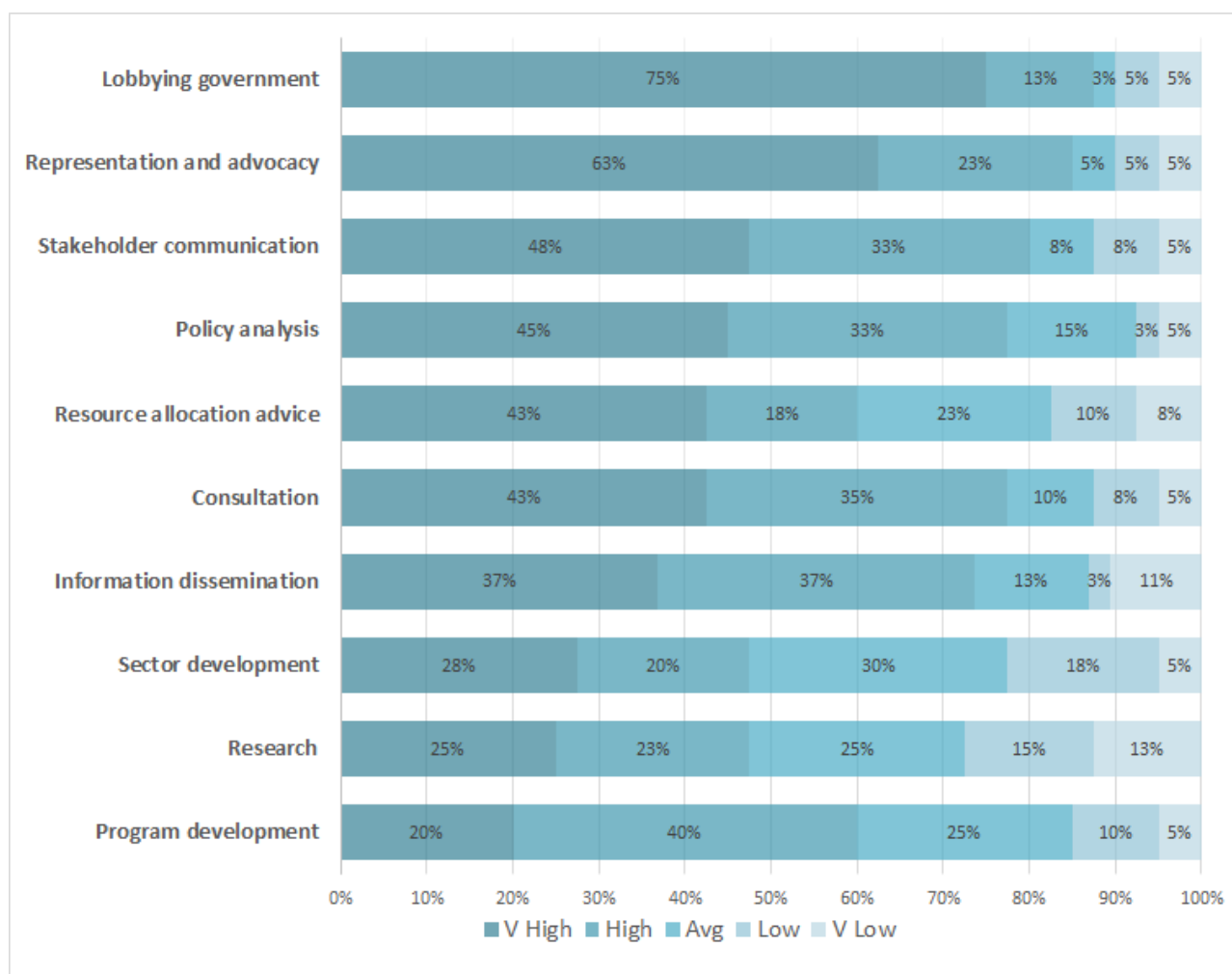


Figure 11. Relative importance of roles of Seafood SA.

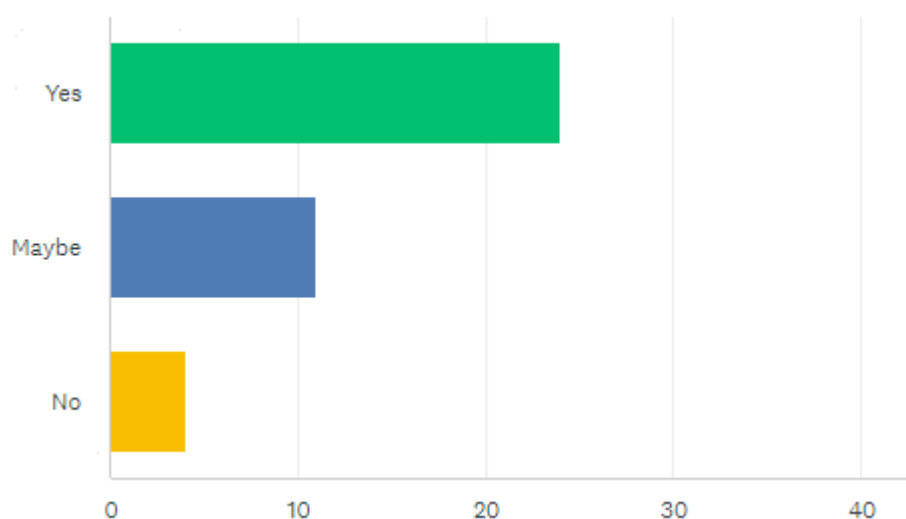


Figure 12. Survey participants responses to whether the South Australian seafood industry would benefit by forming an alliance such as Seafood SA.

Conclusions

Despite the best efforts of the project team and Steering Committee, there was only lukewarm engagement with the South Australian seafood with the prospect of developing a new SA peak seafood industry body at this time. Nevertheless, this project provides some direction for development of a new peak industry association for South Australia. It will be up to current industry associations to decide if a peak body is necessary at some stage in the future. In the mean time, the minimalist option of expanding the agenda and participation of the quarterly meetings of the Executive Director Fisheries and Aquaculture beyond the Seafood Industry Executive Officers to potentially include nominated people from associated seafood industry sectors and organisations.

Implications and Further Development

It is not appropriate to take further steps to develop new SA peak industry association until there is more widespread and active support from current industry associations and the broader fishing, aquaculture, and post-harvest seafood industry members.

Extension and Adoption

We have endeavoured to document the workshop process and follow-up activity of the Steering Committee as well as possible here so that, should the need for a peak body change in the future, the outcomes of the workshop and the ideas of the Steering Committee are readily available for reference.

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Appendix 1 – Staff

Name	Organisation	Project Involvement
Richard Stevens		Principal Investigator – Phase 1
Ian Knuckey	Fishwell Consulting	Principal Investigator – Phase 2
Merilyn Nobes	NMAC(SA)	Co-Investigator

Appendix 2 – Pre-workshop paper

Pre-workshop discussion paper

Seafood Industry Workshop 12 July 2021

SEAFOOD INDUSTRY WORKSHOP

A Workshop to examine the viability of setting up a Peak Seafood Industry Body for South Australia

This discussion paper sets out matters that need to be taken into account in considering the viability of setting up a new peak industry body for the Seafood Industry in SA.

The critical issues to be addressed include:

- Is there a need for a peak industry body at the State level and if so, what are the drivers/ reasons for having one?
- Is there shared vision and strong industry support for establishing a peak industry body?
- What should be the objectives and scope of a State Peak Industry body?
- What would be the best structure for that body including paid staff and governing body?
- Who will qualify for membership?
- How will it be funded?
- What, if any, links should there be with other seafood industry bodies, including Seafood Industry Australia (SIA)?

