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Establishing a National Peak Body for the Seafood Industry

Progress and Next Steps Report

Thursday, February 11, 2016

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Executive Summary

This report outlines progress and proposed next steps for the first major phase of the National Seafood Industry Alliance project to establish a seafood industry national peak body.

The first (scoping) phase of the project has found both a need and a level of urgency across the industry to form a national peak body. A variety of potential service needs emerged from consultations and desktop review. However, four areas stand out as representing distinct and significant value across the wider seafood industry and are most likely to respond to the demand from seafood businesses:

1. **Strengthening public perceptions** of the Australian seafood industry reputation as a professional, world class industry producing safe healthy food, guided by world's best practice sustainability principals.
    a. Supported by national relationships and collaborations with other sectors, NGO's, major customers/retailers
2. **Government relations and public policy advocacy**.
    a. Resource access, diesel fuel rebate, biosecurity, food safety, regulatory reforms
3. **Industry strategy and growth**
    a. Ensuring industry resources and services are allocated in areas that will create the most benefit for seafood businesses
        i. Without duplicating existing investment prioritisation mechanisms that are performing well
4. **Strategic issue management.**
    a. Monitor and timely response to issues that affect multiple sectors/states.

While there is a recognised need, the establishment of a national peak body is not assured. History shows that the seafood industry has struggled to form and sustain its national representation institutions. Some of the most significant lessons are:

1. Stop pursuing strategies and activities that are proven to not work or are responding to the wrong problem
    a. There is no need to continue investing in more studies about structural options for a national seafood body. They will continue to confirm what is already known
        i. The structure and the funding model are both technical issues that can and will need to be resolved.
    b. The change process is not simply 'develop a rational model supported by large/influential businesses/organisations and others will buy in'

    i. Such thinking might work within a large business where there is authority to force implementation, but change cannot be 'engineered'[1] in the same way across multiple organisations and businesses.
    ii. A logical business case for change is important, but across an industry of many independent businesses it requires an active process to get buy-in and build support for change and innovation.

2. Start concentrating more on industry leadership of a change process
    a. Create a vision for the future, establish a guiding coalition of leaders (composed of a diversity of people from different sectors, regions, size of enterprise, age, gender and so on), leverage industry networks and communications that engage people in a strategic way and help raise wide awareness about the need and urgency for change, work through a structured change process
        i. The seafood industry is a complex industry and it will take a strategic, systems approach to achieve change (which is the real problem).
    b. Work directly with seafood businesses to create a groundswell of support.
        i. When the larger businesses in the biggest seafood industries (by value) support the formation of a national peak body, it permits the start (not the end) of a widespread change process across the majority of businesses.

The learning and insights from the scoping phase have been used to prepare a project plan to implement the remaining phases. It includes updated project phases and activities; key issues for consultation; project governance and legal and administrative requirements. In addition, supporting project monitoring and evaluation, risk management and communications plans have been prepared.

Next Steps

One of the important developments will be the shift towards clear and active leadership from the industry in implementing the next phases of the project. It will involve:

- Convening an industry forum in March 2016 to confirm strategy and support to establish a peak body and
- formation of a Seafood Industry Leadership Task Force to lead the change process, including the development of the preferred business and funding models.

The Leadership Task Force would be chaired by a business leader and be established with a governance framework to clarify roles and responsibilities. It would be supported by the Project Manager who will report progress to NSIA on a regular basis. The findings of the Task Force's work would inform and justify the case for a formal decision to accelerate the completion of the project by June 2017.

Finally, the next phase will involve an increase in industry communication and engagement to raise awareness, participation and enlist support from seafood businesses to form the new peak body.

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[1] https://hbr.org/2013/10/stop-trying-to-engineer-success/

Project Introduction

Background:

The National Seafood Industry Alliance (NSIA) secured Australian Government funding via a coalition election commitment to develop an effective national peak representative body for the seafood industry. Inovact Consulting has been contracted by NSIA as project managers for the seafood industry peak body project and the first phase of the three year project is nearly complete.

Project Objectives

Industry Vision: "An established national peak body that is inclusive of the wild catch, aquaculture, post-harvest sectors and delivering valued services with members committed to ongoing funding."

Primary Project Objective: To develop and establish a national seafood industry peak body that will further develop and promote an economically, environmentally and socially sustainable seafood industry.

Overall Project Methodology

The project has applied a **'demand-based'** approach to the design and establishment of a national peak body. Such an approach greatly increases the prospects of businesses opting into and investing in an industry body. It involves gathering insights on what is needed and valued by industry businesses, and then designing the peak body business model to maximise value for money.

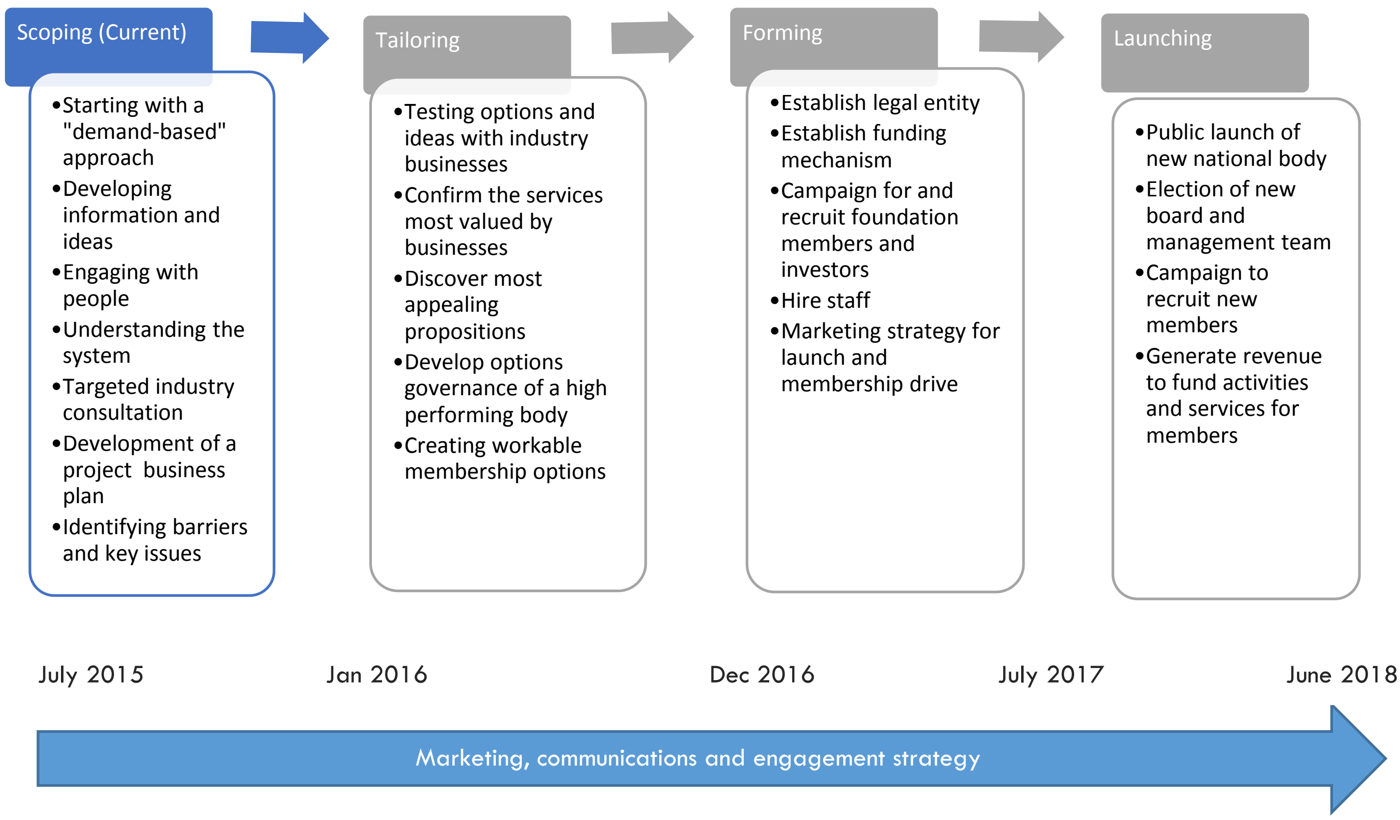
The alternative and conventional 'push' strategy is to design an ideal model and then trying to 'sell' it industry businesses. A supply driven approach has a high risk of failure with engaging people, enlisting participation and attracting sustainable funding.

