

INQUIRY INTO COMMERCIAL FISHING IN NEW SOUTH WALES

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Executive summary

The NSW commercial fishing industry is at a crossroads. It has been operating under a framework that ultimately reduces the profitability and viability of the commercial fishing sector within NSW. For more than 20 years there has been a recognition that structural adjustment of the fishing industry would be necessary to deal with issues of resource sustainability and sharing, overcapitalisation, and economic development. There have been numerous inquiries at state and national levels that have highlighted the need to adjust fishing effort, management and administration and the looming risks of failing to do so.

There is no argument about the significant benefits to the people of NSW from a strong, sustainable and viable commercial fishing sector. There is no dispute that local economies are stronger because of the direct and compound benefits of fresh locally caught seafood. A viable industry will have the means to invest in new technologies and innovations that will reduce harvest impacts and produce efficiencies while also contributing to the NSW economy. These benefits have been realised in the NSW lobster fishery which has already been reformed by the NSW Government.

The commercial fishing sector is an important part of the NSW economy - contributing \$96 million a year to gross value product. Sustainable, well managed fisheries provide NSW seafood consumers with ready access to high quality, locally caught seafood.

The benefits of the industry extend beyond just the commercial fishing sector. A viable and sustainable commercial fishing industry is also fundamental to:

- delivering value and security to the industry
- delivering sustainability outcomes for the state
- effectively managing the marine estate
- providing for Aboriginal fishing rights and interests
- providing flow on benefits for the recreational fishing sector.

The NSW Government is implementing reforms that will help improve viability and profitability and reduce regulation impacting efficiency of the industry. The purpose of the reform is to create an economically viable, environmentally sustainable and socially acceptable commercial fishing industry where fishers have the opportunity and certainty they need to grow their businesses. The reforms will also assist in supporting the post-harvest sector, including key institutions like co-operatives, supporting jobs in regional areas. The reforms also give the NSW Government and the community confidence that the resource is being managed sustainably.

These reforms have been shaped through a thorough and consultative process based on input from stakeholders and the best available independent advice and reviews over more than a decade. This has provided a rich evidence base of the issues that are important to the community and industry, and best practice fisheries management. Some of these reports include:

- *Report on structural adjustment in commercial fisheries in New South Wales*, Stevens 2007
- *Independent review of NSW commercial fisheries policy, management and administration*, Structural Adjustment Review Committee 2012
- *NSW commercial fisheries reform final recommendations on share linkages*, Structural Adjustment Review Committee 2015
- *Marine Fisheries and Aquaculture Draft Report*, Productivity Commission 2016

The NSW Government has recognised the importance of assisting active fishers through the reforms and providing them a good footing into the future, whilst also providing assistance and opportunities for those that want to exit the industry. This is being facilitated through a series of programs and assistance measures including:

- \$16 million to assist fishers to adjust their fishing businesses in line with the new share linkage arrangements, along with fishing business buy outs for those wanting to exit the industry
- low interest rate loans for eligible fishers requiring assistance to purchase shares
- grants of \$10 000 towards training expenses for fishers wishing to exit the industry
- professional advice grants of \$1000 each for advice to inform future business planning or advice and assistance in relation to the share trading market
- delaying increases to management fees above CPI until 2018 and continuing the current waiver of share transfer fees to give fishers more certainty
- grants of \$30 000 for co-operatives to seek advice on any business adjustments they may need through the reforms
- short term rent subsidies and standardised long term leases for fishing co-operatives on Crown land.

The reforms have provided fishers with confidence that the NSW Government is taking action. Fishers have traded more than 70,000 shares privately since the details of the reform were announced in May 2016.

After many years of failed attempts, it is imperative that this industry is adjusted correctly to ensure sustainability and viability of the industry for many years to come. The past provides a good indication of what will happen if these reforms are not implemented - an industry continuing to underperform due to significant latent effort being held with inactive fishers, a limited ability to improve the value of its products, overregulation causing inefficiency and lack of direct management for sustainability.