Seafood Industry Workshop 12 July 2021

This discussion paper has been provided to you firstly to encourage your attendance and participation in the Seafood Industry Workshop to be held on 12 July 2021, and secondly, to articulate the key issues as a focus for discussion.

Introduction

This discussion paper sets out a number of key matters that will need to be considered when addressing the viability of establishing a new peak body to represent the interests of the South Australian Seafood Industry. It endeavours to lay the groundwork for determining the level of support for a new peak industry body.

The history of the Seafood Industry in South Australia (and elsewhere in Australia) in relation to peak industry bodies has been dominated by personalities, competing agendas, lack of funding and an overall inability to establish a consistent and agreed approach to dealing with important issues affecting the success of the Industry. Whilst the key issues around healthy fish stocks and industry viability/profitability have always been at the forefront of industry discussion and debate, it has often been difficult, if not impossible, to gain widespread agreement on the best approach to advocating a united position to government and other stakeholders in the best interests of the Industry. The existence of strong fishery based industry associations is likely to contribute to these challenges. Invariably, views do not happily coincide, leaving both the Government and the public sector virtually free to implement what they see fit as the best outcome.

The formation of a peak body doesn't prevent individuals or companies expressing and advocating their own views privately or openly to decision makers. But it is essential that governments (and Oppositions for that matter), along with the public sector agencies responsible for fisheries management and research recognise properly run peak bodies as the principal source of advice. Sure, individuals and companies will always have the right to put their point of view forward, but that shouldn't unnecessarily negate the need for and relevance and effectiveness of a peak industry body.

And if there is no peak body, what will the industry do? Work individually, come together on an issue by issue basis, often in a pressured environment, and with no well thought out position?

Background

Earlier this year, the Wildcatch Fisheries SA (WFSA) Board came to the conclusion that the existing peak body:

- Did not provide the various commercial seafood stakeholders with a strong business case for becoming a member.
- Had lost its ability to act as a peak body by providing a unified voice for the SA Seafood Industry.
- Was one voice to government in a plethora of fragmented industry bodies and members.
- Had lost the respect of government to be able to communicate a unified policy and advocate for that policy framework.

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- Had a funding model that struggled to fund the needs of the sector.
- Had a business and governance model that did not reflect the needs of the seafood sector.

There were other factors, including the tensions created by the SA Marine Scalefish Fishery management reform and the appointment of Ministerial advisory bodies that were seen as a direct path to the Minister. The WFSA Board asked the EO and Chair to wind-up WFSA. However, they also asked the EO and Chair to explore with all SA stakeholders, including commercial fishers, processors, PIRSA, SIA and FRDC how to develop a pathway to develop a completely new peak body for SA.

With the impending wind up of WFSA, it is timely to firstly, assess the need for a new peak industry body, and secondly, as part of that assessment, acknowledge the role of existing structures for consultation and representation at the individual fishery sector level. For example, there are management advisory committees for a number of fishery sectors, along with tasked working groups to deal with specific fishery management issues, such as the development and implementation of harvest strategies and reform of the Marine Scalefish Fishery.

It is important to recognise that South Australia already has sound legislation in place (*Fisheries Management Act 2007* – although it may need review and updating); it also has considerable regulation in support of the Act, along with management plans for individual fisheries – most of which have recently been reviewed and updated, including the incorporation of updated harvest strategies. Finally, SA has key policies in place covering:

- Co-management
- Allocation
- Harvest Strategy Development

Discussion

The critical questions to be addressed are set out in the cover page to this document, and in answering those questions, it is relevant to point out what challenges, threats and opportunities are considered to require attention from a National, whole of State and industry perspective such as:

- Biosecurity issues e.g. proposed SA Biosecurity Act
- Native Title considerations
- Marketing/export challenges
- Access security
- Social licence
- Resource sharing
- Cost Recovery policy and administration
- Environmental challenges, including pollution, extreme weather events etc.
- Marine Parks
- Sustainability of key fish stocks
- Seismic surveys and oil/gas drilling
- SA Productivity Commission inquiry on fisheries/aquaculture regulation

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- Shipping
- The new Seafood Growth Plan

There are equally opportunities for promoting the importance of the Seafood Industry to the SA economy, and particularly regional SA. Picking up and promoting such opportunities will add significantly to the reputation and credibility of the Industry.

So is it necessary to have a peak industry body at the State level?

Possible objectives for a peak body might be to:

- a) Provide a collective and representative voice for the SA Seafood Industry to develop policy positions on issues critical to the future of the Industry – issues such as regulation and policy which impact on the Industry's bottom line;
- b) Create and support sustainable fisheries;
- c) Promote initiatives aimed at encouraging identified future leaders to take on the responsibility of protecting and promoting the Industry's future;
- d) Advance the interests of the SA Seafood Industry to government, the community, the media and other key stakeholder groups via community education and awareness programs and marketing strategies;
- e) Build positive and constructive relationships with government, relevant public sector agencies, the media and the community;
- f) Lobby on behalf of the Industry to influence government policy to benefit Industry, by contributing to the development of effective and efficient policy positions;
- g) Promote and profile the Industry and its products to the community and consumers.
- h) Consider barriers to trade and market access; and
- i) Link with other State peak bodies and SIA to provide a united industry voice on National issues.

What is the best structure for a peak industry body?

It is important for the SA Seafood Industry to consider having a peak industry body able to provide expert input and exert influence on the SA and Federal Governments to address and hopefully resolve the challenges and threats set out above. In particular, it is critical that the Seafood Industry achieves a firm foundation for the future and does not suffer unnecessarily from government decisions or campaigns against the Industry from NGOs or people who are simply opposed to commercial fishing and aquaculture. And we all have had experience of "social media" programs directed against the Industry. If it is agreed to move ahead with formation of a peak industry body, the Industry needs to consider options as to how such a body should be structured.

Options include:

A structure that involves the formation of a properly constituted peak industry body with a Constitution, competent and professional Board, Board Chair and Chief Executive. Structures include incorporated association models, ASIC-registered companies,

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companies limited by guarantee and not-for-profit companies. Various structures have been adopted by the Western Australian Fishing Industry Council (WAFIC), Seafood Industry Australia (SIA), the NSW Professional Fishermen's Association (PFA), Commonwealth Fisheries Association (CFA) and the Australian Council of Prawn Fisheries (ACPF) peak industry bodies. Regardless of which structure is adopted, such organisations require considerable resources (budget) to operate effectively, and they are not always universally supported. Pursuit of these options will no doubt need extensive consultation and will generate considerable debate, particularly in relation to the funding required.

In relation to a Constitution, in addition to the normal governance arrangements, it will need to consider:

- Objectives of the peak industry body
- Position of the Chair
- Position of the Chief Executive Officer
- The Board membership, number of Board members, the selection/election process and whether to include outside expertise
- Secretariat support
- Funding, including membership fees etc.
- Incorporation

It would also be important to have a procedure for the conduct of meetings to ensure proper record keeping, management of conflicts of interest etc. and incorporate the development of a Strategic Plan and Communications Strategy.

A second option would acknowledge the current cost recovery arrangements providing for co-management via Executive Officers who undertake the majority of operational matters on behalf of individual fishery sectors. Certainly these sectors would not want a peak industry body moving into their territory.

This option for a structure involves a more "minimalist" approach, such that the financial cost is not over bearing and issues are dealt with on a case by case basis. One way of doing this might be to establish a Peak Seafood Forum, comprising the Executive Officers of each of the key seafood sectors, meeting quarterly or as required to address significant strategic or policy issues chaired by an independent chair, with secretariat support. Of course, such a forum should also benefit from the presence and input from the Presidents of Industry Associations as appropriate.