The methodology includes **four major phases** of work that are spread over a three year period as defined in the funding agreement:

1. **Scoping and Direction Setting** (July 2015 – Jan 2016) - the initial phase of the project will include desktop research, connecting the project with people and organisations (through a web presence, regional visits and communications/engagement strategy), targeted industry consultation and finally the development of a market-facing business plan to form a national peak body.
2. **Tailoring a structure to industry needs** – this phase will develop and test options and ideas with industry businesses. It will:
    a. define and validate the services that are likely to be most valued by industry businesses;
    b. identify the potential structures to deliver those services efficiently and effectively;
    c. identify the likely barriers to implementation;
    d. develop the options and mechanisms for ongoing funding;
    e. develop the value proposition/s that would have most appeal to businesses; and
    f. identify workable options for membership, voting rights and the governance structure that would be required to enable high performance.

3. **Forming a new industry body** – this phase will confirm with industry the recommended structure and value proposition for the new national peak body and commence its formation. It will involve ongoing industry engagement, registration of a legal entity, appointment of an interim board and CEO and confirmation by industry of the principles to be applied in crafting a new constitution.
4. **Launching** – this phase will include a public launch of the new national body, election of the new board, appointment of management and a membership campaign to recruit members and generate revenue to fund activities and services for members.

Each phase is under-pinned by a project marketing, communications and engagement strategy aimed at supporting all project activities. The current three-year project work-flow is shown below:



Phase 1 Methodology

Phase One Objectives:

Phase one comprises four modules of work, each with its own objectives:

1. **Building Foundations** – the objective being to confirm the main features, issues, stakeholders, information sources and sectors of the Australian seafood industry.
2. **Connecting with People and Organisations** – The objective being to create and roll out a project communications and marketing strategy that will help to raise industry awareness and participation in the project.
3. **Understanding Needs and Value** – The objective being to develop a preliminary understanding of business needs and the potential value offered by a national peak industry body for industry different sectors and businesses.
4. **Market-facing Business Plan** – The objective being to develop a business plan for the design and establishment of national peak industry body that is likely to be valued by industry businesses and organisations.

These activities build on one another and culminate in the projects first major phase of work, which is preparation of a business plan to form a peak body.

The scoping phase included familiarisation with the industry and developing an understanding of the nature and extent of the need for a national peak body. It involved a combination of desktop review and interviews with people and organisations across the industry. Examples of selected documents that were reviewed and the range of consultations conducted are listed below.

In addition, a project website was set up to help communicate what the project is about and to engage and inform all parties with an interest in the future of seafood industry representation (www.unitedseafoodindustries.com.au).

Examples of Documents Reviewed:

- ABARES, 2014, “Australian fisheries and Aquaculture Statistics 2013”
- Australian Farm Institute, 2014, “Opportunities to Improve the Effectiveness of Australian Farmer’s Advocacy Groups – A Comparative Approach”
- Australian Seafood CRC, 2011, “Can they hear me? Modern and innovative strategies to communicate with the seafood industry”, Australian Seafood CRC Project No. 2009/747
- Briggs, J. 2011, “Empowering Industry: Improving Two-way membership Communication in Peak Industry Bodies of the Fishing and Seafood Industry”, FRDC Project 2011/400
- Essence Communications, 2015, “Community Attitudes towards Australian Fisheries Management”, Department of Agriculture
- FRDC, 2014, “2014 FRDC F&A Sector Overview (draft)”
- Intuitive Solutions, 2013, “Community Perceptions of the Sustainability of the Fishing Industry in Australia”
- Intuitive Solutions, 2015, “FRDC Stakeholder Engagement Research”
- MacDonald, B. 2008, “A Review of the Options for the Creation of a National Representative Body for the Seafood Industry”
- Plowman, I. 2011, “Healthy Industry Associations and Succession”, FRDC Project 2011/410

Interviews and Industry Consultations[2]

- Seven State seafood industry associations
- 20+ seafood sector bodies and 15+ seafood businesses across the value chain (including distributors and importers)
- 28+ National Seafood Industry Leadership Program alumni at project breakfast
- Attended and presented at the Australian Seafood Industry National Conference, Seafood Directions 2015
- Interviews/consultations with 70+ industry stakeholders
- Reached 440+ users through the website and 600+ through social media, email and
- Liaison with Department of Agriculture.

A discussion guide was developed and provided to interviewees in advance of meetings with industry stakeholders. A copy is at Attachment B.

[2] For full consultation list see Appendix A

Preliminary Findings and Implications

Industry Characteristics[3,4,5,6]

Seafood is an economically significant, diverse and geographically widespread industry in Australia. The attributes and characteristics of the industry are key factors influencing the development and design of a peak body that is tailored to the industry needs.

The total value of Australian fisheries and aquaculture production, expressed in GVP terms, is around $2.4 billion annually. The full economic and social value would be greater than this figure, as the industry employs over 8,000 people and its geographic spread makes it a vital industry for many regional towns and around Australia.

As Figure 1 below shows, the value of Australian fisheries production is dominated by three states. About 66% of all production value is from Tasmania (29 per cent), South Australia (19 per cent) and Western Australia (18 per cent).

> ***Implication: The economic value of seafood production of the three main producing states needs to be considered in the peak body design. Engagement, support and representation from the industry in these states will be important***

Figure 1: Value of Australian fisheries production, by jurisdiction, 2012–13[ap]

a Location of catch and aquaculture production have been adjusted to exclude southern bluefin tuna caught in the Southern Bluefin Tuna Fishery and introduced into farms in South Australia. Jurisdiction has not been adjusted.
p Preliminary estimates.
Source: ABARES

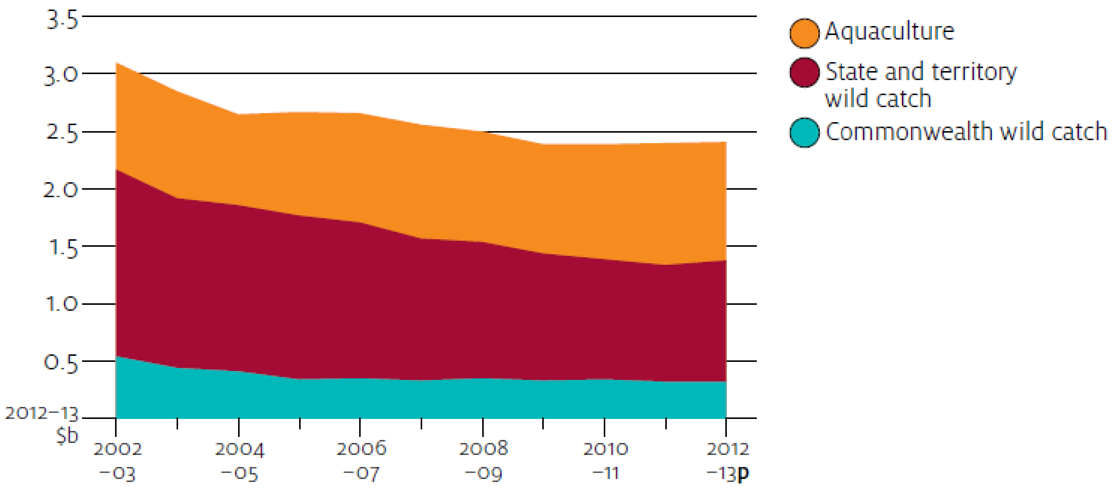
[3] Figures taken from ABARES, 2014, "Australian fisheries and aquaculture statistics 2013"
[4] Tonkin, Brooke, 2015, "Fishing in Australia", *IBISWorld Industry Report A0410*
[5] Department of Agriculture, 2014, "Australian fisheries and aquaculture statistics 2013", Research by ABARES
[6] Tonkin, Brooke, 2015, "Aquaculture in Australia", *IBISWorld Industry Report A0200*

Wild-catch

The wild-catch sector is the largest sector of the industry and contributed 57 per cent of the gross value of Australian fisheries and aquaculture production in 2012–13. Wild-catch production value is approximately $1.4 billion.