Similar reforms in other jurisdictions including South Australia and the Commonwealth have successfully improved the economic performance of commercial fisheries by retiring effort, shifting from input to output controls and by moving to tradeable property rights that are linked to access, effort or catch. Likewise the 2016 Queensland Green Paper (Attachment S) indicates that individual transferable quota give fishers secure access entitlements that reduce the race to fish and provide incentives to promote more sustainable practices.

A strong, sustainable and viable commercial fishing sector will provide benefits to our commercial fishers, others who are directly employed by the industry and consumers, as well as recreational fishers, the aquatic environment and Aboriginal communities.

ToR 1(a) - the history of commercial fishing in NSW, including reforms to the industry since 1994

Commercial fishing is an important industry for this State and has existed in NSW since colonisation.

The NSW fishing industry is unique: we have a highly variable catch, modest volumes and high diversity in the fishing sector. The NSW fishing industry is primarily made up of small family businesses that rely on local knowledge and skills, sometimes gained over generations.

The history of commercial fishing in NSW has been thoroughly researched. Reports on the history of commercial fishing in NSW include:

- *Fisheries Management and Resource Allocation in NSW*, Parliament of NSW Standing Committee on State Development 1997 (Attachment A)

- *Fisheries Structural Adjustment – Towards a National Framework*, Metzner and Rawlinson 1998¹
- *NSW Fishing Industry: Changes and Challenges in the Twenty-First Century*, Wilkinson 2004 (Attachment B)
- *Report on the performance of fisheries management in New South Wales*, Stevens 2005 (Attachment C)
- *Report on structural adjustment in commercial fisheries in New South Wales*, Stevens 2007 (Attachment D)
- *NSW Commercial Fishing Industry: background to the 2012 review*, Wilkinson 2013 (Attachment E)
- *NSW commercial fisheries reform final recommendations on share linkages*, Structural Adjustment Review Committee 2015 (Attachment F).

A key finding in relation to management of NSW fisheries to date is that when share allocations in 2007 ignored catch history this led to today's problems. "...overall, the manner in which shares were issued in these fisheries may be considered as a case of administrative failure, which, in turn has led to the current situation faced by fishers" (Stevens 2012). The Government's structural reforms to the industry will improve outcomes for fishers negatively impacted by previous decision-making.

The importance of industry input to these reforms has been recognised with the NSW Government thoroughly consulting at every step of the way, see Attachment M for a detailed description.

ToR 1(b) - the value of the commercial fishing industry to the NSW economy

Commercial fishing is an important sector in NSW and delivers widespread economic, social, and environmental benefits to the state.

- **Economic benefits** – commercial fisheries provides a direct economic benefit to the state. The industry contributes \$96million of Gross Value of Production (GVP)² to the NSW economy, directly employs 1,500 people, includes 1,300 registered fishing businesses³ and provides indirect employment and economic opportunities to the wider community. Most fishers are based in regional coastal towns, and in some instances, provide the main source of employment for the community. In addition, the industry provides locally sourced, fresh seafood and bait for recreational fishers. During the 1980s, imports accounted for at least 50%⁴ of the seafood consumed locally in Australia. This has now increased to 85%⁵.
- **Social and cultural benefits** – the industry contributes to the social fabric of the state, providing fresh, locally sourced seafood for the public. Fishing is also fundamentally

¹ Metzner, Rebecca & Rawlinson, Peter (1998). *Fisheries structural adjustment: towards a national framework*. Fisheries & Aquaculture Branch, Dept. of Primary Industries & Energy, Canberra. ISBN: 9780730662617

² *Fisheries, aquaculture and aquatic conservation key highlights and statistics 2014-15* available at www.dpi.nsw.gov.au/fishing/fisheries-key-highlights-and-statistics

³ NSW Commercial Fisheries Business Adjustment Program - Fast Facts (Attachment T)

⁴ *NSW Fishing Industry: Changes and Challenges in the Twenty-First Century*, Wilkinson 2004

⁵ www.foodauthority.nsw.gov.au/news/newsandmedia/ministerial/2016-05-30-seafood-labelling-on-the-menu-in-nsw

important to Aboriginal communities, which includes important support by Aboriginal commercial fishers for their communities. The commercial fishing industry adds significantly to the social identity of some coastal communities and attracts tourism to the regions. Tourism spending arising from the Sydney Fish Market alone contributes \$110 million to the NSW economy⁶.