Given the PIRSA Executive Director, Fisheries and Aquaculture currently holds quarterly meetings with Executive Officers of Industry Associations, it might be possible to organise meetings of a "minimalist" body prior to that meeting to determine its views on the agenda items to be discussed (as well as nominate items of importance to Industry).

The key question is how this body would be structured and who (which position – the independent chair?) would be responsible for communicating the Industry position on sometimes sensitive issues, i.e. it could be a formal arrangement with something akin to a Constitution to support it, or an informal forum able to provide a combined industry position on key issues similar to the National Fisheries Forum that was a loose

Seafood Industry Workshop 12 July 2021

arrangement of state peak bodies that operated in the absence of a national peak body until SIA was formed.

The third option is somewhere in between the above two.

Membership eligibility

Membership of the peak body, including eligibility of membership will need to be considered –

- Commercial Fishery licence holders – State and Commonwealth
- Aquaculture licence holders
- Processing and marketing
- Retail
- Individual fishing companies
- Others with an interest in the Seafood Industry and committed to the objectives of the peak body
- Should membership be region based? Fishery based? Elected? Selected? Have external expertise? Or a combination of these?

Funding

The \$64,000 question, and an issue which will most certainly determine the support (or otherwise) for a new peak body, its structure and membership is how will the peak body be funded? The first option outlined above will require a considerable financial outlay, which will no doubt turn off many in the industry, particularly at a time when some fisheries are facing difficulties as a result of Covid, trade disruption or reform. This issue needs to be further fleshed out, but it is critical to further progress.

Richard Stevens
July 2021

Workshop Agenda

SEAFOOD INDUSTRY WORKSHOP

AGENDA

1:00pm Monday 12 July 2021

National Wine Centre - Corner of Hackney Rd & Botanic St, Adelaide

1.	Welcome, Acknowledgement of Country and Opening Remarks	Chair
2.	Presentation by Dr Ian Knuckey Fishwell Consulting - <i>Review of structural and funding options for a peak body for the Queensland seafood industry</i>	Dr Ian Knuckey
3.	<p>Debate and discussion on the 7 key topics -</p> <p>3.1 <i>Is there a need for a peak industry body at the State level and if so, what are the drivers/ reasons for having one?</i></p> <p>3.2 <i>Is there shared vision and strong industry support for establishing a peak industry body?</i></p> <p>3.3 <i>What should be the objectives and scope of a State Peak Industry body?</i></p> <p>3.4 <i>What would be the best structure for that body including paid staff and governing body?</i></p> <p>3.5 <i>Who will qualify for membership?</i></p> <p>3.6 <i>How will it be funded?</i></p> <p>3.7 <i>What, if any, links should there be with other seafood industry bodies including Seafood Industry Australia?</i></p>	Chair/Attendees
4.	Workshop outcomes/Next Steps	Chair
5.	Meeting close	

Workshop invite list

SEAFOOD INDUSTRY WORKSHOP 12 JULY 2021

INVITE LIST

Name	Fishery/Organisation
Richard Stevens	Facilitator
Merilyn Nobes	Secretariat
Ian Knuckey	Fishwell Consulting
Brian Jeffriess	CEO ASBTIA
Gavin Begg	ED Fisheries and Aquaculture
Kyri Toumazos	EO SANZRLFA
Iain Evans	SANZRLFA
Simon Rowe	SANZRLFA
James Moriarty	SANZRLFA
Les Polkinghorne	SANZRLFA
Roger Rowe	NZRLF
Craig Fletcher	MSF
Bart Butson	President MSNFA
Tim Harding	SEPFA President
David Manser	SARLAC Director
Nathan Kimber	Executive Officer, SEPFA and SARLAC
Michael Violante	Seafood Works - Manager
Vincent Violante	Seafood Works - Owner
Catherine Sayer	Chair of the MFA (and Food SA)
Gary Morgan	EO MFA
Barbara Venn	MFA
Chris Manners	MFA
Ian Mitchell	Safcol Central Fish Market
Franz Knoll	Barossa Fine Foods
Tracy Hill	SFA
Glen Hill	SFA
Zane Skrypek	President SFA
Neil MacDonald	EO SFA, Charter and SVGPBOA
Jim Raptis	President SVGPBOA
Christopher Izzo	FRDC
Kate Birch	General Manager, Ferguson Australia Group
Andrew Ferguson	Ferguson Australia Group
Adam Main	Australian Sustainable Seaweed Alliance and CH4 South Australia
Michael Tokley	EO Central Zone Abalone
Jim Feng	Siv Kean Hok /Jim Feng Investment Pty Ltd
Roger Edwards	Goolwa Pipi Co.

SEAFOOD INDUSTRY WORKSHOP 12 JULY 2021

INVITE LIST

Veronica Papacosta	CEO Seafood Industry Australia
Dennis Holder	Blue Crab Fishery
David LeCornu	Kangaroo Island Marron
Tom Di Vittorio	President Charter Boat Association
Paul Watson	EO Sardine Association- SASIA
Sean Kalling	President SASIA
Clinton Scharfe	Member SASIA
Tom Consentino	EO SABCFA
Tom Robinson	Managing Director Goolwa Pipi Co.
Thomas McNab	AIASA President
Dr Nicole Hancox	AIASA Executive Officer
Jared Nichol	Robarra Barramundi Farm
Damien Cappel	Thomas Cappel Seafoods
Justin Phillips	Limestone Coast Co-op
Rick Mezic	SA Seafood Express
Andy Dyer	EP Seafoods
Christopher Royans	CZAF
Claire Webber	ASBTIA
David Brown	Cleanseas
Ebrahim Bidhendi	SAFCOL
Glenn Davis	SG&WCPFA
Jarrad Barnes	Blue Crab Fishery
Jo Kelly	Australian Seaweed Institute
KI Fresh Seafoods	KI Fresh Seafoods
Konrad Czypionka	Cleanseas
Lissi Whyte	Vater Group
Lynlee Lowe	OystersSA
Rob Gratton	Cleanseas
Arthur Martel	SZAF
Tom Hyde	Yumbah

Appendix 3 - Workshop

Workshop Participants

Name	Fishery/Organisation	Present
Richard Stevens	Facilitator	✓
Merilyn Nobes	Secretariat	✓
Ian Knuckey	Fishwell Consulting	✓
Brian Jeffriess	CEO ASBTIA	✓
Gavin Begg	ED PIRSA Fisheries and Aquaculture	✓
Kyri Toumazos	EO SANZRLFA	✓
Iain Evans	SANZRLFA	✓
Simon Rowe	SANZRLFA	✓
Les Polkinghorne	SANZRLFA	Z*
Roger Rowe	NZRLF	✓
Craig Fletcher	MSF	✓
Bart Butson	President MSNFA	✓
Tim Harding	SEPFA President	✓
David Manser	SARLAC Director	✓
Nathan Kimber	Executive Officer, SEPFA and SARLAC	✓
Michael Violante	Seafood Works - Manager	✓
Vincent Violante	Seafood Works - Owner	✓
Catherine Sayer	Chair of the MFA (and Food SA)	✓
Gary Morgan	EO MFA	✓
Barbara Venn	MFA	✓
Chris Manners	MFA	✓
Ian Mitchell	Safcol Central Fish Market	✓
Franz Knoll	Barossa Fine Foods	✓
Zane Skrypek	President SFA	✓
Neil MacDonald	EO SFA, Charter and SVGPBOA	✓
Adam Main	Australian Sustainable Seaweed Alliance and CH4 South Australia	✓
Michael Tokley	EO Central Zone Abalone	Z*
Jim Feng	Siv Kean Hok /Jim Feng Investment Pty Ltd	✓
Roger Edwards	Goolwa Pipi Co.	✓
Veronica Papacosta	CEO Seafood Industry Australia	Z
Dennis Holder	Blue Crab Fishery	✓
David LeCornu	Kangaroo Island Marron	✓
Tom Di Vittorio	President Charter Boat Association	✓
Paul Watson	EO Sardine Association- SASIA	✓
Tom Consentino	EO SABCPFA	✓
Tom Robinson	Managing Director Goolwa Pipi Co.	✓
Thomas McNab	AIASA President	✓
Nicole Hancox	AIASA Executive Officer	Z*
Jared Nichol	Robarra Barramundi Farm	✓
Damian Cappel	Thomas Cappel Seafoods	Z*
Simon Clarke	SG&WCPFA	Z*
Hugh Bayly	MSF	✓
		* Joined via Zoom