The wild catch industry has experienced a decline in total value over the past decade (see Figure 2), with most reduction in state and territory wild catch.

Figure 2: Real value of Australian fisheries production, by sector, 2002–03 to 2012–13[a,p]



a Aquaculture total has been adjusted to exclude southern bluefin tuna caught in the Commonwealth Southern Bluefin Tuna Fishery and introduced into farms in South Australia. This avoids double counting.
p Preliminary estimate.
Source: ABARES

Federal and state governments have enforced strict quotas on harvest as part of the sustainable management of fisheries.

Implication: Resource access issues are a high priority area for a peak body.

On top of resource access issues wild-catch operating costs have risen over the past decade – particularly outlays for vessel maintenance, navigation equipment, fuel and regulatory costs. As such, operators have been forced out of the industry in increasing numbers due to waning profitability. This is forecast to continue through to 2020 with the number of enterprises and employees declining.

Implication: A peak body will need to help cut unnecessary and burdensome red-tape, while working to retain beneficial government policies and programs (eg. diesel rebate, matching government funding for R&D).

Imports and Exports

Over the last eight years aquaculture production has greatly expanded in East Asia, particularly in China, Vietnam and Indonesia. Australia's high dollar and labour costs means that farmed seafood can be imported at relatively low prices. Aquaculture producers are expected to meet the majority of rising domestic and international demand for fish and other seafood.

The total value of Australian imports of fisheries products (edible and non-edible) is increasing annually and was valued at approximately $1.65 billion in 2012-13 (see graph below). In 2012–13 imports accounted for 66 per cent of Australia's total apparent seafood consumption.

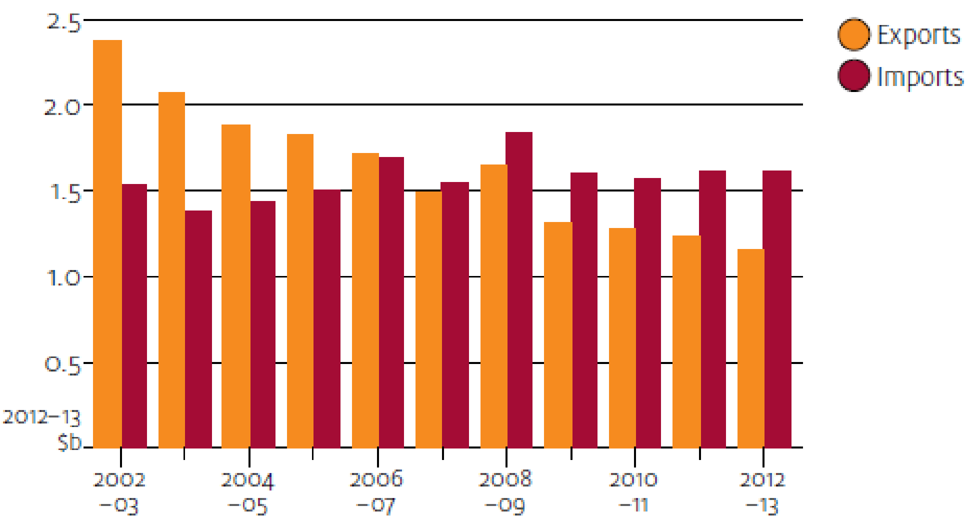
> ***Implication: Imports are a major part of the business system. Large seafood businesses may be operating as producers, importers and/or exporters. A peak body will need to either directly include, or otherwise form strategic relationships with importers, wholesalers and distributors.***

Importantly, export earnings account for approximately 70 per cent of the total value of wild catch (approximately $1 billon). Exports are dominated by three main sectors: rock lobster ($447 million), abalone ($186 million and tuna ($163 million). Strong demand from overseas markets, particularly in Asia, has helped sustain export revenue over the past five years. Figure three shows imports and exports (including non-edible products).

Despite competition with imports for the domestic market, the depreciating Australian dollar and rising incomes among the Asian middle-class should help lift export demand and earnings over the period, providing a growth opportunity for the wild catch industry.

> ***Implication: A peak body will need to be designed to advance the interest of exporters and work with government to resolve market access issues. There are good examples of industry sectors working together on export market access issues (e.g. during the China Australia Free Trade Agreement negotiations).***

Figure 3: Real Value of Australian fisheries exports and imports 2002-03 to 2012-2013



Source: Australian Bureau of Statistics

Aquaculture

The United Nations Food and Agriculture Organisation anticipate that aquaculture production will account for more than half the world's fish production by 2020-21. This highlights the vital role the industry will play in meeting global seafood demand over the next five years.

Aquaculture has become an increasingly significant part of the Australian seafood industry (Figure 2). The gross value of aquaculture production is approximately $1 billion, and accounts for 43 per cent of the gross value of Australian fisheries production. The sector employs roughly 4700 workers and this is forecast to grow annually to $1.3 billion by 2020.

Farmed salmonids are the largest aquaculture species group produced in Australia and, in terms of gross value, the most valuable seafood product in Australia. Salmonids accounted for 48 per cent of the total value of Australian aquaculture production and 21 per cent of the total value of fisheries and aquaculture production. There are a relatively small number of businesses involved in aquaculture production.

Implication: A national peak body should encompass the needs of both the wildcatch and aquaculture sectors. Where national issues are of concern for both sectors, a peak body should foster collaboration.

Post-harvest

The post-harvest sector encompasses processors, wholesalers and point of sale businesses. The industry is dominated by a range of external factors. For example, local and international seafood production has determined the amount of seafood that wholesalers have access to. Increasing disposable incomes and health consciousness have influenced domestic demand for seafood, which translates into rises in per capita seafood consumption.

The domestic production of seafood will depend on domestic wild harvests and aquaculture growth, which in turn are influenced by fishery policies, production costs, and environment, disease and production developments.

The government is expected to continue implementing policies that increase the sustainability of Australian seafood stocks. The policies may reduce seafood catches in the short term, but improve stock levels over the long term. Aquaculture production is forecast to grow strongly over the next five years. At the same time, export opportunities will continue to provide a strong boost to seafood processing revenue.

Implication: The post-harvest sector is a vital part of the industry and a national peak body will need to take a "whole of value chain" approach when engaging with the industry.

Community Perceptions

Both domestic and international consumers are increasingly viewing food quality more broadly than a product's tangible eating quality or dietary attributes. For example, their perceptions encompass the level of sustainability, including associated workplace practices, nutrition and the social and environmental impact of the industry's activities.

Building a 'social licence' to operate with the community is widely recognised as important the seafood industry and its participants. Consumer and community perceptions of the Australian seafood industry are vital for the future prosperity of seafood businesses.

Surveys and research has shown that there is little knowledge in the community of the Australian seafood industry and it's world class credentials.[7,8]

While some improvements have been evident there remains an ongoing challenge to continue to inform, educate and influence community perceptions about the long term sustainability of the fishing industry. Global trends show that sustainability is an important driver of growth across both developed and developing markets and thus fostering informed, positive perceptions of the Australian industry is important.

Implication: A key role for a peak body would be to promote and maintain positive community perceptions about the industry's value and credentials. The role would need to include an ability to anticipate and counter adverse campaigns by organised interest groups.

Common themes and system issues that emerge

The industry consultations and desktop review of various industry reports revealed some common themes that provide useful insights on the opportunities and the complications associated with forming a viable national peak body.

The following are some of the most common themes and issues that emerged, especially in relation to internal characteristics and system issues that will be important to resolve or navigate in designing a peak body (i.e. the following is not a list of the business service needs).

