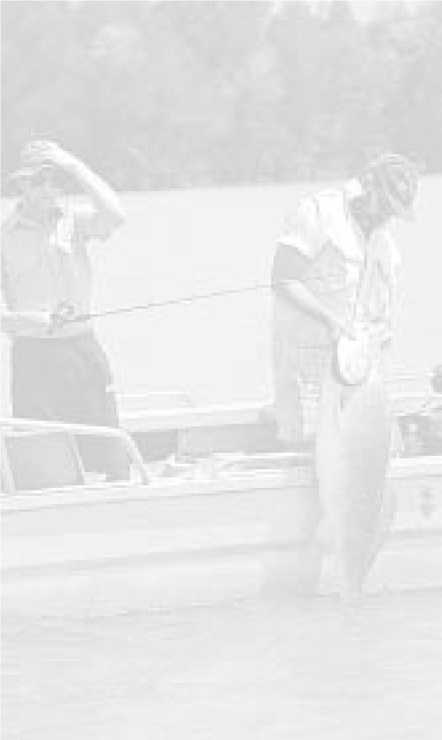
9-1998

Final report: Future management of the aquatic charter industry in Western Australia.

Tour Operators Fishing Working Group

FINAL REPORT

FUTURE MANAGEMENT OF THE AQUATIC CHARTER INDUSTRY IN WESTERN AUSTRALIA



PREPARED BY THE
TOUR OPERATORS FISHING WORKING GROUP
FOR PRESENTATION TO THE MINISTER FOR PRIMARY INDUSTRY; FISHERIES

SEPTEMBER 1998

TABLE OF CONTENTS

Appendix D
Consultation Process

Appendix E
Results of Consultation

Appendix F
Participants in Consultation

Foreword

Over the past decade, increasing population, a growing tourism industry, improved facilities at many coastal locations and better access to remote areas have led to a significant growth in regional tourism opportunities in Western Australia.

Many of these opportunities are based upon the use of the nearshore aquatic environment and fish resources.

A major challenge for the Western Australian community is to ensure the sustainability of these resources in the face of growing pressure from tourism, and to ensure that the industries based on these resources are able to develop in a controlled and sustainable fashion which will optimise long-term benefits to the community.

One of the key tourism service industries now developing is the aquatic charter industry. Since 1990 the number of charter boats providing fishing, whale watching, diving or other aquatic ecotourism services has grown significantly.

In 1990 an estimated 40 boats provided fee-for-service fishing charters to recreational fishing parties. About half of these boats also held a Western Australian commercial fishing boat licence. In 1997 there were 135 confirmed operators within Western Australia's tour and charter industry.

While all aquatic charter operators are required to meet minimum safety standards under Department of Transport regulations, management of the industry in relation to environmental and other impacts tends to be fragmented, with individual Government agencies managing differing aspects of the industry under a range of legislative controls.

Charter fishing operators may significantly increase the recreational exploitation of fish stocks, and intense competition for access to prime fishing locations may result in localised fish stock depletion and irresponsible fishing practices which focus on reducing costs and increasing catches for clients, rather than conservation and sustainable fishing.

In addition, the quality of the recreational experience for individual tourists may be adversely affected by unrestricted access to some areas where the tourism experience depends for its appeal on the enjoyment of pristine uncrowded environments.

While not specific to the aquatic charter industry, other environmental impacts of unrestricted access by charter operators may include anchor damage in coral reef areas, problems caused by the disposal of effluent, erosion and environmental degradation through increased use of wild environments for camping and increased traffic on ungraded tracks.

An important issue for the developing industry is the establishment of minimum customer service and other industry standards to ensure client satisfaction and support further promotion of a quality tourism service industry.

The Tour Operator's Fishing Working Group (TOFWG) was established by the Hon Monty House MLA, Minister for Fisheries, in recognition of the growing importance of this element of the tourism industry and in recognition of the need to ensure that the development of this industry occurs in an ecologically sustainable framework across the State.

In September 1997, the TOFWG released the discussion paper *Future Management of the Aquatic Charter Industry in Western Australia*, which resulted from extensive consultation with the aquatic charter industry. Submissions to the discussion paper were received from aquatic charter industry members, commercial and recreational fishers, the community and other stakeholders.

The recommendations outlined in this report establish a management framework within which the aquatic charter industry may continue to develop, and which will ensure the long-term sustainability of the natural resources on which the industry is based.

The Working Group believes that the aquatic charter industry has a major role to play in Western Australia's growing eco-tourism and regional recreational fishing industry, and that charters will increasingly contribute significant economic benefits to regional centres by providing an improved range of experiences for visitors.

For this to occur, the industry itself needs to take up the challenge of supporting and promoting regulation aimed at the conservation of fish resources and the aquatic environment, and developing industry practices which will ensure high standards of customer service and high levels of customer satisfaction.

The recommendations contained within this report have been submitted to the Minister for Fisheries for consideration.

The TOFWG looks forward to the development and sustainable future of the aquatic charter industry.

Doug Bathgate.

Doug Bathgate
Chairman, Tour Operators Fishing Working Group, June 1998

Working Group Terms of Reference

The Tour Operator's Fishing Working Group (TOFWG) was established by the Hon. Monty House MLA, Minister for Fisheries, in recognition of the growing importance of the aquatic charter industry as an element of the tourism industry and in recognition of the need to ensure that the development of this industry occurs in an ecologically sustainable framework across the State.