Workshop Notes

SEAFOOD INDUSTRY WORKSHOP

1:00pm Monday 12 July 2021

National Wine Centre - Corner of Hackney Rd & Botanic St, Adelaide

NOTES FROM THE WORKSHOP

1. Welcome, Acknowledgement of Country and Opening Remarks

The facilitator of the workshop, Richard Stevens, began the meeting with an Acknowledgement of Country and welcomed everybody and thanked them for attending. (Refer **Attachment 1** for List of Invitees and **Attachment 2** for List of Attendees). The facilitator expressed his appreciation to FRDC for providing funding to enable the workshop to proceed.

The facilitator advised that this is a forum for the SA Seafood Industry to discuss and decide the direction it wants to take with a peak body. Richard referred to his background paper which was distributed to invitees prior to the workshop (Refer **Attachment 3**).

The facilitator acknowledged that there is always a tension between supporting a well-run representation structure and believing that the money may be being wasted because there are no threats. The truth is only revealed when the peak body is not there anymore and the wheels start to fall off and the cost of fixing it is much more than the cost of preventing the problem in the first place.

Importantly, the success of any outcome which supports a peak body will turn on the commitment and capacity of the people that put their hands up to make it work.

The other key considerations are – how will it be funded and who will it be representing?

The facilitator advised that he expected that the outcome from the workshop will be a clear indication as to whether there is support for the formation of a peak industry body for the Seafood Industry in SA (aquaculture, post-harvest and wildcatch), or if the individual seafood sectors would prefer to continue the current arrangements or establish their own representative bodies.

Subject to the outcome mentioned above, and in the event that there is support for a new peak body, further more detailed work will need to be undertaken to determine the nature of the peak industry body, its governance structure, how it is to be funded (including possible options for funding), eligibility for membership etc.

2. Presentation by Dr Ian Knuckey Fishwell Consulting - Opportunity for a peak body for the Queensland seafood industry

Dr Ian Knuckey of Fishwell Consulting presented information on a recent FRDC funded project - *Opportunity for a peak body for the Queensland seafood industry* (Refer **Attachment 4** for copy of the presentation).

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3. Debate and discussion on 7 key topics -

The facilitator advised that he wished the workshop to consider seven key topics regarding the need for a seafood industry peak body and these were discussed as follows -

3.1 Is there a need for a peak industry body at the State level and if so, what are the drivers/ reasons for having one?

The facilitator read out a letter from the Minister for Primary Industries and Regional Development, Hon David Basham, dated 5 July 2021 supporting the Workshop.

The following key issues emerged during discussion of this topic -

- Important to have a united voice
- Need to have someone to represent the industry to Minister and government
- Ministers do not want to deal with multiple groups
- Need someone to constantly educate Ministers etc. as they have little or no expertise relating to the industry
- Smaller associations don't have the clout needed to get good outcomes from the Government
- Broad membership should be included e.g. recreational and indigenous
- Need appropriate skills and expertise on a peak body board
- Need a defined role for the peak body
- Broader policy issues not day to day operational issues should be managed by the peak body
- Difficult to get a united position on matters due to conflicting interests
- Maybe the existing EOs could do the job

Whilst there were some who were not yet convinced of the need for a peak body, and others who wanted to see the details of the preferred model (structure, funding membership etc.) before supporting a peak body, on balance, a majority were prepared for the work to be done to take the project to the next stage of working through the detail.

3.2 Is there shared vision and strong industry support for establishing a peak industry body?

The following key issues emerged during discussion of this topic -

- Need to decide its role first
- Varying views between 'Rolls-Royce' model and minimalist approach
- Look at CFA model
- Should be staged approach to be developed by the EOs

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- Aquaculture and Post-harvest not represented by EOs – how do we include them?
- Need extra funding for EOs if additional work to be taken on
- Need to be able to afford the new body
- Stepped approach to assess capability
- Need a working Group to flesh out best model

As with 3.1 above, there were a variety of views, but attendees were prepared for a Working Group to take the project to the next stage, then make an informed judgement.

3.3 What should be the objectives and scope of a State Peak Industry body?

The following key issues emerged during discussion of this topic -

- Push for recreational catch to be monitored – secure access and sustainability
- How do we rebuild, manage and invest in the industry? Need united voice to present issues to government
- Need good advocacy to government – currently undertaken by EOs who generally don't get much traction - try not to get ambushed by decisions
- Need to engage the media – one voice – consistent message
- Need to build a brand
- Promote through retail outlets
- Peak body should consider broader policy issues e.g. OHS, seismic surveys, marine parks, product promotion, securing access

As can be seen above, there were a variety of views expressed, but no coming together at this stage as to what the objectives and scope should be. This will require further thought and assessment by a Working Group.

3.4 What would be the best structure for that body including paid staff and governing body?

The following key issues emerged during discussion of this topic -

- Use existing Association structures
- Map out gaps - don't duplicate
- Look at expertise based board e.g. WAFIC model
- Need to ensure the body is independent of government
- Look at EO advisory committee and separate marketing/ industry promotion group
- Wildcatch failed due to lack of adequate funding – levy structure and proper staffing important

Again there was no clear consensus on this topic, mainly because attendees wanted to know what the funding, preferred model etc. might look like before making a decision.

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3.5 Who will qualify for membership?

The following key issues emerged during discussion of this topic -

- Independent Chair needed
- Need to include all seafood sectors including marketers, processors, aquaculture and consumers
- Rather than including all stakeholders may meet with them on a regular basis e.g. WAFIC model
- Maybe Association/ management processes can be improved and streamlined e.g. Super MAC
- Government should pay costs of recreational members
- Difficult to include fish processors due to a lack of a peak body
- Need champions from each sector
- Need better communication between sectors
- Need to get right people around the table

A variety of views, but there was a general consensus that it should be a broadly based membership able to represent the best interests of the SA Seafood Industry.

3.6 How will it be funded?

The following key issues emerged during discussion of this topic -

- Voluntary vs compulsory contributions?
- GVP based?
- Can't run just on membership fees other funding is needed – look at SIA model
- Need to look for other seafood sectors to contribute not just wildcatch
- Investigate government funding for start up

This was probably one of the more challenging topics, and support for a particular option will be determined by the outcome of a Working Group's deliberations on a preferred model, structure, membership etc.

3.7 What, if any, links should there be with other seafood industry bodies including Seafood Industry Australia?

The following key issues emerged during discussion of this topic -

- Important to communicate with other groups and national body
- Link in with other like sectors e.g. primary producers

There was general agreement that links with bodies such as CFA and SIA were an essential requirement for a State peak body.