Theme or Issue	Insights
1. What will the peak body do?	This issue was about the organisation's purpose and reason for existing. The intent was to question the value of peak body versus the status quo. Most people spoke about the peak body defending and promoting the industry's interests with governments and the community. They saw it as having a leadership role, setting strategy, direction and priorities on issues that individual businesses or jurisdictional based associations could not do alone, building relationships and alliances. Few saw it as the peak body role to be

[7] Intuitive Solutions, 2013, "Community Perceptions of the Sustainability of the Fishing Industry in Australia"

[8] Essence Communications, 2015, "Community Attitudes towards Australian Fisheries Management", Department of Agriculture

	involved in commercial matters (the domain of businesses) or on ground delivery of services (domain of state or commodity bodies).
2. Will the peak body membership include both aquaculture and wildcatch?	The main variable here is the extent to which people viewed the relationship between the sectors as commercially competitive or complementary. Some wild catch businesses saw the growth in aquaculture as a commercial threat. Another insight related to reputational integrity. Here, aquaculture businesses want to avoid association with negative publicity about wild catch fishing practices and issues (i.e. concern that negative community perceptions about 'fishing' could become perceptions about 'seafood'). On the positive side, most people could cite an example of the benefit of the sectors working together – either on a policy issue or a commercial collaboration (a good example is the *Love Aussie Prawns* campaign).
3. What is the role of State organisations?	This issue had three main dimensions. Firstly, it was the view of many that there is a need to 'move on' from what's perceived as outdated federated peak body structures. There was a sense that the national body should concentrate on national issues and not be 'controlled' by state bodies. The second dimension was about how state government policy and regulatory decisions have a big impact on seafood businesses, so there needs to be a real capacity to advocate industry interests at a state level. The third and related issue was that some industries (e.g. tuna, lobster, and abalone) are strongly export-oriented with specialised value chains. Here, their interests straddle international, national and state issues that impact on industry development.

4. Will the peak body have industry associations or businesses as members?	There are polarised views in this area. Some businesses have a lack of trust in existing organisations, seeing them as either unrepresentative, ineffective or both. They are opposed to such organisations being in a position of influence in a national peak body. Thus, these businesses want the option to join a peak body directly and have their say in a way that is 'unfiltered'. Another view came from businesses that are already part of an effective industry body that they value and trust. Here, people did not want valued services they already receive to be 'diluted' in a broader peak body.
5. Will importers be members of the peak body?	Here, people questioned the alignment of interests between importing businesses and domestic businesses. The case for Country of Origin Labelling was part of this dialogue. Notably, many larger industry businesses are operating across the value chain and variously involved in domestic harvesting/production, processing, importing, exporting, distribution and retail. So the issue is more 'how will the relationship work', rather simply about conflicting interests of 'importers versus domestic' businesses.
6. Will my business have a real say in a peak body?	Two perspectives are behind this issue. Firstly, larger businesses are reluctant to fund most of the costs of a peak body without having the majority of say about the service priorities. They want a say that is proportional to their investment in a peak body and want everyone to pay their way (no free riders). Secondly, smaller businesses question the value of being part of a peak body if their views won't be genuinely heard. Here, there is a sense of 'what is the point - larger businesses will run the agenda anyway'. Both views are based on frustrations with how current and past industry bodies operated.

7. Does this mean there will be yet another seafood industry body?	There are many industry organisations across the seafood industry. Businesses pointed to the contrast between consolidation of the private sector and fragmentation by industry bodies. There was a sense of needing fewer better industry bodies that worked in alliance. Businesses don't want to pay for membership of more organisations. They want more value for the money they already invest.
8. What would be the relationship with the recreational sector?	Wild catch businesses are the main group who questioned the relationship with the recreational sector. Loss of resource access for commercial fishers due to the activities of the recreational lobby is a common concern. There is a general sense that the peak body should have a relationship with recreational fishers, but not include them as members of the commercial seafood peak body.
9. Should there be a statutory levy?	Most people interviewed were wary of moving to a statutory levy. Common concerns were that it would be costly and time-consuming to pursue, with a low likelihood of success. Further, many perceived that funding via government comes with 'strings attached' and risks stifling the ability of the industry to lobby governments without risk to revenue. The competing view is based on real concerns about free riders. 'If it's not mandatory, then a few are paying for the benefit of many'.

In summary, people tended to speak about issues relating to what the purpose of the organisation would be, which sectors would be included in membership (who it would represent or not), what the implications might be for existing industry bodies, the extent to which their sector/business would have influence/receive value and how it would be funded.

Implication: These themes and system issues are not new and have been well-documented in various studies over the past decade. There is no need for more analysis. What is needed is a different process of change and industry leadership to do something about them.

Lessons from history with seafood industry peak bodies

The seafood industry in Australia has struggled to form and sustain its industry representation institutions. The MacArthur Agribusiness review of the Australian Seafood Industry Council (ASIC) membership and structure in May 2002 highlighted many of the issues that still exist today. It cited comments by a 1997 House of Representatives Standing Committee that 'it is strikingly apparent that there is a lack of seafood industry leadership at the national level' and it further believed that 'the fishing industry has not developed a national profile because of institutional failure to adequately invest in a national body to represent the entire industry at a national level'. At the time, ASICs annual revenue was only $250,000.

ASIC subsequently went into administration in 2002 and since then several independent studies have been done to identify structural and funding options. None have gained traction, though the quality and findings of these reports are not at issue.

The National Seafood Industry Alliance (NSIA) was formed in 2008 and incorporated in 2009 to provide a mechanism for responding to national issues. In effect, the NSIA has provided an interim mechanism that had some successes operating as a collaboration of State and National bodies to make the best of available resources and (where possible) have a united voice on common issues.

The limited revenue for NSIA means that the organisation lacks the management capability required to advance issues on behalf of the industry. Instead, it has tended to react as issues emerge, with members taking on NSIA's work as well as managing their own organisations.

Perhaps the most significant lessons from history are:

1. Stop pursuing strategies and activities that are proven to not work or are responding to the wrong problem
    a. There is no need to continue investing in more studies about structural options for a national seafood body. They will continue to confirm what is already known
        i. The structure and the funding model are both technical issues that can and will need to be resolved.
    b. The change process is not simply 'develop a rational model supported by large/influential businesses/organisations and others will buy in'
        i. Such thinking might work within a large business where there is authority to force implementation, but change cannot be 'engineered'[9] in the same way across multiple organisations and businesses.
        ii. A logical business case for change is important, but across an industry of many independent businesses it requires an active process to get buy-in and build support for change and innovation.
2. Start concentrating more on industry leadership of a change process
    a. Create a vision for the future, establish a guiding coalition of leaders (composed of a diversity of people from different sectors, regions, size of enterprise, age, gender

[9] https://hbr.org/2013/10/stop-trying-to-engineer-success/

and so on), leverage industry networks and communications that engage people in a strategic way and help raise wide awareness about the need and urgency for change, work through a structured change process

i. The seafood industry is a complex industry and it will take a strategic, systems approach to achieve change (which is the real problem).

b. Work directly with seafood businesses to create a groundswell of support.

i. When the larger businesses in the biggest seafood industries (by value) support the formation of a national peak body, it permits the start (not the end) of a widespread change process across the majority of businesses.

Implication: Establishing a new peak body is a complex change process that must be led by the commercial businesses with support from expert advisers (not vice versa)

Industry demand for a national body

Establishing the need for a peak body has involved a structured approach to identify the most important areas of service demand for seafood businesses. This approach helps to inform value proposition/s that will be meaningful for each of the major sectors in the seafood industry.

Does the industry believe a national peak body is needed?

If so, how urgent is the need to establish the peak body?

What is most valued by different major industry stakeholder groups?

What common areas of unmet value could be provided by a peak body?

What are the implications for the peak body vision, business model and funding?

The need for a national peak body

One of the first tasks has been to establish the extent to which there is a widely held view amongst seafood businesses and industry bodies that a national peak body is needed. The project intent is to confirm and respond to the real and perceived need for a national body and is not seeking to impose a peak body on the industry.

Meetings and interviews with a variety of industry stakeholders across Australia confirmed that there is a widely held view and a perceived need for a national peak body.

Rather than 'if' there should be a peak body, most people wanted to discuss 'how' it might be structured, what services it will deliver (or not), what hurdles need to be overcome and how it would be funded. The implications are that many people are ready to act and that there is a sense of urgency to establish a national peak body.

The finding that there is a need for a peak body is consistent with other studies and research conducted in recent years. However, while other studies in the past decade have identified the need for a national peak body, it has not eventuated.

Further, although the formation of the NSIA industry has partially responded to the need for peak body, it is not funded or positioned to pursue a strategic agenda for the industry.

> ***Implication: Past failings to establish and sustain a viable and influential peak body means that the task should not be underestimated.***

Success will require a measured approach that engages multiple stakeholders in the development of a preferred business model and enlists their support for implementation. It will require to a compelling value proposition that responds to the needs of each major industry sector.