The terms of reference for the Tour Operator's Fishing Working Group are to:

1. Advise the Minister for Fisheries on preferred management arrangements for the tour operators fishing industry.

2. Define the range of activities covered by the Working Group, noting the requirements of the *Fish Resources Management Act 1994*.

3. Establish sub-committees as appropriate to consider issues of special concern to sections of the tour operators industry with particular reference to relations between consumptive and non-consumptive components of the industry.

4. Provide recommendations to the Minister for Fisheries on methods of operation of tour operators.

5. Provide recommendations to the Minister for Fisheries on the most appropriate method of implementing a charter fishing licensing management scheme for Western Australia.

6. Provide recommendations to the Minister for Fisheries on any other matter that the Working Group may consider pertinent to the proposed management arrangements.

Working Group Membership

Membership of the Working Group was selected to represent as many sectors of the Tour Operators Industry as possible, and provide a wide range of input from relevant Government agencies.

Working group members are:

Chairman

Doug Bathgate - Gascoyne Development Commission

Committee members

Les Bail - Aquatic Charter Operator

Hamish Crawford - Department of Conservation and Land Management

Andrew Cribb - Fisheries WA

Brian Kirkwood - Aquatic Charter Operator and member on WA Charter Boat Association

George King - Aquatic Charter Operator

Mark Longhurst - Aquatic Charter Operator and President of Kimberley Charter Boat Association

Danny O'Sullivan - Aquatic Charter Operator and member of Kimberley Charter Boat Association

Kay Webber - Recreational Fishing Advisory Committee

Rob Wuillemin - Aquatic Charter Operator and member of WA Fishing Industry Council Board

Executive Officer

Ben Fraser, Fisheries WA

Other Participants

Lindsay Harbord	Chairman, Recreational Fishing Advisory Committee
Brett McCallum	Chief Executive, WA Fishing Industry Council
Frank Prokop	Fisheries WA
John Seaton	Department of Transport
Kevin Tonkin	WA Tourism Commission

Summary of Recommendations

2.0 WESTERN AUSTRALIAN AQUATIC CHARTER INDUSTRY

Integrated management

1. *That Government adopt this report as a strategy for a 'whole of Government' approach to management of the aquatic charter industry and this report be recognised as a key element in the Government's 'Nature Based Tourism Strategy'.*

2. *a) That an investigation into the feasibility of a 'whole of Government' management strategy through high level discussions between relevant Ministers and Government agencies be adopted.*

   b) That a task force be formed immediately to formulate a memorandum of understanding between appropriate departments.

3.0 CONSERVATION AND SUSTAINABILITY ISSUES

Resource allocation

3. *That the catch from charter operations be recognised and managed as part of the total recreational catch.*

4. *The aquatic charter industry should be recognised as an important stakeholder in the management of recreational fisheries and the marine environment and included in any consultation process to develop recreational management of the resource.*

5. *a) That management arrangements, in addition to general recreational fishing regulations, be implemented to maintain the catch from charter operators at sustainable levels.*

   b) That excessive catches be limited by management measures which may include accumulation limits and lower bag limits for fishing charter clients.

Growth of industry

6. *That a new licence category under the Fish Resources Management Act 1994 (WA) (FRMA) be introduced to licence aquatic charter operators that fall within the jurisdiction of the FRMA.*

7. *That Fisheries WA and CALM develop a Memorandum of Understanding to ensure that existing licensing arrangements administered by CALM and the aquatic charter licence proposed in this paper are managed in a coordinated and cooperative manner to ensure protection of environmental and other resource values and sustainability of aquatic charter operator opportunities.*

8. *a) If the number of licences in a particular area needs to be limited for resource management reasons, then a history of investment in the aquatic charter industry prior to 12 September 1997 will be part of the selection criteria for access determination.*

b) Until the relevant impact of the charter industry can be determined, as a precautionary measure, a ceiling for the number of operators in each region should be established.

c) Any further investment after that date will be at the operator's own risk as there will be no guarantee of success.

d) A working group involving the aquatic charter industry and the RFAC should be established immediately to determine, in consultation with CALM and Fisheries WA, what the number of operators should be in each region.

9. *a) That there be two classes of aquatic charter licence:*

1) aquatic ecotourism; and

2) fishing tours and aquatic ecotourism.

"Aquatic ecotourism" means a commercial fee for service operation which provides services relating to fish in their natural environment and includes the viewing or feeding of fish but does not include the taking of fish.

"Fishing tours" is defined as a commercial fee for service operation which provides services relating to the take, capture or catching of fish.

b) Any scale of fees for licenses should reflect the potential impact on the resources.

10. *The Offshore Constitutional Settlement (OCS) needs to be adjusted to ensure management of recreational and charter fishing for all species is vested in the State and associated management costs should be met through Federal funding.*

11. *Non-fishing charter activities within marine parks and charter activities subject to management under the Wildlife Conservation Act 1950 and CALM Act 1984 and other zonal access should be treated separately, and managed under existing arrangements. Further development of management for zonal access to be subject to consultation with the aquatic charter industry and be consistent with regional fisheries management plans for recreational fishing and marine conservation areas.*

12. *Fees should be set according to cost-recovery principles, and initially based on the cost of management recommendations detailed in this paper.*

Excess Capacity in Industry

13. *That, where there is a likelihood of over-exploitation of fish resources or unacceptable impact on the quality of the tourism experience, minimum performance criteria should be developed for continuing eligibility for aquatic charter licences.*