4. Workshop outcomes/Next Steps

SEAFOOD INDUSTRY WORKSHOP

Whilst there were differing views expressed on a number of the key items listed above (and this was only to be expected), there was in principle support for a seafood peak industry body and to progress to Stage 2 of the FRDC project. To progress this it was agreed that a Working Group of the following persons be established to flesh out the possible establishment of a seafood peak body –

- Franz Knoll (Chair)
- Richard Stevens
- Kyri Toumazos
- Catherine Sayer
- Damien Cappel
- Adam Main
- Brian Jeffriess
- Neil MacDonald
- Marilyn Nobes

The facilitator reminded participants to complete the survey distributed prior to the workshop by the end of the week (16 July 2021). The survey will be sent out again.

The facilitator suggested that the aim should be to have Stage 2 completed by December 2021, when a second workshop would be convened to consider the Working Group recommendations and hopefully adopt a preferred model incorporating agreed structure, funding, membership criteria etc.

5. Meeting close

The meeting closed at 4.35pm

NOTE: Following the workshop and discussions with Dr Patrick Hone of FRDC, it has been agreed that Dr Ian Knuckey will take over as Principal Investigator for Stage 2, with Richard Stevens as the Co-Investigator. Their role will be to work hand in hand with the Working Group to address the issues raised at Monday's workshop and bring back options/proposals for further consideration by Industry.

Appendix 4 – Steering Committee Meetings

Meeting 1



South Australian Peak Industry Body Meeting

Wednesday 27th October 2021, 1:00 to 3.00pm (ACDT)

Online <https://us02web.zoom.us/j/87806440649>

Agenda		
Item	Key Issues	Time
Welcome and Overview	<ul style="list-style-type: none"> • Welcome and apologies • Summary of last workshop outcomes (Richard Stevens) • What do we want from today? 	1.00pm
Member survey?	<ul style="list-style-type: none"> • Draft SA Peak Body survey has been distributed <ul style="list-style-type: none"> – Is this worth pursuing? – If not, how do we get good industry input into the requirements of the SA Peak body? – If so, does it need to be modified for each sector? How? 	1.15
Sector feedback	<ul style="list-style-type: none"> • Feedback from members of different sectors (5 minutes each) <ul style="list-style-type: none"> – How do you want to move forward with the next phase? – What do you see as biggest hurdles? How to overcome? – What do you see as biggest opportunity? How to achieve? 	2:00
Other Issues	<ul style="list-style-type: none"> • How do you legitimize the association with members, agencies, stakeholders, community? 	2.30
Next steps	<ul style="list-style-type: none"> • What do you want from Project Phase 2? • Communication Plan – how do we communicate 	2.45
Meeting Close		3.00

SA PEAK INDUSTRY BODY STEERING COMMITTEE

Meeting 1 - 1:00pm Wednesday 27 October 2021
Via Zoom

1. Welcome, Apologies and Opening Remarks

Present

Franz Knoll (Chair)

Ian Knuckey (Principal Investigator)

Richard Stevens (Co-Investigator)

Kyri Toumazos

Damian Cappel

Adam Main

Brian Jeffriess

Neil MacDonald

Chris Izzo (FRDC)

Merilyn Nobes (Executive Support)

Apologies

Catherine Sayer

The Chair of the South Australian Peak Industry Body Steering Committee (Steering Committee) Franz Knoll welcomed everybody and thanked them for attending.

The Chair advised that the Steering Committee has been established to discuss the outcomes from the Seafood Industry Workshop held on 12 July 2021 and progress the establishment of a seafood peak industry body for SA.

Richard Stevens provided a summary of the outcomes from the Workshop and advised that whilst there were differing views expressed on a number of the key items there was in principle support for a seafood peak industry body and to progress to Stage 2 of the FRDC project.

Further more detailed work will need to be undertaken to determine the nature of the peak industry body, its governance structure, how it is to be funded (including possible options for funding), eligibility for membership etc.

Richard advised that he is continuing to meet with and encourage those sectors which were not members of the previous peak industry body to participate in this development process.

Ian Knuckey advised that there is a previously set deadline of December this year to hold a second workshop and the Steering Committee needs to consider a path to this workshop.

SA PEAK INDUSTRY BODY STEERING COMMITTEE

2. Industry Survey

Members noted the draft industry survey distributed prior to the meeting by Dr Knuckey and discussed whether or not to pursue this approach, including who it should be sent to and how it will be distributed. If Industry can agree on a preferred peak body structure or model it will assist in moving the project along more quickly.

The Steering Committee agreed that there appeared to be little appetite from Industry at the Workshop for a higher cost model but there seemed to be support for using existing frameworks and resources to address cross-sectorial and strategic issues. Executive Officers and other key contacts meet on a quarterly basis with the Executive Director, Fisheries and Aquaculture and it was suggested that Industry could 'piggy back' on this arrangement to consider industry wide issues prior to these meetings. It was noted that if this approach is adopted that there may need to be an expansion of invitees to the PIRSA meetings to ensure all sectors are covered. It was noted that such an approach would still require a Chair or President and executive support.

It was agreed that the survey be proceeded across all sectors (excluding the recreational sector as this group is already represented through MRFAC) but it be modified to cater for the alliance type model approach only. All sectors are to be surveyed i.e. wildcatch, aquaculture (SBT, kingfish, mussels, oysters, seaweed and other and marketers and retailer.

3. Next Steps

- a) Ian Knuckey to amend draft survey in line with comments of the Steering Committee and distribute to members for comment.
- b) Ian Knuckey to speak to FRDC regarding funding for Stage 2 of the Project.
- c) Once funding confirmed Marilyn Nobes to organise venue etc. for Forum.
- d) Marilyn Nobes and Richard Stevens to draft covering note to accompany survey. Franz Knoll to be the signatory.
- e) Marilyn Nobes and members to ensure contact list covers all relevant people and organisations.
- f) Franz Knoll to speak to SAFCOL re project and who the survey should be sent to.
- g) Meeting notes to be distributed to all members.
- h) Survey to be sent by Marilyn Nobes to EOs and key contacts asking them to distribute to their members. Two weeks for response.
- i) Need to consider funding options – Richard Stevens to meet with Gavin Begg re collection of co-management contributions through licence fees.
- j) Need to be clear what is the role of the peak body and what will they provide?

SA PEAK INDUSTRY BODY STEERING COMMITTEE

- k) Need to determine what the value proposition for the various groups is – what will they get from being a member?

4. Next Meeting

Steering Committee – 2 December 2021 after the PIRSA EO meeting which is being held from 10.00am to 1.00pm

Forum – 15 December 2021

5. Close

The meeting closed at 2.30pm

Meeting 2

SA PEAK INDUSTRY BODY STEERING COMMITTEE

Meeting 2 - 11:30am Monday 13 December 2021
Via Zoom

1. Welcome, Apologies and Opening Remarks
2. Minutes from previous meeting held on 27 October 2021 and Actions
3. Industry Survey – Presentation by Dr Ian Knuckey
4. Next Steps - Forum
5. Next Meeting
6. Close

Join Zoom Meeting

<https://us02web.zoom.us/j/86118108131?pwd=TDFGa1BoM243VjVMTGgxcUlzakdPUT09>

Meeting ID: 861 1810 8131

Passcode: 225688

One tap mobile

+61871501149,,86118108131#,,, *225688# Australia

+61280156011,,86118108131#,,, *225688# Australia

SA PEAK INDUSTRY BODY STEERING COMMITTEE

Meeting 2 - 11:30am Monday 13 December 2021
Via Zoom

1. Welcome, Apologies and Opening Remarks

Present

Franz Knoll (Chair)

Ian Knuckey (Principal Investigator)

Richard Stevens (Co-Investigator)

Kyri Toumazos

Catherine Sayer

Neil MacDonald

Chris Izzo (FRDC)

Merilyn Nobes (Executive Support)

Apologies

Brian Jeffriess

The Chair welcomed everybody and thanked them for attending.