- **Environmental benefits** – sustainable commercial fishing relies on healthy waterways and oceans. The industry provides invaluable information about environmental conditions on the ground and assists with providing information used to estimate fish stock status. Fishers are the beneficiaries of well managed waterways and suffer direct losses when environmental conditions are poor. The reforms the NSW Government is implementing will encourage sustainable fishing to the benefit of the marine environment and other sectors that rely on well managed fish stocks. Fishers are some of our greatest ambassadors for healthy aquatic ecosystems.

There has been a significant amount of research conducted on the benefits of the commercial fishing sector in NSW. In particular:

- *Social and economic evaluation of NSW coastal professional wild-catch fisheries: valuing coastal fisheries*, Voyer, Barclay, McIlgorm and Mazur 2016 (Attachment G)
- *A socio-economic evaluation of the commercial fishing industry in the Ballina, Clarence and Coffs Harbour regions*, Harrison 2010 (Attachment H)

In addition, the value of commercial fisheries and trends are available in:

- Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) Fishery Status Reports available at www.agriculture.gov.au/abares/publications
- Environmental Impact Statements and Fisheries Management Strategies developed for all NSW fisheries, available at www.dpi.nsw.gov.au/fishing/commercial/ea

Wild caught seafood competes with aquaculture and imported seafood for consumer dollars. Currently aquaculture contributes 1% and imports contribute 85% of domestic consumption. The NSW Government's commercial fisheries reforms will lead to more robust business models and see the commercial fisheries sector better able to compete in the market.

ToR 1(c) and (d): the scientific research underpinning fisheries management, and the current arrangements for the assessment of fisheries by the NSW Department of Primary Industries Fisheries Resource Assessment Unit

Management of fisheries in NSW relies on an evidence based approach which incorporates stakeholder input. NSW Department of Primary Industries (DPI) is widely recognised as a world class scientific research team that conducts research, collects data and provides scientific advice to inform management of the state's fisheries and aquatic environment. The key research programs are highlighted in the Fisheries Research Strategic Plan 2014-2018 which can be found at www.dpi.nsw.gov.au/content/research/fishing-aquaculture.

The Department runs a fisheries resource assessment program which monitors the status of key species that are harvested by commercial, recreational and indigenous fishers in NSW. The

⁶ *The economic and social impact of Sydney Fish Market*, Deloitte Access Economics 2016 (Attachment I)

program is underpinned by the Department's Framework for the Assessment of Harvested Fish Resources in NSW (see Attachment J). The Department publishes reports detailing the assessment outcomes at: www.dpi.nsw.gov.au/content/research/fishing-aquaculture.

The fisheries resource program underpins the management arrangements for sustainable harvest of the state's wild capture marine fisheries. This is currently done through Fishery Management Strategies which outline the management goals, objectives and strategies for each of the major commercial fisheries that are accompanied by Environmental Impact Assessments. These can be found at: www.dpi.nsw.gov.au/fishing/commercial/ea.

In 2016 DPI commissioned the *Review of the current NSW resource assessment framework and the performance of the arrangements employed to assess NSW fisheries* (McKoy and Stokes) (see Attachment K). This was an independent review into the resource assessment framework by two expert consultants with internationally renowned experience in fisheries management, research and fisheries policy. The intention of the report was to proactively identify better ways of conducting resource assessment and to:

- identify the issues surrounding environmental assessment of fisheries in recognition that the Fishery Management Strategies and their Environment Impact Assessments are now outdated
- improve alignment with the national Status of Australian Fish Stocks (SAFS) assessment process
- understand any changes required to the process to meet the new management arrangements under the reform
- identify the best way to incorporate input from external stakeholders
- obtain advice regarding the most effective means of prioritising species for assessment and the development of strategies to mitigate risks associated with species identified as overfished.