Dual Licensing and Risk of Escalating Effort

14. *That a commercial fishing trip and a charter fishing trip cannot be conducted at the same time.*

15. *Operators who hold both a commercial fishing licence and an aquatic charter fishing licence should be required to clearly nominate the nature of their fishing trip to a Fisheries WA office before leaving port.*

16. *Any fish caught on a charter trip should be taken under recreational or charter fishing regulations, and are not saleable.*

17. *That any authorisation associated with fishing boat licences allowing the sale of recreationally caught fish be removed from charter fishing vessels.*

Lack of Integration with Management of other Sectors

18. *That the charter fishing industry be included in an integrated approach to fish resource management and that in any review of the commercial wetline fishery,the recreational charter industry fishing zones be considered as a basis for resource sharing.*

Unknown Catch / Impact on Resource

19. *That all licensed aquatic charter operators be required, as a condition of licence, to submit a periodic and detailed research log book to Fisheries WA or the Department of Conservation and Land Management as appropriate.*

20. *An integrated database and collection system for aquatic charter operators be developed to provide Fisheries WA with more detailed information on catch, effort and fish population structure.*

Localised Stock Depletion

21. *That the Western Australian coast be broken into five zones of operation, consistent with regional recreational fisheries management strategies, and that access for charter operators will be allocated according to appropriate management objectives or natural resource carrying capacity.*

22. *In assessing applications, the charter and other fishing effort that exists within the area, and whether the area can sustain additional pressure, will be taken into consideration.*

23. *That applications must include a business plan explicitly detailing the proposed operation.*

24. *That access to the zones be determined by demonstrated history of commitment* to *the industry or predetermined selection criteria.*

25. *That assessment of applications would follow a process approved by the Minister for Fisheries. Applications should be considered by a committee especially established for assessment purposes. The aquatic charter industry should be represented by a sub-committee*

and that the process be formulated in a 'whole of Government' approach. Provision should be made for an appeal process.

Deepwater Fish - Survival

26. *Bag limits for charter clients should be adjusted to assume a 100 per cent mortality of demersal fish caught in waters greater than 20 metres in depth.*

27. *Consideration should be given to the introduction of controls pertaining to the catch-and-release of fish, particularly on ultra light line class. This issue should be dealt with during the establishment of regional recreational fishing management plans.*

28. *The effectiveness of legal sizes for identified species should be reviewed by regional planning groups, and alternative stock conservation strategies developed where practical.*

28a. *Consideration should be given to the prohibiting of the taking of finfish, crustacea and molluscs using underwater breathing apparatus.*

(Recommendations 26, 27 and 28 are conditional upon these issues being dealt with during the establishment of regional recreational fishing management plans).

4.0 ECONOMIC ISSUES

Access Fee and Cost Recovery

29. *That the cost of management and consultation be borne by those licensed in the industry and consideration be given to a staged implementation of this policy in consultation with the industry.*

30. *Access fees should be charged in proportion to the level and type of use.*

31. *The allocation of access should meet with the principles of the National Competition Policy (Hilmer), and allow for rational business planning and provide a basis for investment confidence on the part of operators. The industry strongly recommends that licence holders be able to benefit from any goodwill value of the business associated with the transfer of licence, provided that the continuation of the licence does not adversely impact on the sustainability of the resource.*

32. *That revenue from charter licence fees be directed into a trust fund for the management and future development of the charter industry. Priority funding should be allocated to:*

- *implementation of recommendations in this report;*
- *establishment of a research program;*
- *establishment of a peak body; and*
- *ongoing management review.*

5.0 ENVIRONMENTAL ISSUES

Number of Participants in Limited Areas

33. *Access arrangements should consider conservation, tourism and environmental impacts on fish, fish habitat and other resources.*

34. *That the aquatic charter industry develop codes of conduct to encourage conservation oriented fishing practices and environmentally friendly operating standards.*

35. *That the aquatic charter industry encourage the development of industry associations to pursue the above recommendations.*

6.0 SOCIAL ISSUES

Industry Image

36. *That the establishment of industry associations be encouraged and that these associations develop a code of conduct that will enable industry to market its services based on the provision of a quality, association-endorsed charter operation. The peak industry associations should develop a relevant accreditation and training program in consultation with appropriate training bodies.*

37. *That good safety practices be incorporated into a code of conduct.*

38. *That there be, as a requirement of licensing, a minimum public liability insurance held by the operator.*

Management Advice - Representative Structure

39. *That the aquatic charter industry be encouraged to form a peak industry association.*

40. *That the peak aquatic charter industry association be given recognition on the Recreational Fishing Advisory Committee (RFAC) in the same manner as the Western Australian Recreational and Sportfishing Association. This will require an amendment to the FRMA.*

41. *That, where appropriate, the aquatic charter industry be represented on other management advisory committees and marine reserves planning groups, marine parks advisory authority and other government working groups as applicable.*

1.0 INTRODUCTION

1.1 WA'S AQUATIC ENVIRONMENT: BASIS OF THE AQUATIC CHARTER INDUSTRY

WA's 12,000km coastline is recognised world-wide as providing a wide range of attractive and pristine environments. The oceans, estuaries and rivers along WA's coast are home to a variety of natural attractions such as world-class recreational fishing and diving, observation of marine animals and other aquatic leisure activities.

In many cases the best way to enjoy the tourism opportunities available in WA's aquatic environment is to employ the services of a tour or charter operator. The benefit of a tour or charter operator is that they are able to provide access where it may not otherwise be possible. In providing this access they are able to optimise the recreational experience with their knowledge of local environments and phenomena.