2. Minutes from previous meeting held on 27 October 2021 and Actions

The Minutes of the meeting held on 27 October were noted and the Chair went through the action items arising from that meeting. All actions from the last meeting have been completed except for holding the Industry Forum which has now been deferred and will be discussed later in the meeting.

3. Industry Survey – Presentation by Dr Ian Knuckey

Dr Knuckey presented the results of the industry survey and it was noted that 53 responses have been received so far. The respondents generally supported the establishment of a peak industry body and responses identified likely gaps in the provision of service to industry (such as cost recovery/licence fees/ advocacy) that a State peak body could undertake. Members agreed that it would be beneficial to try and get more responses to the survey and agreed it be left open until 21 January 2022 and that everyone do as much as they can through their networks to encourage further responses.

4. Next Steps

Richard Stevens advised that he has met with some industry leaders in sectors which were not previously part of Wildcatch Fisheries SA and they are keeping an open mind at this stage but want value for money and an organisation with a clearly defined role.

Further more detailed work needs to be undertaken before the forum to determine the nature of the peak industry body, its governance structure and role, how it is to be funded, eligibility for membership etc.

SA PEAK INDUSTRY BODY STEERING COMMITTEE

Members were advised that PIRSA appear to be willing to collect co-management fees through licence fees for a peak industry body if industry shows its support for such a body.

The following next steps were agreed –

- Dr Knuckey to keep survey open until 21 January 2022 and Steering Committee members to further encourage completion of the survey through their networks. Link to be resent to members.
- Dr Knuckey to provide a summary of the survey results at the next Industry forum, including an analysis of likely gaps in the provision of service to industry.
- Catherine Sayer and Franz Knoll to liaise and, if possible, meet with the Minister before Christmas to provide an update on the process and suggest that a new peak body could be used to assist in the roll out of the new Seafood Plan;
- Franz Knoll speak to Primary Producers SA regarding the recent government support they received, including on what basis.
- An Industry Forum be held at 1.30pm on Friday 4 February 2022 at PIRSA West Beach (Venue booked);
- Dr Knuckey to prepare a 1 or 2 page summary for presentation at the next meeting identifying key service gaps (those services not currently provided by SIA or Industry Associations); and
- Franz Knoll to prepare advice to Industry regarding progress.

5. Next Meeting

The next is to be held during the week commencing 10 January 2022 (Doodle poll to be sent to members)

6. Close

The meeting closed at 12.45pm

SA PEAK INDUSTRY BODY STEERING COMMITTEE

Meeting 3 – 3.00pm Thursday 13 January 2022
Via Zoom

1. Welcome, Apologies and Opening Remarks

Present

Franz Knoll (Chair)

Ian Knuckey (Principal Investigator)

Richard Stevens (Co-Investigator)

Brian Jeffriess

Catherine Sayer

Damian Cappel

Merilyn Nobes (Executive Support)

Apologies

Kyri Toumazos

Neil MacDonald

Adam Main

Chris Izzo (FRDC)

The Chair welcomed everybody and thanked them for attending.

2. Minutes from previous meeting held on 13 December 2021 and Actions

The Minutes of the meeting held on 13 December were noted and the Chair went through the action items arising from that meeting. All actions from the last meeting have been completed except for holding the Industry Forum which has now been deferred and will be discussed later in the meeting.

3. Industry Survey – Dr Ian Knuckey

Dr Knuckey advised that only three more surveys have been filled out since early December and there are still very few responses from some of the larger fisheries. The respondents generally supported the establishment of a peak industry body and responses identified likely gaps in the provision of service to industry (such as cost recovery/licence fees/ advocacy) that a State peak body could undertake. Members agreed that it was unlikely that any further responses would be received now but thought that the poor response rate wasn't necessarily an indicator that there is lack of support for a peak industry body. It also had to be taken into account that in SA, fishers often hold multiple licences both in the same fishery and/or between fisheries and fisheries/aquaculture. For example, tuna farmers hold a large number of licences in prawns, sardines, lobster, and marine scale.

4. Meeting with the Minister – Report from the Chair

Meeting 3

SA PEAK INDUSTRY BODY STEERING COMMITTEE

Meeting 3 – 3.00pm Thursday 13 January 2022
Via Zoom

1. Welcome, Apologies and Opening Remarks
2. Minutes from previous meeting held on 13 December 2021 and Actions
3. Industry Survey – Advice from Dr Ian Knuckey
4. Meeting with the Minister – report from the Chair
5. Next Steps - Forum
6. Next Meeting
7. Close

Join Zoom Meeting

<https://us02web.zoom.us/j/86158866512?pwd=djF1UklJb3NoOXFhYWx4dEpveW03UT09>

Meeting ID: 861 5886 6512

Passcode: 697736

One tap mobile

+61871501149,,86158866512#,,,,*697736# Australia

Dial by your location

+61 8 7150 1149 Australia

Meeting ID: 861 5886 6512

Passcode: 697736

Find your local number: <https://us02web.zoom.us/j/86158866512?pwd=djF1UklJb3NoOXFhYWx4dEpveW03UT09>

SA PEAK INDUSTRY BODY STEERING COMMITTEE

The Chair advised that the Minister was positive about the concept of Seafood SA i.e. bringing together all seafood sectors and providing a united voice would be most beneficial. It is important that the role of the organisation represent industry in areas not serviced by industry associations or SIA. He suggested it was important to get the structure of the new organisation right and a meeting with Primary Producers SA CEO Caroline Rhodes has been arranged for 18 January.

The Minister also advised that a co-management model is needed and that it is preferable that all sectors support the new body. He would like to see a proposed budget for the new body and evidence of industry support.

5. Next Steps

Members agreed that more detailed work needs to be undertaken to determine the nature of the peak industry body, its governance structure and role, how it is to be funded, eligibility for membership etc.

The following next steps were agreed –

- Franz Knoll to meet with Primary Producers SA.
- Dr Knuckey, in conjunction with Richard Stevens, prepare a proposal detailing the proposed role of the peak industry body, its governance structure, how it is to be funded (including a proposed budget, options on how much and how each sector might contribute), eligibility for membership etc. by 31 January 2022 and distribute it to Steering Committee members for comment.
- Proposal to be presented to a meeting of Association EOs and Presidents following finalization of the draft and then to be distributed to the wider industry.

6. Next Meeting

To be advised.

7. Close

The meeting closed at 4.10pm

Appendix 5 – Industry survey

South Australian Peak Industry Body

Background

Following the wind up of Wildcatch Fisheries in June 2021, an Industry Forum was organised and held on 12 July 2021 to gauge support for the formation of a new Peak Industry body to represent the interests of the SA Seafood Industry to Government, its agencies, other stakeholders and the community. At this Forum, key fishing and seafood stakeholders gave in-principle support for a SA seafood peak industry body. They did, however, acknowledge that there were a range of views about what such a body would do, what membership it might comprise, how it might be structured, what links it might have with other peak industry bodies, and how it could be funded.

The Fisheries Research and Development Corporation (FRDC) funded Phase II of the SA Peak Industry Body Project to assist in resolving these issues and explore potential options for a new organisation to unify and support the industry into the future. A Steering Committee was appointed which met on 27 October 2021 to address the issues raised at the July Industry Forum, and to provide advice and direction on next steps. The Steering Committee agreed that there was a need to “test the waters” on a number of key issues associated with the development of a new SA Seafood Industry peak body.