The Department intends to implement the recommendations of the report to ensure it is ready to deliver the necessary science and research to effectively input to the new management arrangements arising from the Business Adjustment Program. The Department will:

- develop a Harvest Strategy policy and framework to achieve ecological, economic and social objectives
- undertake a review of collection and quality of commercial catch information
- revise and update the Fisheries Management Strategies
- increase stakeholder engagement, including as part of the Total Allowable Fishing assessment and review process.

The Department will also adopt the SAFS framework for development of NSW domestic fisheries exploitation status assessments. This will improve the arrangements for research outcomes leading into the management of NSW fisheries and nationally.

These changes will provide greater consistency in assessment frameworks between jurisdictions and increase transparency to all stakeholders engaged in the stock assessment process.

ToR 1(e) - the NSW Government's Commercial Fisheries Business Adjustment Program and its aims

The primary aim of the Business Adjustment Program is to support the ongoing economic viability of NSW commercial fishers by linking shares with catch or effort.

Need for change

Currently commercial fisheries management arrangements control the way fishers operate (input controls) rather than the quantity of fish (quota) that is extracted, resulting in a hierarchy of complicated and duplicative regulations and rules being implemented to govern the taking of fish for sale. Shares that have been allocated to certain fisheries in NSW have not been linked with catch or effort. Allocation of the original shares was generous, evenly spread and many fishers do not use these access rights (shares).

This has resulted in substantial ongoing excess capacity in the commercial fishing industry. Over time excess capacity and this management structure have:

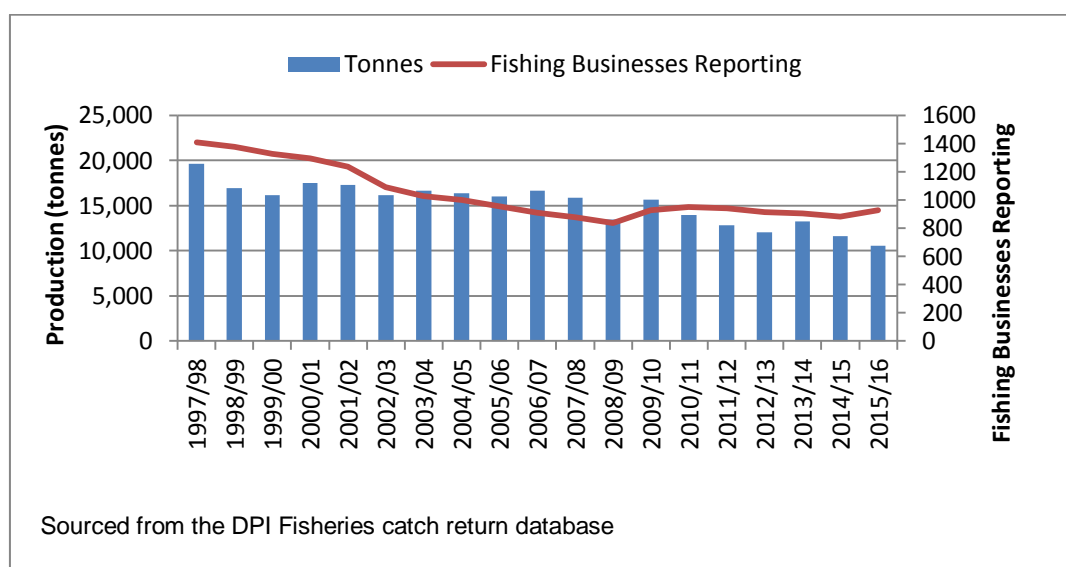
- driven a 'race-to-fish' incentive
- provided incentive to maximise catch rather than maximise the value of the catch
- provided limited opportunity for fishers to grow their businesses
- maximised business inefficiency and inflexibility
- limited the ability of the industry to adjust to unforeseen circumstances such as sustainability or environmental problems
- become highly complex to operate under, administer and enforce
- become over-regulated to account for the potential exercising of latent effort
- not provided strong access rights
- limited the use and value of commercial fishing shares and the businesses that benefit from them
- resulted in instability, threatening output, value and employment in the fishing industry
- driven uncertainty about the long term viability of the commercial fishing industry.