1.2 RATIONALE

Utilisation of WA's marine resources is not limited to one sector of the community. It has traditionally been the commercial fishing sector that has been perceived as having the greatest impact on fish resources. Consequently, this sector has been the focus for management. There are approximately 1700 fishing boat licences in WA, and when combined with various Managed Fishery Licences, it can be seen that there are a large number of commercial licensees who participate in a wide variety of commercial fishing activities.

More recently, fisheries management agencies have come to appreciate the importance of considering the wider community and the involvement of different sectors in the use of marine resources. In WA, an estimated 600,000 people participate in recreational fishing each year. In addition, approximately 50,000 licences for leisure craft are issued annually by the Department of Transport and there is increasing recognition of the subsistence fishing activities undertaken by aboriginal communities around WA's coast (primarily north of Carnarvon).

The Tour Operators Fishing Working Group (TOFWG) was established in recognition of the aquatic charter industry's role in the use of marine resources and the need for this sector to be managed.

With the exception of non-fishing charter activities within marine parks, and charter activities involving marine wildlife, the aquatic charter industry is essentially an open access industry, and this has allowed the industry to expand significantly over the past 10 to 15 years. If the aquatic charter industry is not managed, this trend is likely to continue until the industry is over-capitalised and the fish resource over-exploited.

There are two main areas of concern regarding the aquatic charter industry in WA, both of which relate to the open access nature of major components of the industry:

1. *the negative biological and economic impacts which result from over-capitalisation of the industry where there are not already management mechanisms in place to deal with adverse impacts; and*

2. *the poor quality of service provided by some operators - tarnishing the reputation of the wider industry.*

The ability for commercial fishermen to enter the aquatic charter industry part-time is an issue which has implications for both of the above points.

1.3 OBTAINING INFORMATION ON THE AQUATIC CHARTER INDUSTRY

Given the lack of formal management of the aquatic charter industry, with the exception of non-fishing charter activities within marine parks, and charter activities involving marine wildlife, there has been very little information gathered on the characteristics of the industry as a whole.

To obtain information about the aquatic charter industry, the TOFWG and Fisheries WA identified known and potential aquatic charter operators. Operators were identified via a number of sources which included Fisheries WA District Offices, half page advertisements in the *Western Fisheries* magazine, WA Department of Transport Special Passenger Vessel (SPV) licence listings, and Professional Fishermen's Associations affiliated with the WA Fishing Industry Council (WAFIC).

To obtain vital information on the aquatic charter industry, a questionnaire was developed and sent to a total of 350 identified aquatic charter operators. In total, 135 completed questionnaires were received by Fisheries WA. A copy of the questionnaire can be found at Appendix B.

1.4 CONSULTATION

The TOFWG recognised the importance of thorough consultation with the aquatic charter industry and other relevant stakeholders to ensure the views of these groups were represented in the working group's deliberations.

An outline of the consultation process can be found at Appendix D. Results of consultation can be found at Appendix E and participants in the consultation process are listed in Appendix F.

2.0 WA'S AQUATIC CHARTER INDUSTRY

2.1 INDUSTRY PROFILE

In its present form, the aquatic charter industry in WA is essentially an open access industry with the exception of specific activities managed by the Department of Conservation and Land Management (CALM). Industry participants can be categorised under three headings according to the type of charter they provide. These categories are:

1. *fishing charters;*
2. *aquatic ecotourism charters; or*
3. *a combination of both 1 and 2.*

The freedom of entry aspect of this industry (with the exception of type 2 tours in marine parks or those involving marine wildlife which are managed by CALM) is the basis of all major issues facing the aquatic charter industry and its future management. These major issues include growth of industry, overcapitalisation of the industry, potential to impact on the resource, and the current standard of service provided. These issues are addressed in greater detail in this paper.

Analysis of the responses to the questionnaire illustrates that the aquatic charter industry has undergone strong growth across the State and that if open access were to remain in place it is likely that this trend will continue. When analysed regionally it is clear that the mid-west and north-west regions of WA possess relatively large charter fleets, with continuing strong growth.

Additionally, regions north of the Perth metropolitan area exhibit strong fluctuations in charter boat effort through the course of a year. It is likely that the strong seasonal trends that exist are the result of part-time operators and mobile operators taking advantage of optimum climatic and tourist seasons.

Results of the analysis of the questionnaire data and a breakdown and description of the five coastal zones is contained in Appendix C.

2.2 REGULATIONS GOVERNING THE AQUATIC CHARTER INDUSTRY

Presently there are three government departments with varying degrees of jurisdiction over the aquatic charter industry: Fisheries WA, CALM, and the Department of Transport. With the exception of charter activities managed by CALM, there is very little regulation of WA's aquatic charter industry.

Currently the primary requirement to become an aquatic charter operator is that the vessel used is appropriately surveyed and licensed by the Department of Transport. Specifically, charter boats are required to hold a Special Passenger Vessel (SPV) licence. Operators who wish to operate within marine parks or interact with marine wildlife are required to obtain a licence from CALM. These licences require operators to submit records or logs in relation to their activities. Currently there is no requirement for other operators (eg. charter fishing operators) to record or submit recordings of their activities.

2.2.1 Department of Transport

The Department of Transport surveys vessels and issues licences to ensure the vessel is safe for the type of work intended. The majority of survey in Western Australia are specified within the Uniform Shipping Laws Code (USL Code).