As part of this process, this survey was prepared to find out from grass roots industry what they think is best for the wildcatch, aquaculture and broader seafood industry.

As you all know, operating in the seafood industry is not getting any easier. Administrative burdens are increasing, costs are rising, and the expectations and impacts from other stakeholders are an ongoing issue that will not go away. Some of these burdens (e.g. logbooks, personnel, day-to-day operations, BAS etc) you just have to wear as part of your individual business. Other issues (e.g. management plans, research, compliance etc.) you may expect to be dealt with by your own industry association. But there are some higher-level issues you may need help with (e.g. government policy, MPAs, access, labour laws, food safety etc) where a peak industry body could meet the needs of many small businesses or associations such as your own. If such an organisation could be useful, what structure would best suit your needs? How would it operate? How could it be funded? This is what we are trying to find out in this survey.

For the sake of using a name, we have termed this potential new association as “Seafood SA” throughout the survey. The only way that “Seafood SA” can be successful is if it provides ‘good value’ to its members. To understand this, we need as many people as possible from the fishing and seafood industry to fill out this survey.

South Australian Peak Industry Body

About you

We don't need to know who you are but in this section we would like to know about your involvement in the SA Seafood Industry.

*** 1. What is your MAIN involvement in the seafood industry?**

- | | |
|--|----------------------------------|
| <input type="radio"/> Wildcatch fishing | <input type="radio"/> Importer |
| <input type="radio"/> Aquaculture | <input type="radio"/> Exporter |
| <input type="radio"/> Wholesaler | <input type="radio"/> Retail |
| <input type="radio"/> Processor | <input type="radio"/> Government |
| <input type="radio"/> Marketing | |
| <input type="radio"/> Other (please specify) | |

South Australian Peak Industry Body

About you

*** 2. What fishery are you mainly involved in?**

(You can tick more than 1)

- | | | |
|--|---|--|
| <input type="checkbox"/> Abalone fishery | <input type="checkbox"/> Giant Crab | <input type="checkbox"/> SESSF Great Australian Bight Trawl Fishery (Comm) |
| <input type="checkbox"/> Blue Crab Fishery | <input type="checkbox"/> Sardin e | <input type="checkbox"/> Souther Bluefin Tuna (Comm) |
| <input type="checkbox"/> Charter Boat Fishery | <input type="checkbox"/> Gulf St Vincent Prawn Fishery | <input type="checkbox"/> SESSF Gillent Hook and Trap Fishery (Comm) |
| <input type="checkbox"/> Lake Eyre Basin Fishery | <input type="checkbox"/> Spencer Gulf Prawn Fishery | <input type="checkbox"/> Small Pelagic Fishery (Comm) |
| <input type="checkbox"/> Lakes and Coorong Fishery | <input type="checkbox"/> Northern Zone Rock Lobster Fishery | |
| <input type="checkbox"/> Marine Scalefish Fishery | <input type="checkbox"/> Southern Zone Rock Lobster Fishery | |
| <input type="checkbox"/> Other (please specify) | | |

South Australian Peak Industry Body

About you

3. What aquaculture operations are you mainly involved in?

(You can tick more than 1)

☐ Tuna

☐ Mussel

☐ Barramundi

☐ Algae

☐ Oyster

☐ Hatchery

☐ Kingfish

☐ Sea cages

☐ Yabbie /
Marron

☐ Ponds

☐ Abalone

Other (please specify)

South Australian Peak Industry Body

Your involvement in industry associations

*** 4. Are you a member of an industry association?**

☐ Yes

☐ No

South Australian Peak Industry Body

Your involvement in industry associations

*** 5. What industry association are (were) you involved in?**

- | | |
|--|---|
| <input type="checkbox"/> Australian Southern Bluefin Tuna Industry Association | <input type="checkbox"/> Southern Zone Abalone Industry Association |
| <input type="checkbox"/> Wildcatch Fisheries SA | <input type="checkbox"/> Lakes and Coorong Fishery Southern Fisherman's Association |
| <input type="checkbox"/> Australian Barramundi Farmers Association | <input type="checkbox"/> SA Blue Crab Pot Fishers Association |
| <input type="checkbox"/> Commonwealth Fisheries Association | <input type="checkbox"/> South Australian Women's Industry Network |
| <input type="checkbox"/> The Spencer Gulf & West Coast Fishermen's Association | <input type="checkbox"/> Goolwa PipiCo |
| <input type="checkbox"/> Seafood Industry Australia | <input type="checkbox"/> Southern Shark Industry Alliance |
| <input type="checkbox"/> Great Australian Bight Industry Association | <input type="checkbox"/> Small Pelagic Fishery Association |
| <input type="checkbox"/> Marine Fishers Association | <input type="checkbox"/> Northern Zone Rock Lobster Industry Association |
| <input type="checkbox"/> Gulf St Vincent Prawn Boat Owners Association | <input type="checkbox"/> South East Professional Fishermens Association |
| <input type="checkbox"/> Abalone Industry Association of SA | <input type="checkbox"/> South Australian Rock Lobster Advisory Council |
| <input type="checkbox"/> Central Zone Abalone Industry Association | <input type="checkbox"/> SETFIA |
| <input type="checkbox"/> Other (please specify) | |

- ☐ Access Issues (e.g. Native title, Marine bioregional planning, MPA displacement, access rights)
- ☐ Business Issues (e.g. Labour, OH&S, Training, Sales)
- ☐ Management Issues (e.g. Environmental legislation, Fisheries policy / regulation, compliance)
- ☐ Product Issues (e.g. Biosecurity, Food safety, marketing, promotion, competition)
- ☐ External Issues (e.g. Pollution, seismic / oil&gas, Port use / facilities, Catchment / Coastal management)

Occupational Health & Safety
☐ N/A

<div> <div></div> <div>Succession planning / ageing industry</div> <div><input type="checkbox"/></div> <div>N/A</div> </div>
<div> <div></div> <div>Labour</div> <div><input type="checkbox"/></div> <div>N/A</div> </div>
<div> <div></div> <div>Training</div> <div><input type="checkbox"/></div> <div>N/A</div> </div>
<div> <div></div> <div>Fish price</div> <div><input type="checkbox"/></div> <div>N/A</div> </div>
<div> <div></div> <div>Insurance</div> <div><input type="checkbox"/></div> <div>N/A</div> </div>
<div> <div></div> <div>Competition</div> <div><input type="checkbox"/></div> <div>N/A</div> </div>
<div> <div></div> <div>Fuel / power / water / packaging costs</div> <div><input type="checkbox"/></div> <div>N/A</div> </div>

<div> <div> <div></div> <div></div> </div> <div>Leasing / quota costs</div> <div> <input type="checkbox"/> </div> <div>N/A</div> </div>
<div> <div> <div></div> <div></div> </div> <div>Regulatory costs</div> <div> <input type="checkbox"/> </div> <div>N/A</div> </div>
<div> <div> <div></div> <div></div> </div> <div>Regulatory complexity</div> <div> <input type="checkbox"/> </div> <div>N/A</div> </div>
<div> <div> <div></div> <div></div> </div> <div>Fisheries policy and management</div> <div> <input type="checkbox"/> </div> <div>N/A</div> </div>
<div> <div> <div></div> <div></div> </div> <div>Environmental legislation</div> <div> <input type="checkbox"/> </div> <div>N/A</div> </div>
<div> <div> <div></div> <div></div> </div> <div>Cost of management</div> <div> <input type="checkbox"/> </div> <div>N/A</div> </div>
<div> <div> <div></div> <div></div> </div> <div>Licencing arrangements</div> <div> <input type="checkbox"/> </div> <div>N/A</div> </div>