On the ground, this has resulted in:

- **Large numbers of inactive fishers and unused shares** – no fishing activity was reported for 13% of fishing businesses in the reforming fisheries in the 5 years prior to 2014. In addition these fishing businesses did not use 41% of their endorsements (or share packages) over that time.
- **Low average earnings for the industry** - in the five years to 2014 the median annual earnings for individual fishing businesses was \$28 000 at first point of sale⁷.
- **High rates of alleged non-compliance** - the excessive regulation that is required because of the reliance on input controls to manage catch means some fishers perceive that they cannot operate legally and earn a reasonable return. Of approximately 1,100 licenced fishers, nearly 75% have been issued a written caution, penalty infringement notice or had prosecution action instigated against them within the last 5 years.

Over time there has been a downward trend in the number of fishers who are active within the industry. The changing environment for fishers, including recreational and Marine Park closures, and other issues such as insolvency in businesses such as fishing co-operatives have also contributed to problems for industry.

⁷ Sourced from the DPI Fisheries catch return database.

Figure 1. Tonnage of commercial catch and reporting levels of fishing businesses over time.

In response to these issues, the government is implementing structural reforms to the commercial fishing industry.

Business adjustment program

The NSW Government is part way through implementing the Commercial Fisheries Business Adjustment Program. This program aims to foster an economically viable, environmentally sustainable commercial fishing industry where fishers have the opportunity and certainty they need to grow their businesses. The objectives of the program include:

- improving the long term viability of the NSW commercial fishing industry
- improving the strength and value of commercial fishers' shares by linking them to catch or fishing effort
- providing for autonomous adjustment over time
- providing for a more efficient industry operating in an environment of reduced red tape.

The program will help active fishers remain in the industry, provide them with a good footing into the future, and assist those wishing to exit the industry. This is being facilitated through a \$16 million assistance program, the majority of which will be directed to help fishers purchase the shares they need. This will ensure that those fishers with shares to sell will get the most money and those needing to purchase will get generous subsidies to assist.

The Business Adjustment Program is also being implemented in direct recognition of the importance of the industry being able to continue to provide the people of NSW with locally caught fresh seafood and bait for recreational fishing. Co-operatives play a critical role in the supply of seafood to market and as a point of contact for fishers. The Program also includes assistance measures that support co-operatives.

Further detail about the program is available at Attachment L and at www.dpi.nsw.gov.au/fishing/commercial/reform.

The NSW Government has previously reformed two other commercial fisheries, abalone and lobster 20 years ago, with positive results. These fisheries are now more sustainably managed, viable and profitable.

Consultation and expert advice

The Business Adjustment Program has been shaped through a thorough, transparent and consultative process. This has provided a rich evidence base of the issues that are important to the community and industry. It has also meant industry has had the opportunity to input into and influence the reform process.

Attachment M provides a timeline of the consultation process and key expert advice received in the development of the program since 2007. As a summary:

- **Significant consultation has occurred with industry** - the reports commissioned by the NSW Government have been shaped by the views of industry, community and stakeholders. Each step in the process of implementing the reforms involved public calls for submissions, regional meetings and stakeholder reference groups.
- **Independent oversight** - the SARC has provided independent oversight over the reform process, while consulting with industry throughout. This has ensured that their independent expert advice has driven the reform process along with input from stakeholders, and ensured transparency along the way.

In addition the program has been shaped by advice from multiple independent experts over a period of nearly 10 years. This includes:

- **The report on structural adjustment in commercial fisheries in NSW, Stevens 2007** (Attachment D) which highlighted the need for a structural adjustment of the commercial fishing industry and a proposed pathway for the adjustment.
- **The independent review into NSW Commercial Fisheries policy, management and administration** commissioned by the NSW Government in 2012 (the 'independent review', Attachment N). The report recommended implementing a comprehensive structural adjustment program supported by consultation and governance processes.
- **The Structural Adjustment Review Committee (SARC)'s report NSW commercial fisheries reform final recommendations on share linkages** (Attachment F). The SARC was commissioned by the government to recommend a pathway to implement a structural adjustment program. The Government response to the SARC's final recommendations is available at www.dpi.nsw.gov.au/fishing/commercial/reform/historical-docs
- **Probity advice and oversight** - an independent Probity Advisor has been engaged to oversee the Adjustment Subsidy Program to ensure a fair and transparent process.
- **Market design advice** - independent experts have been contracted to develop the subsidised share trading market software.