Specifically there are three classes of licence:

1. *SPV (Special Passenger Vessel) - carrying greater then 12 passengers*

2. *Non passenger carrying - carrying up to 12 passengers*

3. *LFB (Licensed Fishing Boat) - issued by Fisheries WA.*

For each of the above class of licence there are five categories relating to the waters in which the vessel is permitted to operate:

1. *travelling greater than 200 nautical miles offshore;*

2. *between 30 and 200 nautical miles offshore;*

3. *up to 30 nautical miles offshore;*

4. *only in sheltered waters; and*

5. *inland waterways only.*

2.2.2 Department of Conservation and Land Management

The Department of Conservation and Land Management (CALM), which manages charter activities, operates under two pieces of legislation: the *Conservation and Land Management Act 1984* and the *Wildlife Conservation Act 1950*. CALM is responsible for the management of all marine conservation reserves vested in the National Parks and Nature Conservation Authority and the management and protection of wildlife throughout the State. With respect to the aquatic charter industry, CALM manages nature conservation, recreation and nature-based tourism, management planning, wildlife research and management, information and education programs in conservation and recreation, and liaison with interest groups. (Government of Western Australia, 1994)

All aquatic charter operators conducting commercial activities within marine nature reserves and marine parks, with the exception of those conducting fishing activities, are required to obtain a licence from CALM. Licences have conditions attached to ensure the protection of environmental and other management values, and require operators to submit records of their operations. In some cases, access is limited.

In addition to this, aquatic charter operators throughout the State who interact with marine wildlife such as whales are required to be licensed by CALM. These licences also involve operating conditions and reporting requirements.

CALM has two levels of licensing:

1. *T - Class: open access to activities that CALM manages through a code of conduct. 90 per cent of licences issued by CALM fall into this category.*

2. *Limited Access: for environmental or management reasons (not industry focused). 10 per cent of licences issued by CALM fall into this category.*

2.2.3 Fisheries Department

The legislation under which Fisheries WA operates is the *Fish Resources Management Act 1994* (FRMA). Fisheries WA administers the protection of all fish and fish habitats in WA waters through this Act. Fisheries WA manages fish resources in a variety of ways, including the development and implementation of management plans for certain species, areas or activities, licensing of commercial or recreational fishing activities, and the closure of areas to activities, either completely or seasonally.

Currently Fisheries WA does not actively manage the sections of the aquatic charter industry that fall within the jurisdiction of the FRMA. However, aquatic charter operators are required to adhere to recreational fishing regulations (size, bag and possession limits) specified within the *Fish Resources Management Regulations 1995*.

A number of aquatic charter operators are able to sell recreationally caught fish by virtue of a condition on their commercial Fishing Boat Licence (FBL), which is in contradiction of the FRMA. 35 per cent of respondents to the Working Group Questionnaire indicated that they have a FBL. When considering this number, it should also be noted that for a variety of reasons, respondents may not have disclosed all licences that they hold.

It is difficult to enforce the recreational fishing laws for aquatic charter operators who hold a FBL, given that it is almost impossible to prove which fish have been caught recreationally and which have been caught “commercially”. Additionally, there is concern that unscrupulous operators who hold a FBL may use the same argument to circumvent management arrangements for commercial fisheries.

2.3 INTEGRATED MANAGEMENT

Clearly all three government agencies (Fisheries WA, CALM and Transport) have some regulatory roles and responsibilities with respect to the aquatic charter industry. If the industry is to be managed effectively and efficiently, it is necessary for these agencies to have a close working relationship. In the longer term, legislative changes may be required to achieve a 'whole of government' approach to industry management.

The TOFWG believes it is vital that an agreement in the form of a Memorandum of Understanding between the three agencies is developed as soon as possible to ensure efficient and effective management of the aquatic charter industry.

The Working Group envisages this 'whole of government' approach would initially encompass a 'one-stop shop' for licensing.

Another important strategy for integrating management and development of the aquatic charter industry is to ensure the industry is involved in the Government's 'Nature Based Tourism Strategy'. The Western Australian Government has developed the Nature Based Tourism Strategy to ensure that WA's natural assets are recognised and managed in a sustainable way. The Nature Based Tourism Strategy for WA is based on five guiding principles:

- *Conserving the natural environment,*
- *Involving and benefiting local communities,*
- *Improving knowledge,*
- *Providing quality products and service; and*
- *Fostering an effective and efficient industry.*

The recognition of this report as a key element in the Nature Based Tourism Strategy will help ensure the aquatic charter industry is involved in shaping the direction of nature-based tourism. The aquatic charter industry will have an important role in determining directions the nature-based tourism industry should take; assisting in shaping policy; monitoring industry activities and taking appropriate action; and developing an effective industry body which is representative of the nature-based tourism industry (Government of Western Australia, 1995).

Recommendations

1. *That Government adopt this report as a strategy for a 'whole of Government' approach to management of the aquatic charter industry and this report be recognised as a key element in the Government's 'Nature Based Tourism Strategy'.*

2. *a) That an investigation into the feasibility of a 'whole of Government' management strategy through high level discussions between relevant Ministers and Government agencies be adopted.*

   b) That a task force be formed immediately to formulate a memorandum of understanding between appropriate departments.