Sense of urgency to establish a peak body

Consultations indicated that many people in the industry believe it is a priority to form an influential national peak body that can defend and promote the industry's interests in a cohesive way:

> *"we are crying out for a strong peak body"*
>
> *"working at cross purposes is very damaging"*
>
> *"we see real value in forming a peak body – what do you need from us?"*
>
> *"what is on the horizon? We need a strategic approach [as an industry]"*

The key implication is that the timing is right to work with the industry and establish a peak body. The initial feedback is positive, and the sense of urgency presents a challenge to respond by accelerating the project.

Value Gap Analysis: Common needs and value sought

The commercial seafood industry has a variety of influential parties that are part of the wider 'system' that businesses operate in. A distinctive role of any peak body is in strategic relationship management, so awareness of the context and what other stakeholder's value is important. For example:

- Supermarkets
- Food service industry
- Government policy makers
- Government regulators
- Researchers
- Environmental NGO's
- Fisheries R&D Corporation

- Selected industry associations (e.g. National Farmers Federation)
- Recreational fishing organisations
- And so on.

The ‘richness and reach’ of relationships that the peak body develops with these different stakeholders will depend on the needs and strategic priorities of members. At a high level, the major groups could include:

1. Wild catch export
2. Wild catch domestic
3. Aquaculture
4. Post-harvest

There are obviously interrelations between some of these groups, but also some different areas of service need as well. For the purpose of examining value needs, this grouping provides a useful starting point.

Wild catch export

This group includes important export industries such as abalone, lobster and tuna, as well as many commonwealth fisheries, northern prawn fisheries and so on. The key differentiator is that the success of the businesses involved is strongly influenced by revenues from exports.

> *"we need to be involved in negotiations such as Free Trade Agreements to secure market access for our products"*

> *"Australia has some of the best fisheries management in the world, but 'overfishing' is getting a run anyway"*

Need/Value sought	Value Gap	What is happening now
Investment confidence	• Agreed national strategy with priorities for sustainable industry growth	• Variety of sectoral, regional or state based strategies and plans
Maintain and defend resource access	• Collect and promote objective evidence that informs national/state policy makers and decision makers. • Strategic approach to identify, prioritise and manage emerging threats to resource access • Relationships, strategy and advocacy to balance activities of competing interest groups • National relationships and collaborations with other sectors, NGO's, major customers/retailers	• Declining access in Commonwealth and State fisheries (marine parks, coastal fishing bans) • Ad hoc or reactive approach to resource access threats • Resource access decisions influenced by political factors ahead of scientific evidence • Damage to industry reputation in one sector affects reputation of all
Growing profitable markets for wild caught seafood	• Strategic approach to defend and improve export market access, especially for markets willing to pay a premium • Strong brand positioning with customers for premium quality Australian wild caught seafood • Promote and improve the integrity of systems that demonstrate food safety, sustainability, ethical production practices.	• Ad hoc involvement in export market access negotiations • Risk of Australian seafood losing out in negotiation trade-offs • Competition from other exporting countries • Conservative and risk averse management means some fisheries could be under-utilised

Reduce operating costs	• Sustained national effort to maintain diesel fuel rebate • Visibility on the costs and trends with red and green tape • Objective scrutiny of value for money and performance by government fee for service	• Diesel fuel rebate available, but regularly scrutinised by government • Compliance burden with red and green tape • Fee for service by government policy makers and regulators
Professional reputation of wild catch businesses with community and customers	• Strategic approach to promote the world class credentials and value of wild catch fishery businesses • National relationships and collaborations with other sectors, NGO's, major customers/retailers	• Industry reputation and profile with community is weak and vulnerable to campaigns – highly export oriented industries could have low awareness and connections with community • Ad hoc sectoral, state or regional communications • Customer and community perceptions of the industry are shaped by competing interest groups

Wild catch domestic

These are the businesses that supply local processors and distributors with a wide variety of locally wild caught fish and seafood. The main differentiator for these businesses is that most of their revenue is generated from sales to meet demand from domestic consumers.

Need/Value sought	Value Gap	What is happening now
Investment confidence	• Agreed national strategy with priorities for sustainable industry growth	• Variety of sectoral, regional or state based strategies and plans
Maintain and defend resource access	• Collect and promote objective evidence that informs national/state policy makers and decision makers. • Strategic approach to identify and manage emerging threats to resource access	• Declining access in Commonwealth and State fisheries (marine parks, coastal fishing bans) • Ad hoc or reactive approach to resource access threats • Resource access decisions influenced by political

	• Strategy and advocacy to balance activities of competing interest groups • National relationships and collaborations with other sectors, NGO's, major customers/retailers	factors ahead of scientific evidence
Growing profitable markets for wild caught seafood	• Brand positioning with customers for premium quality Australian wild caught seafood • Integrity of systems to demonstrate food safety, sustainability, ethical production practices.	• Consumer uncertainty about wild/farmed/local/imported • Some fisheries under-utilised
Reduce operating costs	• Sustained national effort to maintain diesel fuel rebate • Visibility on the costs and trends with red and green tape • Scrutiny of fee for service performance by governments	• Diesel fuel rebate available, but regularly scrutinised by government • Compliance burden with red and green tape • Fee for service by government policy makers and regulators
Professional reputation of wild catch businesses with community and customers	• Strategic approach to promote the world class credentials and value of wild catch fishery businesses • National relationships and collaborations with other sectors, NGO's, major customers/retailers	• Industry reputation and profile with community is weak and vulnerable to campaigns • Ad hoc sectoral, state or regional communications • Customer and community perceptions of the industry are shaped by competing interest groups

Aquaculture

These are the businesses whose farms are meeting a growing portion of consumer demand. They include industries such as salmonid, barramundi, prawn and oyster. The main differentiator for these businesses is that most of their revenue is generated from sales to meet demand from domestic consumers.

Need/Value sought	Value Gap	What is happening now
Investment confidence	• Agreed national strategy with priorities for sustainable aquaculture industry growth (industry led)	• Variety of sectoral, regional or state based strategies and plans • Government-led development of national aquaculture strategy • Development decisions slow or prevent expansion of Australian aquaculture businesses.
Biosecurity	• Collect and promote objective evidence that informs national/state policy makers and decision makers on the value of the industry • Strategic approach to identify, prioritise and mitigate biosecurity threats in collaboration with governments	• High biosecurity status of Australian aquaculture is part of the premium quality proposition and the basis of efficient, competitive production • Wind back of government capacity to monitor and prevent disease/pest incursion
Growing profitable markets for products	• Brand positioning with customers for premium quality Australian aquaculture produce • Integrity of systems to demonstrate food safety and sustainability.	• Consumer uncertainty about wild/farmed/local/imported and credentials of Australian aquaculture • Consumers increasingly place a value on provenance. While produce origin is visible in retail outlets, it is not the case in most food service outlets.
Reduce operating costs	• Sustained national effort to maintain diesel fuel rebate • Timely access to aquavet chemicals for use by business • R&D for productivity and efficiency • Visibility on costs, trends with red and green tape	• Diesel fuel rebate available, but regularly scrutinised by government • Issues with timely access to minor use permits • High feed costs • Compliance burden with red and green tape

Professional reputation with community and customers	• Strategic approach to promote the world class credentials and value of aquaculture businesses • National relationships and collaborations with other sectors, NGO's, major customers/retailers	• Industry reputation and profile with community is variable • Ad hoc company, sectoral, state or regional communications • Customer and community perceptions of the industry are shaped by competing interests

Post-Harvest businesses

These are the businesses that are involved in processing and distributing products to meet consumer demand in Australia and overseas. It includes the wholesalers, distributors, processors, exporters, importers and retailers.