*** 10. PRODUCT ISSUES**

<input type="checkbox"/> Industry & product promotion <input type="checkbox"/> N/A
<input type="checkbox"/> Food safety <input type="checkbox"/> N/A
<input type="checkbox"/> Biosecurity <input type="checkbox"/> N/A
<input type="checkbox"/> Marketing <input type="checkbox"/> N/A
<input type="checkbox"/> Quality <input type="checkbox"/> N/A
<input type="checkbox"/> Transport / logistics <input type="checkbox"/> N/A
<input type="checkbox"/> Certification <input type="checkbox"/> N/A

11

<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div>Price</div> <div> <input type="checkbox"/> </div> <div>N/A</div>
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div>Product substitution / replacement</div> <div> <input type="checkbox"/> </div> <div>N/A</div>
<div>* 11. EXTERNAL ISSUES</div>
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div>Catchment and coastal management / development</div> <div> <input type="checkbox"/> </div> <div>N/A</div>
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div>Seismic survey activities</div> <div> <input type="checkbox"/> </div> <div>N/A</div>
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div>Pollution</div> <div> <input type="checkbox"/> </div> <div>N/A</div>
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div>Port facilities / other infrastructure</div> <div> <input type="checkbox"/> </div> <div>N/A</div>
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div>Climate change</div> <div> <input type="checkbox"/> </div> <div>N/A</div>

South Australian Peak Industry Body

Major Issues

Based on your answers to the questions above, there are a number of issues which you think are very important. Some of these issues you may want to deal with personally or within your business or through your current organisation. Other issues you might like an organisation like Seafood SA to deal with.

*** 12. Please indicate whether you would like the following issues dealt with through:**

- 1) Your own business;
- 2) Your existing or local association / cooperative;
- 3) A peak industry association.

ACCESS ISSUES

	Your own business	Your existing or local association / cooperative	Seafood SA
Bioregional Planning / MPA Displacement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access and allocation rights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Native title	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Protected species / environmental closures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment?

* 13. BUSINESS ISSUES

	Your own business	Your existing or local association / cooperative;	Seafood SA
Occupational Health & Safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fuel / power / water / packaging costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Labour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fish price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leasing / quota costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Succession planning / ageing industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment?

*** 14. MANAGEMENT ISSUES**

	Your own business	Your existing or local association / cooperative	Seafood SA
Environmental legislation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory complexity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost of management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Licensing arrangements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fisheries policy and management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment?

*** 15. PRODUCT ISSUES**

	Your own business	Your existing or local association / cooperative	Seafood SA
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Certification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Biosecurity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Industry & product promotion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transport / logistics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product substitution / replacement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment?

*** 16. EXTERNAL ISSUES**

	Your own business	Your existing or local association /cooperative	Seafood SA
Catchment and coastal development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pollution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seismic survey activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Climate change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Port facilities / other infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Industry consolidation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
External intervention into your business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment?

South Australian Peak Industry Body

Roles and Responsibilities

Seafood SA will have some key roles it can undertake for its members and a number that it probably should not. The most effective mix of these roles will be determined by the issues facing the seafood industry and may change over time. You have previously highlighted some of the current issues facing industry. Potential roles of Seafood SA might be: lobbying government; representation and advocacy; policy analysis; program development; stakeholder communication; research; consultation; information dissemination; sector development and resource allocation advice.

*** 17. Please rate the following potential roles of Seafood SA.**

	Not important	Some importance	Average importance	High importance	Very important
Lobbying government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Representation and advocacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stakeholder communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consultation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information dissemination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sector development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Resource allocation advice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

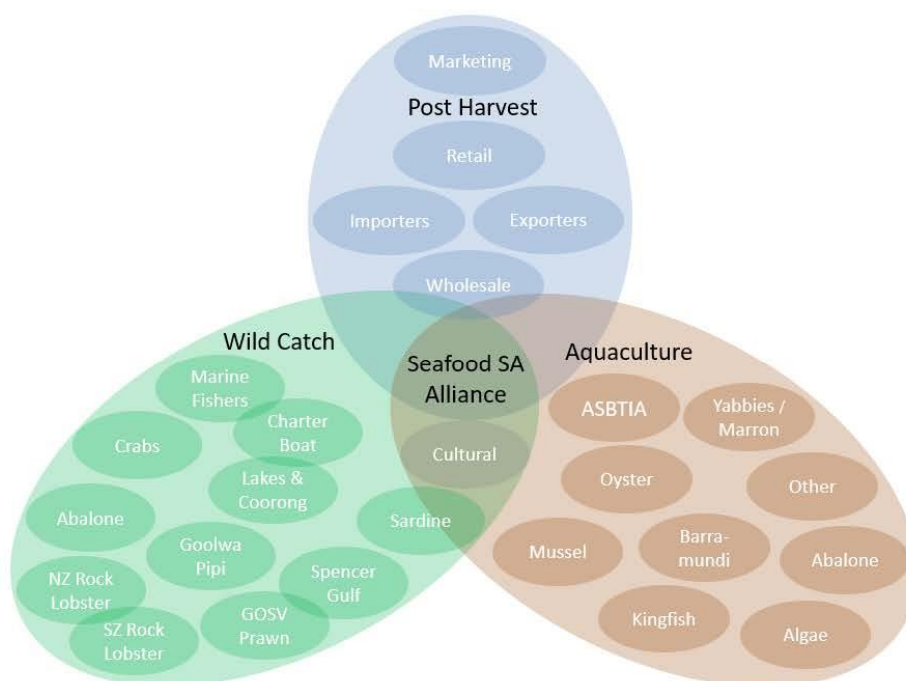
South Australian Peak Industry Body

Structure and membership

There are a range of different structures and membership arrangements to peak industry organisations and no such thing as a "one size fits all".

At its meeting on 27 October, the Steering Committee discussed a range of options for the structure of Seafood SA and agreed that the formation of all current fishing and seafood associations into an "Alliance" was the most appropriate structure at this stage. Key advantages of an alliance is that the status quo would remain for current associations but they would pool their resources on issues of mutual concern, thereby significantly reducing the administrative costs of forming a "new" peak industry association.

Seafood SA Alliance model



*** 18. Which of the following sectors do you personally think should be included in Seafood SA?**

Tick all sectors you think should be included.

☐ Wild
catch

☐ Aquacultur
e

☐ Importers

☐ Exporter
s

☐ Retail

☐ Processors

☐ Wholesaler
s

☐ Marketer
s

☐ Distributors

Other (please specify)

19. What comments do you have about this structure?

South Australian Peak Industry Body

Need an industry organisation or not?

*** 20. Do you believe the South Australian seafood industry would benefit by forming an alliance such as Seafood SA?**

- ☐ Yes
- ☐ Maybe
- ☐ No

*** 21. Please give a few brief reasons for your answer.**

Reason 1

Reason 2

Reason 3

South Australian Peak Industry Body

Funding Options

Peak organisations usually derive a significant amount of their funding from voluntary or compulsory contributions by their members or member associations. For any organisation to perform its functions it must have adequate funding and resources.

*** 22. If Seafood SA was tackling the issues you were concerned about and performing to your expectations, how would you like your Association's funding contributions to be made?**

	Definitely not	Possibly	Definitely
Compulsory contributions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Voluntary contributions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please comment

*** 23. What other funding options or income streams do you believe are available to potentially support Seafood SA?**

South Australian Peak Industry Body

End of the survey

Many thanks in taking part in this survey. We will analyse the results and make them available to all participants and the wider industry.

24. Is there anything else you'd like to share about the potential for Seafood SA?

25. If you would like to be sent the results of this survey, please enter your email address below.