3.0 CONSERVATION AND SUSTAINABILITY ISSUES

3.1 OBJECTIVES

- *To conserve fish stocks and fish habitats for the viability of the aquatic charter industry.*

- *To manage the aquatic charter industry as part of a holistic approach to fish resource and habitat management.*

3.2 CURRENT ISSUES AND RECOMMENDATIONS

3.2.1 Resource allocation

A key question is whether the charter fishing industry should be considered as part of the recreational fishery or as a separate entity. Clearly the charter fishing industry and the commercial fishing industry are distinct, given that the commercial fishing industry gains direct economic benefit from the sale of fish, while the charter fishing industry's revenue base is its clients - recreational fishers and aquatic eco-tourists.

The charter fishing sector and the recreational fishing fraternity are much more closely aligned, as illustrated by the following similarities

- *species targeted;*
- *gear used; and*
- *motivation for going fishing.*

These similarities mean management objectives for fish stocks will be the same for the recreational fishing sector and the aquatic charter industry.

However, there are also clear differences between these two sectors. The fact that the charter fishing industry operates on a fee-for-service basis is the most obvious. Other differences include the skill level of the operator and the impact this has on the client's ability to catch fish; the non- consumptive component of many aquatic ecotourism charter operations; and the educative role a good charter operator can play.

These differences mean that charter fishing operators compete directly for both access and catch with recreational fishers and some commercial fishing operations. Therefore, there must be agreement on the relative resource share for each sector to ensure a sustainable level of exploitation is not exceeded.

The control or reduction of access by commercial fishing activities, stricter bag limits on recreational fishing, the introduction of accumulation limits for recreational fishing, designation of recreational fishing priority areas, and the establishment of gear or catch restrictions in specific areas should all be considered as management options to conserve fishing quality and the development of charter fishing tourism opportunities.

Recommendations

3. *That the catch from aquatic charter operations be recognised and managed as part of the total recreational catch.*

4. *The aquatic charter industry should be recognised as an important stakeholder in the management of recreational fisheries and the marine environment and included in any consultation process to develop recreational management of the resource.*

5. *a) That management arrangements, in addition to general recreational fishing regulations, be implemented to maintain the catch from charter operators at sustainable levels.*

   b) That excessive catches be limited by management measures which may include accumulation limits and lower bag limits for fishing charter clients.

3.2.2 Growth of industry

There has been a significant growth in the number of participants within WA's aquatic charter industry, but there is no information on how large an aquatic charter industry WA may be able to sustain, either economically or biologically. In September 1990 it was thought that approximately 40 boats in WA were providing charter fishing services (Millington, P. 1990). There are now 135 confirmed aquatic charter operators in WA, providing services which include charter fishing.

Over the seven year period from 1990 to 1997 there was a 337 per cent increase in the number of aquatic charter operators (Figure 1). A continued expansion at this rate would see approximately 1500 aquatic charter operators by the year 2010. Members of the Working Group believe that this rate of expansion is certainly not in decline, and may even be on the increase in some regions of WA.

History illustrates that where competition for natural resources occurs in an open access environment, there is inevitably a decline in these natural resources (Cartwright, I. 1995). With respect to fishing charters, increased competition for clients will give extra incentive for operators to provide lower cost charters. The concept of cost for some operators and customers may be translated into the number of fish caught or hooked related to the cost of the trip. Clearly, competition for the resource and market share in an over-capitalised and unregulated industry will result in over-exploitation by this sector.

In addition to the growth potential from WA operators, the Working Group also identified the potential of interstate operators to bring charters into WA waters in response to tourism booms. The frequency with which these operators visit WA waters and their impact is unknown.

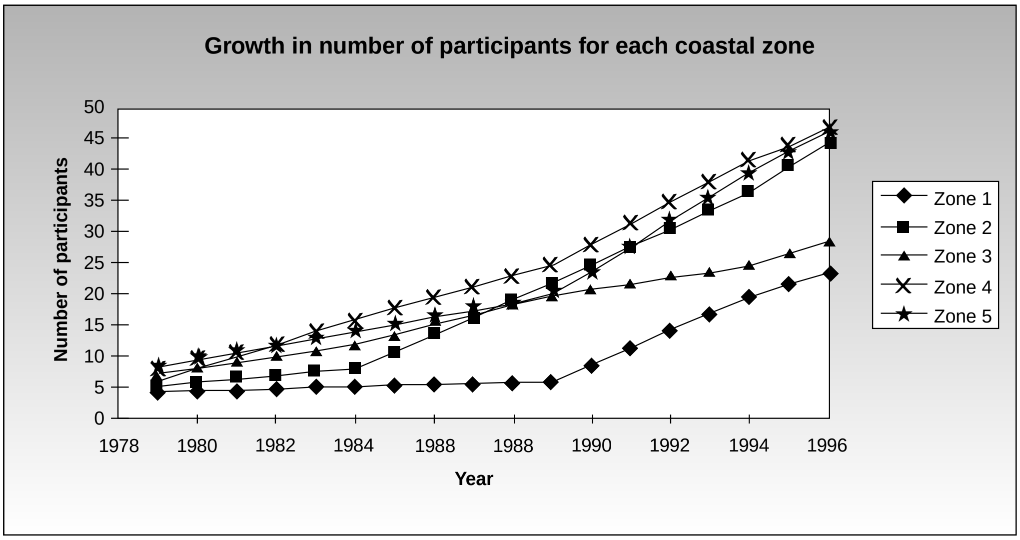


Figure 1: Growth in number of participants within five geographic regions of WA since 1978. (Zone descriptions at Appendix C)

The introduction of a licensing system for aquatic charter operators that fall within the jurisdiction of the FRMA would allow management of the growth of the aquatic charter industry, and ensure long term sustainability of the fish resources the aquatic charter industry depends on.