Need/Value sought	Value Gap	What is happening now
Access to a reliable supply of seafood products to match consumer demand	• Inform national/state policy makers and decision makers about what the industry is doing and achieving • Collaborations with harvest and aquaculture sectors to improve local supply	• Declining access to wild caught Australian produce due to State and Commonwealth fisheries decisions (marine parks, coastal fishing bans) • Development decisions slow or prevent expansion of Australian aquaculture businesses, which limits supply of Australian produce. • A high proportion of supply is sourced from overseas
Growing profitable markets for seafood	• Strategic approach to defend and improve export market access • Brand positioning with customers for premium quality Australian wild caught seafood • Integrity of systems to demonstrate food safety and sustainable production	• Ad hoc involvement in export market access negotiations • Consumer uncertainty about wild/farmed/local/imported • Variable evidence of sustainability for produce
Reduce costs, increase	• Visibility on the costs and trends with red and	• Compliance burden with red and green tape

throughput	green tape	
Professional reputation of Australian seafood businesses with community and customers	• Strategic approach to promote the world class credentials and value of Australian seafood businesses	• Industry reputation and profile with community is weak • Ad hoc sectoral, state or regional communications • Customer and community perceptions of the industry are shaped by competing interest groups

Implications for a national seafood industry peak body

The above analysis identifies some common value gaps and unmet national service needs across wild catch (export and domestic), aquaculture and post-harvest businesses. These are expressed as persistent problems that create direct or indirect costs for industry businesses collectively and individually.

Four service areas stand out as representing distinct and significant value across the wider seafood industry and are most likely to respond to the demand from seafood businesses:

1. **Strengthening public perceptions** of the Australian seafood industry reputation as a professional, world class industry producing safe healthy food
    a. Supported by national relationships and collaborations with other sectors, NGO's, major customers/retailers
2. **Government relations and public policy advocacy**.
    a. Resource access, diesel fuel rebate, biosecurity, food safety, regulatory reforms
3. **Industry strategy and growth**
    a. Ensuring industry resources and services are allocated in areas that will create the most benefit for seafood businesses.
        i. Without duplicating existing investment prioritisation mechanisms that are performing well
4. **Strategic issue management.**
    a. Monitor and timely response to issues that affect multiple sectors/states.

High level attributes for a national peak body

There is no ideal design for an industry body. There are always trade-offs, not only today but over time. For example, the arrangements that suit the industry today can differ from what is needed in a few years as the business operating environment changes. It means an ability to readily adapt and evolve the peak body is essential. The organisational arrangements should provide:

- a focus on a single national strategic direction that links all industry sectors;
- effective input into industry R&D and marketing and promotion programs
    - without duplicating existing industry R&D prioritisation arrangements that are functioning efficiently and effectively
- a seamless relationship between policy, R&D and marketing services;
- high industry ownership and low involvement of government;
- high accountability to members;
- flexibility in the use of funds;
- adaptability; and responsiveness to changing industry service needs.

In summary, the industry requires a nimble, market-facing organisation that can use its resources (people, money, technology and information) to provide valued services for seafood businesses in a rapidly changing environment. There are a range of options in the form that such an entity can take, starting with a decision on the scope of membership (what is included or not).

Strategic decision on the level of integration of primary membership

One of the first strategic decisions for the industry is the scope of membership for the national peak body. There are a variety of existing industry bodies across wild catch, aquaculture and post-harvest sectors. So the strategic question is:

Does the industry want to simply add another body to the current mix?

Such an approach would be a type of **Sectoral Alliance**, which is analogous to the existing National Seafood Industry Alliance model. It would have a new peak body with membership of existing bodies as members and an MOU defining respective roles and responsibilities.

Feedback from consultations was that there is low appetite across industry businesses for simply adding another body (and another membership fee) to what is already a crowded market in a small industry.

The situation is further complicated by a wide range of capacity, industry value and level of membership authority across existing industry bodies. So the alliance model needs to accommodate bodies with low membership levels and income, along with others that are strong and authoritative.

Seafood businesses that are not part of existing bodies are not catered for under this sectoral alliance model. The evidence from the NSIA experience is that the model is a not viable for the new peak body.

Simply adding another peak body is not recommended.

If not, does the industry want to add a new body with membership encompassing selected existing bodies that would be reduced in their scope of services or phased out altogether as the new body becomes established?

Consultations suggest more appetite from industry businesses for a peak body where there is also some consolidation of existing industry bodies. Their thinking reflects established consolidation trends across the private sector and an expectation that the same trend should apply with industry bodies. There are also varying levels of satisfaction with the performance of existing bodies, at least in relation to national issues.

However, existing bodies have their own governance arrangements and ultimately any decision to reduce scope or phase out an existing body are a matter for their leadership and members. A critical consideration for implementing such changes is that seafood businesses will want a smooth transition that minimises disruption of valued services.

If so, what scope of integration would the national peak body encompass?

To what extent would the new peak body have members from wild catch, aquaculture, post-harvest and commonwealth fisheries? And would the membership of the new peak body be businesses in direct membership, or industry bodies in membership, or both?

Consultations suggested that the most important thing is to bring together those parties where there is a clear strategic alignment of interests and service needs.

It suggests the strongest alignment is between wild catch, Commonwealth fisheries and aquaculture, with an alliance or formal memorandum of understanding with relevant post-harvest bodies.

Options for sustainable funding mechanism

Option	Example	Pros	Cons
Statutory levy	• Percentage of value of production	• Sustainable, reliable revenue stream • Equitable, with all contributing	• hard to establish (costly and lengthy process with uncertain outcome) • red tape, compliance and reporting once established
Voluntary membership fees	• Flat rate • Tiered fee • Fee directly linked to scale of enterprise	• Strong indicator of industry support and value of services • High flexibility in use of funds, including political advocacy	• Larger members subsidise baseline services • Free riders
Service fees	• Project management	• Visibility with	• Requires internal

	fees for national industry services (eg. hosting Conferences such has Seafood Directions)	members and others • Reduces dependency on member fees • Clear market signal on service value	capacity and/or or ability to manage outsourced suppliers • Could compete with commercial providers
Sponsorship	• Companies providing products or services to businesses may sponsor the peak body or events it convenes	• Strengthens networks and commercial relationships • Reduces dependency on member fees	• Many industry bodies are seeking sponsorships from the same firms
Crowd funding for campaigns	• Crowd funding though online campaigns for specific projects	• Accesses both industry and wider community investment • Large amounts of funds can be raised quickly • Flexibility on 'how' funds used	• Project or campaign oriented and not suited to meeting ongoing or 'core' management costs • Funds should only be used for the purpose raised (i.e. not flexible to re-allocate for a different purpose
Donations	• Similar to crowdfunding	• Accesses both industry and wider community funds	• Unpredictable

Funding for a core team would mostly come from voluntary membership fees, services and sponsorship, with separate fund raising for campaigns.

There may be a case for statutory levy for communication services to promote the industry's reputation and value to the community, as voluntary funding brings the risk market of market failure and free riders.

Business Plan Overview

The first phase of the project provided valuable insights to help refine the design of the next phases. The main messages are:

- There is a case for pursuing the establishment of a peak body
- It will be important to accelerate the process, but do so in a measured way
- Leadership of the change process now needs to extend beyond the NSIA membership
    - With active and visible commercial leadership from industry businesses being a critical success factor
- Much needs to be done to raise awareness and provide opportunities for consideration of options and participation by all industry businesses
- There are some strategic issues that must be considered before moving to formulate business model options and decide on the preferred model.

The findings of the scoping phase are a valuable input to the business plan, which involves a series of important questions:

1. What is the problem? (the opportunity)
2. How do we solve it? (the solution)
3. Who has the problem and how much 'pain' is it causing? (the market)
4. How do we connect with the people with the problem? (operational plan)

The following sections use information from the scoping phase to help answer these questions.

The opportunity

The industry service opportunity or main 'problem' is potentially the most important part of the business plan. If potential investors (e.g. businesses and industry bodies) can't recognise the problem as important to them, then the rest of the plan becomes pointless.

Across the industry there is a mixture of ongoing and emergent problems with national implications, as well as examples where the problems are acute (e.g. net bans) or frustrating (e.g. red tape) for different groups.