ToR 1e (i) the relevance of the Draft Productivity Commission Report into Marine Fisheries and Aquaculture

The approach being implemented by the NSW Government under the Business Adjustment Program is supported by the Productivity Commission's Inquiry into Marine Fisheries and Aquaculture Draft Report.

The Productivity Commission found that "commercial fisheries should move as a default position to apply transferable quota systems. This would result in fewer constraints on fishing practice and provide a more efficient and effective means of adhering to harvest limits." The Commission's draft report recognises that output, value and employment in the commercial fishing industry have been trending down for more than a decade. This has been the case for NSW with production rates and number of active fishing businesses decreasing over the last twenty years (Figure 1). It describes

the industry as suffering from “...outmoded fishery management policies, including the use of input controls” which have “suppressed productivity improvement, encouraged over-investment and discouraged structural adjustment”.

The draft report argues individual transferable quota systems, such as the share and effort linkages in the current NSW reforms, will “...help improve productivity in, and prospects for, the sector”.

The Commission’s draft report also provides other recommendations that the NSW Government will be implementing, including:

- reducing latent effort through running a fishing business buy out program prior to holding a share trading market
- providing clear guidelines on what will be taken into account in allocation decisions through the Independent Allocation Panel process.

ToR 1e (ii) and (iii) - the implementation of the restructure to date, and the impact on industry and regional communities to date, including economic, social and cultural impacts

Key milestones and activities to date

Industry has repeatedly called for certainty. Since the announcement of the Business Adjustment Program in May 2016 industry has been responding - many commercial fishers have already started to adjust their businesses in the certainty of the new share linkage arrangements due to commence in 2017 and many other have been taking up the assistance measures.

Key milestones include:

- **Significant numbers of shares being traded** – Since the announcement, share transfer applications have spiked up to three times as much as the average for the last ten years which has been around 20 per month. This represents more than 70,000 shares being privately traded. By investing now, all these businesses are sending the strongest possible signal that they intend to continue to provide seafood and support their communities.
 - The share trading register at Attachment O provides a snapshot of the shares traded between 17 April 2016 (two weeks prior to the announcement) and 23 November 2016.
- **Fishing businesses are already getting ready for the changes** - Many fishers have invested time, money and effort on the strength of the NSW Government’s announcements. Two thirds of the share classes that fishing businesses hold now do not need additional shares in order to continue fishing at their highest levels recorded in the past five years. Of the one third that need to buy more shares, more than half need 50 shares or less.
- **Preview share trading market** - 452 businesses registered for the preview share trading market that was held in November 2016. This provided shareholders an opportunity to practice placing bids and offers and see how the program works.
- **Training for subsidised share market** - More than 300 fishers attended training sessions for the subsidised share trading market delivered along the coast.
- **Fishing business buyouts** - 115 applications for fishing business buyouts have been submitted and continue to come in.

- **Low interest rate loans** - 100 fishers have applied for these loans to help them buy more shares in the subsidised market, with applications continuing to be received.
- **Ongoing independent advice to ensure effective implementation** - The NSW Government recently engaged an independent consultant, Neil MacDonald, to advise of issues that should be considered for the implementation of the Business Adjustment Program. The report and NSW Government's response is available at www.dpi.nsw.gov.au/fishing/commercial/reform.

Components of the program that have not yet fully progressed are:

- **The establishment of the Commercial Fisheries Advisory Council** - The council will provide independent advice to the Minister for Primary Industries on commercial fishing in NSW, including the implementation of the reforms. Consultation with industry has recently been undertaken to provide input to the establishment of the Council (see Attachment M).
- **Peak body for industry** - A recommendation of the 2007 Stevens report was the need for a united commercial fishing peak industry group to help provide consolidated input into commercial fisheries reform processes.
 - The NSW Government previously ran a tender for industry consultation and liaison services which resulted in no suitable candidates. While government can help support and facilitate the development of this group, it is an initiative that needs to be driven and funded by industry for it to advocate for industry.