It is envisaged that aquatic charter operators would initially be issued licenses based on entry criteria which includes previous history in the industry. The Minister for Fisheries announced a benchmark date of 12 September 1997 for consideration of history of investment in the industry. Any investment in the industry after this date is at the operators own risk and future access to the industry is not guaranteed.

The TOFWG has also adopted a precautionary approach in recommending an initial ceiling on the number of licences issued for each region. This is to ensure that growth is controlled until the impact of the aquatic charter industry in each region is determined. Decisions can then be made on the potential for further growth, or the need for further management within each region.

When considering the matter of licensing aquatic charter operators, it was necessary for the Working Group to give serious consideration to the recently published National Competition Policy. The National Competition Policy, contained within the Hilmer Report on anti-competitive legislation, requires all States and Territories to review its legislation to remove anti-competitive laws. The Working Group has endeavoured to form views for the future management of the aquatic charter industry that will be defendable in the light of the necessary legislative reviews.

To introduce a licensing system that has the potential to limit access, where required, to the aquatic charter industry could be seen as introducing anti-competitive legislation. However, the Working Group strongly believes that a legislative framework that can limit access is crucial not only to the future management of the aquatic charter industry, but also to fish stocks and fish habitat in general.

The Working Group considers that the introduction of subsidiary legislation that might be viewed as anti-competitive is justifiable for the following reasons:

- it is necessary to manage the aquatic charter industry as part of a holistic approach to fish resources management;

- without the ability to cap the impact from the aquatic charter industry on living aquatic resources, this sector's operations may be unsustainable;

- it is not equitable to allow the aquatic charter industry to continue to expand to unsustainable levels while the commercial fishing sector has been capped for many years, and in many cases is under going significant effort reductions; and

- there are benefits to the general community in having a managed aquatic charter industry, including:

  a) industry can be part of a living aquatic resource management framework that ensures biological sustainability and provides opportunity for economic viability;

  b) provide access to leisure activities by a quality-based industry; and

  c) economic benefit to the community from tourism through marketing of the aquatic charter industry.

An aquatic charter operator would be a person who provides a fee-for-service charter defined either as a fishing or aquatic ecotourism tour. These two activities are defined by the *Fish Resources Management Act 1994* as follows:

> "aquatic ecotourism" means tourism relating to fish in their natural environment and includes the viewing or feeding of fish but does not include the taking of fish.
>
> "fishing or fishing activity" means -
>
> a) searching for fish;
> b) attempting to take fish;
> c) taking fish; or
> d) engaging in any other activity that can reasonably be expected to result in the taking of fish.

The TOFWG considered that there should be two classes of aquatic charter licence based on the above definitions. The TOFWG believes that any charter which targets fish, including 'catch-and-release' only charters, should be licensed as a fishing charter because they impact directly on fish stocks.

Any scale of fees would be determined by relative impact on fish resources and based on cost recovery principles outlined later in this paper. Therefore, a fishing charter licence would attract a greater fee than an aquatic charter licence. In addition, charter fishing operations which cater for a maximum allowable take should also attract a greater licence fee than those operations which have a less impact on fish stocks, such as catch-and-release. This issue requires further consideration as management for specific areas develops.

These licence definitions do not include aquatic charter operators whose activities fall within the management responsibilities of CALM. Also, there are other sectors of the aquatic charter industry, such as those specialising in transport or hospitality charters, which are outside the jurisdiction of Fisheries WA and CALM. An aquatic charter licence would not be applicable for these activities.

In general, the various Australian States manage fisheries from the shore to 3 nautical miles (nm), while the Commonwealth manages fisheries from 3nm to 200nm. This can be varied by Offshore Constitutional Settlement (OCS) arrangements.

In July 1997 the Ministerial Council on Forestry, Fisheries and Aquaculture agreed, in principle, that day-to-day management responsibility for recreational and charter fishing sectors should lie with the States (Standing Committee on Fisheries and Aquaculture, 1998). The TOFWG supports this position. In addition, the TOFWG believes funding for the responsibility of managing these stocks should be devolved to the States.

Recommendations

6. *That a new licence category under the Fish Resources Management Act 1994 (FRMA) be introduced to licence aquatic charter operators that fall within the jurisdiction of the FRMA.*

7. *That Fisheries WA and CALM develop a Memorandum of Understanding to ensure that existing licensing arrangements administered by CALM and the aquatic charter licence proposed in this paper are managed in a coordinated and cooperative manner to ensure protection of environmental and other resource values and sustainability of aquatic charter operator opportunities.*

8. *a) If the number of licences in a particular area needs to be limited for resource management reasons, then a history of investment in the aquatic charter industry prior to 12 September 1997 will be part of the selection criteria for access determination.*

   b) Any further investment after that date is at the operator's own risk as there will be no guarantee of success.

   c) Until the relative impact of the aquatic charter industry on fish resources can be determined, as a precautionary measure, a ceiling for the number of operators in each region should be established.

   d) A working group involving the aquatic charter industry and the Recreational Fishing Advisory Committee (RFAC) should be established immediately to determine, in consultation with CALM and Fisheries WA, what the number of operators should be in each region.

9. *a) That there be two classes of aquatic charter licence:*

1) aquatic ecotourism; and

2) fishing tours and aquatic ecotourism.

"Aquatic ecotourism" means a commercial fee-for-service operation which provides services relating to fish in their natural environment and includes the viewing or feeding of fish but does not include the taking of fish.