> ***"It is like death by a thousand cuts…like we are in a downward spiral."***

Established and persistent problems are creating direct or indirect costs for industry businesses collectively and individually. The industry has been ineffective and inefficient in responding to these external issues, resulting in:

1. **Fragile or poor public perceptions** of the Australian seafood industry reputation as a professional and valuable industry producing safe healthy food, expressed as:

   a. Thin levels of public support (social license) and high vulnerability to campaigns by competing interests on public policy decisions
   b. Uninformed or unfounded negative perceptions about what the industry is doing and achieving (e.g. regarding stewardship of natural resources)
2. **Uncoordinated, weak and inconsistent Government relations and public policy advocacy**, expressed as:
   a. a long term trend of declining resource access for wild catch businesses across all states and Commonwealth fisheries
   b. high vulnerability to loss of beneficial policies such as the diesel fuel rebate, matching funding for R&D
   c. Accumulated red and green tape that imposes unnecessary costs, slows or prevents business and industry development
3. **Lack of national strategy for industry development and growth**, expressed as:
   a. Lack of a few agreed priorities for action means spreading of efforts thinly across many activities for industry policy, R&D and marketing services
   b. High risk of inefficiencies and duplication of efforts
   c. Reduced influence by the industry in wider government strategies for industry development
   d. Vulnerability of low value/inshore fisheries to political decision making
4. **Poor strategic issue management** to monitor, prepare and respond to trends and disruptive changes that impact on businesses and the industry's reputation with its customers and the community, expressed as:
   a. Reactive and uncoordinated responses (e.g. the super trawler issue, net bans)
   b. Inability and/or long delays in developing and advocating an informed and agreed industry position
   c. Fragmentation rather than collaborations, alliances and relationships with parties such as other influential industry bodies, importers and NGO's.

Over the past decade or more, these problems have been well-documented and the subject of multiple studies and industry discussions - without achieving meaningful progress.

Further, businesses have sought to address the problems through a variety of national, state and industry-specific industry services bodies, again with limited success. At the same time, costs to the industry have been compounding annually, while business service demand is unsatisfied.

Many business leaders across different sizes of industry and enterprise recognise the need for change. The opportunity now is to strategically engage with commercial businesses and define a peak body business model solution that they are willing to invest in.

The solution

The business case for establishing a peak body is compelling. There is a clear need for a unified strategy and a viable business model that the seafood sectors are willing to invest in. The peak body design can leverage the experience and learning of other industries, and tailor the organisation so that it matches the needs and characteristics of the seafood industry.

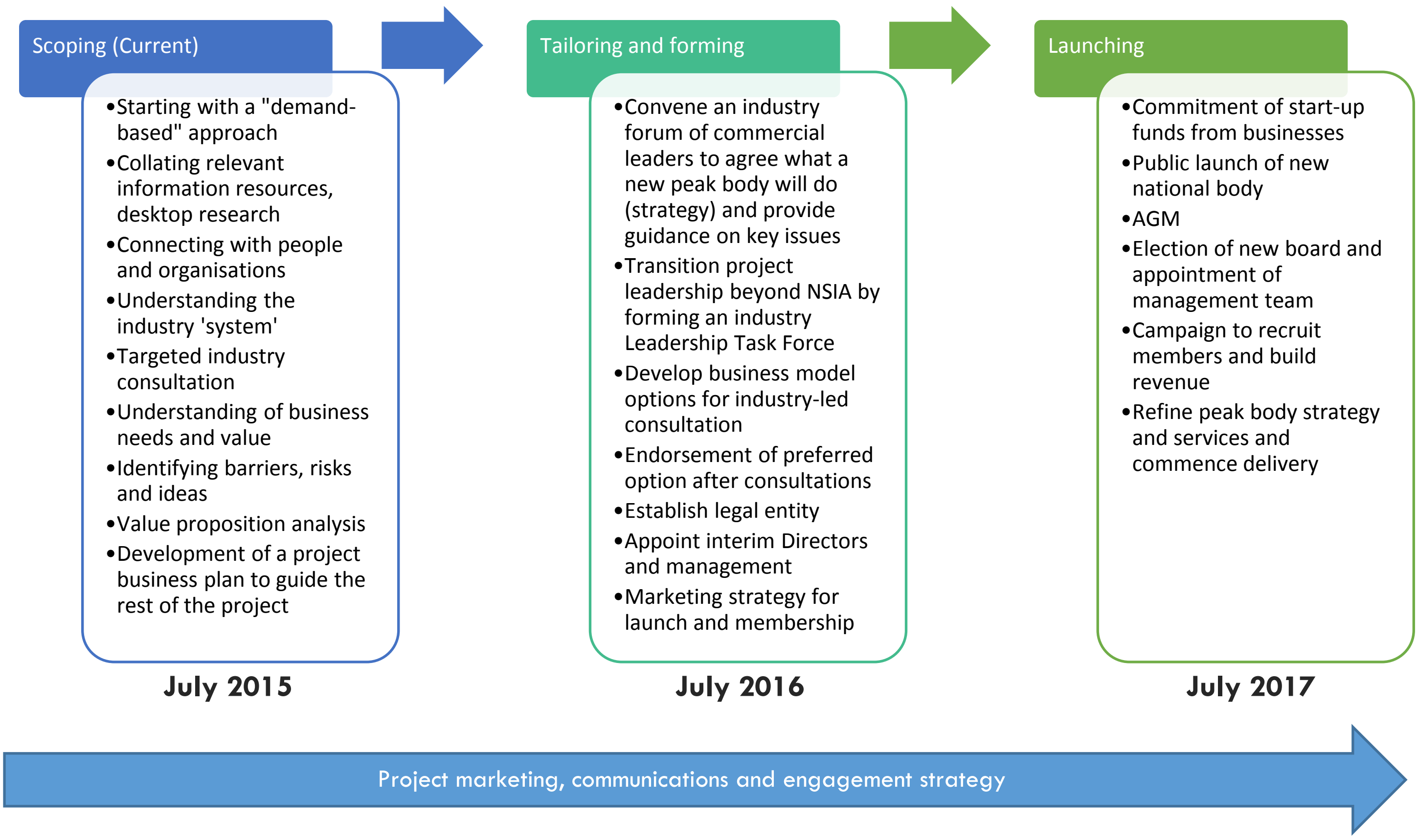
The market

A variety of organisations are expected to value the establishment of an influential peak body. The most important groups are the industry businesses and industry bodies that encompass wild catch domestic, wild catch export, aquaculture and post-harvest. Within these, the largest numbers of businesses and industry bodies are in the wild catch sector, which makes engagement more complicated. The aquaculture and post-harvest sectors tend to have fewer larger businesses, which makes for greater ease of engagement.

Across all sectors, the larger businesses are a critical *starting point*. These have the most to lose from a continuation of the status quo and (potentially) the most to gain from the formation of an effective national peak body. Other seafood production businesses and a diversity of firms providing services and goods to seafood businesses have an interest in ensuring industry prosperity. Many organisations are potential beneficiaries of an effective peak body.

Revised project plan and activities

In response to industry feedback to accelerate the project, it can be achieved with integration of the tailoring and forming phases. A possible work-flow is outlined in the graphic below.



Combining the 'Tailoring and Forming' phases would respond to industry expectations that the project move more quickly. However, moving the project faster is not simply about activities and tasks. The first and most critical step is to accelerate the transition to clear and active commercial leadership by the industry in implementing the remainder of the project.

The first mechanism for shifting towards greater industry ownership will be to convene an industry forum of influential commercial leaders and representatives in late March 2016. The main objectives of the forum will be to:

- confirm a strategy for the peak body,
- consider the main strategic issues requiring further consultation and
- formation of a Seafood Industry Leadership Task Force to lead the next stage of change process.

The Leadership Task Force would be chaired by a business leader and be established with a governance framework to clarify roles and responsibilities, especially in relation to the NSIA and the project manager.

Its main role will be to work with the project manager to develop a business model options paper for wider industry consultation and feedback. Three business models options will be defined and incorporated into the options paper, showing the pros and cons of each. It will also include other issues that require wider consultations, such as:

- the board composition,
- appointment of directors,
- appointment of a chair (and whether they should be independent), and
- the proposed membership categories, rights and fees.

The work of the Task Force will help inform the case for a decision to accelerate the final phases of the project and complete it by June 2017, rather than by June 2018.

The feedback from consultations and a recommended model for implementation will be provided to the NSIA and the participants of the industry forum for ratification. The process is show in the graphic below.

The leadership task force would be supported by the Project Manager who will report progress to NSIA on a regular basis.