Additional areas that could be developed to further ensure that the reforms have lasting and effective impacts include:

- Better use of the Ministerial Fishing Advisory Committee to harmonise interactions with all sectors that rely on our waterways and our fish stocks - this includes the recreational fishing sector, Aboriginal communities, the environment and non extractive uses.
- Improving public perception and helping create a social licence to support professionalism of the commercial fishing industry. The industry provides local, fresh seafood to consumers and needs to be grown to ensure we can continue to source seafood from local, viable producers.
- Providing certainty to industry about future management arrangements through implementing regulations on linkage arrangements as soon as possible.

ToR 1e (iv) - the economic modelling underpinning the restructure and any independent analysis of that modelling

The structure of the Business Adjustment Program is based on different options and the impact of these options on fishing businesses.

Consultation papers were released in 2014 for each share fishery which examined the different ways that share linkage could occur. The SARC also conducted analyses on the impacts of different share linkage options which was led by Sevaly Sen, a fisheries economist of more than 20 years' experience.

In addition, the SARC sought an independent review of the economics surrounding the share linkage options. This was conducted by AgEconPlus in 2015 (see Attachment P). This analysis included relevant cost information from other comparable Australian commercial fisheries that allowed a means of estimating share value and other information relevant to fishing business owners. The study further found that only one of the five NSW commercial fisheries analysed was estimated to earn a positive return on investment and that there is an opportunity to improve the overall profitability of NSW Commercial Fisheries.

An independent review of the NSW Government's approach to implementing the structural adjustment program has also been undertaken by Professor Jacob Goeree⁸. The market design to be used by DPI Fisheries meets the recommended structures listed by Goeree. However, there are two areas where the implementation of the program has deviated from Goeree's recommendations to enable prioritising of subsidy to active fishers and those with a share deficit in line with industry feedback:

- **Removal of some flexible (contingent) offers** - the types of bids that were allowed within the market needed to be kept simple to reduce complexity and allow for flexibility for the market to find solutions. Package exit offers remain the only package or contingent bid type in the market.
- **Transparent inclusion of additional constraints** - an extensive suite of government objectives have been included that will, for example prioritise active fishers and satisfy as many exit offers as possible.

ToR 1e (v) - the approach of other jurisdictions

Advanced fisheries around the world have well developed quota management arrangements. The NSW Government has relied on a broad range of expertise over many years in developing the future direction for commercial fisheries management in NSW. Those experts have experience in Australia and across the world, and in diverse fields such as natural resource and market economics, natural resources law, fisheries management and ecology.

There have been a number of reviews conducted on the management and operation of fisheries across other jurisdictions. Recent reviews in Australia have indicated that most jurisdictions need to amend their approach to fisheries management and move to quota systems and establish tradeable property rights. This includes linking shares to access, effort or catch for improved management and sustainability in the commercial fishing sector.

These reviews include:

- *Marine Fisheries and Aquaculture Draft Report*, Productivity Commission 2016 (Attachment Q)
- *Taking Stock: modernising fisheries management in Queensland* by MRAG Asia Pacific 2014 (Attachment R)
- *Green Paper on Fisheries Management Reform in Queensland* 2016 (Attachment S)
- *NSW Fishing Industry: Changes and Challenges in the Twenty-First Century*, Wilkinson 2004 (Attachment B)
- *Report on the performance of fisheries management in New South Wales*, Stevens 2005 (Attachment C)
- *Report on structural adjustment in commercial fisheries in New South Wales*, Stevens 2007 (Attachment D)

⁸ Review of the NSW Commercial Fisheries Exit Grant Proposal available at www.dpi.nsw.gov.au/data/assets/pdf_file/0006/631734/Review-of-the-NSW-Commercial-Fisheries-Exit-Grant-Proposal-.PDF