Industry Forum March 2016

- Commercial leaders guide peak body strategy
- Strategic issue consultation
- Endorse change process
- Form project leadership task force

Leadership Task force

- Governance framework for roles and responsibilities
- Project Manager support
- Business model options paper, industry consultation
- Recommended business model
- Case for accelerating the project completion

Implementation

- Model endorsed by industry forum participants
- Principles for consititution agreed
- Legal entity formed with foundation directors
- Transition from task force to peak body and launch

The tailoring and forming phases will involve increased industry communication and engagement to raise awareness and enlist support from seafood businesses for a new peak body.

Key issues for consultation

Commercial guidance is needed from industry business on some significant strategic issues before options for peak body business models are finalised. Guidance on these issues at the industry leader forum in March/April 2016 will be critical to inform the development of business model options that are likely to meet commercial expectations. The main issues were documented in the findings of phase one and are listed in the table below.

Issue	Consideration
What will the peak body do?	Structure follows strategy and the peak body will need early guidance from potential members on its purpose and its strategy and main priorities as an organisation. A strong strategic framework with clear targets and outcomes will provide the basis for good decision-making by the board and management. Once established, the peak body would have an important role in developing an industry-wide strategy, but this is a separate task.
Scope of membership for the peak body	The peak body needs to start with its ideal 'core' membership. Over time, and with good performance and the support of members, it

	may seek to broaden membership. Important questions at the start will be whether the founding membership includes: • Both wild catch and aquaculture? • Industry bodies and/or businesses? • Post-harvest businesses such as importers and retailers?
What will be the role of state bodies?	Will the peak body be a conventional federated structure? If not, what would the state bodies do and not do?
Do seafood businesses want fewer industry bodies that offer more value?	If a new peak body is formed, to what extent do industry businesses want to see consolidation of, or a changed scope for existing bodies? What principles or priorities should be applied?
Statutory or voluntary funding?	The first phase of the project found a general preference for voluntary over statutory funding options. Are there any service areas where statutory funding could be justified (e.g. communications) or is it off the table?

Governance, Legal and Administrative Requirements

The project is now reaching a tipping point, where the leadership and governance arrangements will evolve to the next stage:

- An industry forum in March 2016 to broaden the leadership beyond NSIA
- Formation of a Seafood Industry Leadership Task Force to provide direction and be the visible face developing the vision, strategy and the process of change to create the new national body
- A transition period, where a new legal entity for the national body is created and the constitution is being developed
- Launch and scale-up of the new national body, along with wind-up of the Task Force

Potential governance implications for a new peak body

Feature/Issue	Comment
Type of legal entity	A company limited by guarantee is a common choice of modern Australian peak bodies
Board of Directors	A strategic board of 7-9 directors is good practice. Any smaller and it is not seen as representative. Any larger and it becomes unwieldy with the risk of sub-groups. A diverse industry such as the seafood industry would warrant a board of nine.

Chair	One of the most common failings of representative boards is the lack of an effective independent chair[10]
Management Team	Modern peak bodies tend to be flexible and have small and highly skilled management team of 3-5 people. These typically include a professional Chief Executive, a policy manager, a communications or media/member officer and administrative support. Other capabilities are outsourced to specialists as required, rather than internalising as an overhead.
Business Models	Conventional 'full service' business models are generally not working well. There are a number of alternative models with potential application. For example, the 'freemium' business model that has flourished in the digital economy allows entry at low or no cost, but requires more fees for 'premium' services. Digital advocacy and online sourcing of funds are rapidly growing trends to leverage.
Funding Required	Industry feedback and experience of peak bodies in other industries suggest that an annual income of at least $0.75m would be needed for high performance core team.

Operationising the next phases

A series of supporting plans have been prepared to enable effective implementation of the next phases of the project. These include:

- Monitoring and Evaluation Framework
- Communications plan
- Risk Plan
- Updated budget

These plans will be implemented and updated by the Project Manager, with oversight by the National Seafood Industry Alliance.

[10] Ralph and Cameron. The challenges of a representative board. Company Director Journal. June 2006. P14-15

Appendix A: Consultation to date

The following is a sample of the people who have been consulted between July and November 2015.

Organisation	Individuals
Department of Agriculture	Paul Pak Poy, Tim Bull, Samantha Matthews, Thomas Krijnen, Francesca Ballard, Cadie Artuso, Lucie Blom
Fisheries Research & Development Corporation	John Wilson, Peter Horvat, Crispian Ashby
Australian Commercial Fishing Federation Inc.	Jason Hoyland, Melanie Young
Seafood Industry Victoria	Jonathon Davey, Tanya King, Michelle Hansen, Grant Leeworthy
Commonwealth Fisheries Association	Renee Vajtauer
Victorian Rock Lobster Association	Markus Nolle
Western Australia Fishing Industry Council	Arno Verboon, John Harrison, Alex Ogg
Queensland Seafood Industry Association	Eric Perez, Kevin Reibel
TSIC	Julian Harrington
Wildcatch Fisheries SA	Franca Romeo, Neil MacDonald
South Australian Blue Crab Pot Fishers Association	Bart Butson, Dennis Holder
Marine Fishers Association	Michael Fooks
Abalone Industry Association of SA Inc	Michael Coates
Abalone Council Australia	Jonas Woolford
Australian Southern Bluefin Tuna Industry Association	Brian Jeffriess, Claire Webber
Cleanseas	Craig Foster
Raptis	Tony Hurley
SeaFarms Group	Dallas Donovan
Aquaculture Council of West Australia	Tina Thorne
Western Rock Lobster Council	John McMath
Shark Bay Prawn Trawler Operators' Association	Phil Bruce
Ridley	Robert Harvey
National Aquaculture Council	Pheroze Jungalwalla
Tasmanian Seafood Industry Council	Julian Harrington
Tasmanian Rock Lobster Fisherman's Association	John Sansom
Oysters Tasmania	Adam Saddler
Huon	Philip Wiese, Jamila Fontana
Austral Fisheries	David Carter, Martin Exel
Tasmanian Salmonoid Growers Association	Adam Main
Skretting	Dr Rhys Hauler, James Rose
Tassal	Linda Sams
Australian Barramundi Farmers Association	Chris Calogeras
Women's Industry Network Seafood Community	Leonie Noble

Kailis Bros	George Kailis
Seafood Importers Association of Australasia Inc	Norm Grant
Sydney Fish Market	Bryan Skepper
Oysters Australia	Rachel King
Fishermans Portal	Robert Pender
SEAFOOD DIRECTIONS 2015	Audience approximately 200
New Zealand Seafood	Tim Pankhurst
National Seafood Industry Leadership Program (NSILP) Alumni Breakfast	29 NSILP Alumni
Northern Territory Seafood Council	Rob Fish, Katherine Winchester
FRDC Board	Harry Woods, Patrick Hone, Renata Brooks, Colin Buxton, John Harrison, Lesley McLeod, Daryl McPhee, John Susman

In addition, social media accounts and dedicated website were established at www.unitedseafoodindustries.com.au with strong and increasing engagement. In the first three months from launching the website, engagement went from zero to:

- 3825 page views
- 507 twitter followers
- 110 people signed up for mail

The project website provides a strong foundation to scale up industry engagement during the next phase.

Appendix B: Discussion points for industry meetings

Key discussion points for industry meetings

It is important to establish early in the project 'what' a national body would do that industry businesses can't do alone and would create tangible business value. Some useful discussion points that help us understand this question are:

1. What are the 3-5 most important trends and issues that are now affecting or threatening the prosperity of seafood businesses?
    a. Provide examples where opportunities are limited or costs added?
    b. How significant are these constraints and costs (trivial or material)?
    c. Are they ongoing issues or emerging issues?
    d. Is the impact getting worse or expected to get worse if nothing is done?
    e. How widespread are these issues – are they affecting a few or many seafood businesses?
    f. Is it harvest or post-harvest businesses that are most affected? Or is it whole seafood value chains or the entire industry?
2. In what ways are the current industry representation arrangements helping or hindering an effective response to these issues and trends?
    a. What is working well and what needs to stop happening?
    b. What are the benefits of not changing current arrangements?
3. What essential capabilities would a high performing national peak body need?
    a. What are the benefits of creating such an influential national body?
    b. What are the main hurdles and risks for setting up this national peak body?