"Fishing tours" is defined as a commercial fee-for-service operation which provides services relating to the take, capture or catching of fish.

9. *b) Any scale of fees for licenses should reflect the potential impact on the resources.*

10. *The Offshore Constitutional Settlement (OCS) needs to be adjusted to ensure management of recreational and charter fishing for all species is vested in the State and associated management costs should be met through Federal funding.*

11. *Non-fishing charter activities within marine parks and charter activities subject to management under the Wildlife Conservation Act 1950 and CALM Act 1984 and other zonal access should be treated separately, and managed under existing arrangements. Further development of management for zonal access to be subject to consultation with the aquatic charter industry and be consistent with regional fisheries management plans for recreational fishing and marine conservation areas.*

12. *Fees should be set according to cost-recovery principles, and initially based on the cost of management recommendations detailed later in this paper.*

3.2.3 Excess capacity in industry

Under current access arrangements there is a large amount of latent (unused) fishing capacity within the aquatic charter industry, which becomes most apparent during peak tourist seasons. The mobilisation of this unused capacity, or latent effort, can drastically increase competition for the available fish resources, and as a result, increase the likelihood of over-exploitation of fish resources or affect the quality of the tourism experience available.

If large amounts of latent effort are allowed to remain within the aquatic charter industry, the effectiveness of individual catch controls as a management measure will be seriously compromised.

As there is very little data available to Fisheries WA on the activity of aquatic charter operators, it is likely that the introduction of a licensing system will not eradicate all the latent effort that exists. Therefore the implementation of a performance criteria on licensed operators, where there is a likelihood of over-exploitation, is seen as essential. Such a mechanism will help determine a real level of effort and remove those operators who are not committed to the industry.

Recommendation

13. *That, where there is a likelihood of over-exploitation of fish resources or unacceptable impact on the quality of the tourism experience, minimum performance criteria should be developed for continuing eligibility for aquatic charter licences.*

3.2.4 Dual licensing and risk of escalating effort

Aquatic charter operators are not currently required to hold a licence from Fisheries WA to operate in Western Australian waters.

However, some operators have a commercial fishing boat licence (FBL) which entitles them to fish in the Open West Coast Scalefish Fishery. Additionally, some aquatic charter operators also hold other authorisations (e.g. managed fishery licences) that entitle them to operate in specified managed commercial fisheries.

The catch taken by recreational fishers who use the services of charter operators is managed by recreational fishing regulations. Increasingly, this includes regionalised management arrangements (e.g. Ningaloo Marine Park). Commercial fishermen are not bound by recreational bag limits and where a person is both a commercial fishermen and charter operator it is very difficult to enforce recreational bag limits. This creates a loophole for unscrupulous charter operators who hold a FBL to circumvent both recreational and commercial fishing laws.

Recommendations

14. *That a commercial fishing trip and a charter fishing trip cannot be conducted at the same time.*

15. *Operators who hold both a commercial fishing licence and an aquatic charter fishing licence should be required to clearly nominate the nature of their fishing trip to a Fisheries WA office before leaving port.*

16. *Any fish caught on a charter trip should be taken under recreational or charter fishing regulations, and are not saleable.*

17. *That any authorisation associated with fishing boat licences allowing the sale of recreationally caught fish be removed from aquatic charter fishing vessels.*

3.2.5 Lack of integration with management of other sectors

It is imperative that the total impact on a fish stock and its habitat are taken into account when management proposals are developed. The charter fishing industry cannot be managed in isolation from other user groups, ie. recreational fishing and commercial fishing.

The integration of the charter industry with other user groups requires allocation within a defined framework, such as a 'total allowable catch' (TAC) system, or nominal catch sharing through the use of other mechanisms. Realistically, the most appropriate mechanism presently available is for a nominal sharing of the fish resources through the application of input controls. For the charter fishing industry this means appropriate bag and size limits, which take into account the greater fishing capacity that charter operators provide their clients.

For the purpose of recreational fisheries management, Western Australia has been divided up into five zones - Kimberley, Pilbara, Gascoyne, lower west coast and south coast. A regional review of recreational fisheries management is currently being undertaken on a region-by-region basis. These same zones have been recommended for the aquatic charter industry (Recommendation 21). These zones can be used as management units to assist in the allocation of fish resources between the recreational fishing, commercial fishing and aquatic charter industry sectors.

Recommendation

18. *That the charter fishing industry be included in an integrated approach to fish resource management and that in any review of the commercial wetline fishery, the recreational charter industry fishing zones be considered as a basis for resource sharing.*

3.2.6 Unknown catch and unknown impact on resource

There are a range of activities provided by aquatic charter operators, and these can be classed as either non-consumptive (sightseeing, snorkelling, diving and wildlife interaction) or consumptive (line fishing and spearfishing). All of these activities will have some impact on the environment, but consumptive activities will have the greatest impact on fish resources.

As explained previously, the aquatic charter industry is one of three primary aquatic resource user groups. However, only limited historic data through the Fisheries WA catch and effort database is available to determine the relative impact of the aquatic charter industry on fish resources.

The Working Group believes that an essential requirement of any licensing arrangement is that licensees be required to fill out and submit a periodic log book which details activities, catches and other relevant management information. The need for a systematic data collection system has been reinforced through comments provided by other Australian State Governments that have attempted to manage the charter industry.

Periodic log books for all chartered trips (consumptive and non-consumptive) are required so that all activities in which charter vessels are involved can be monitored. For all trips, the date, departure time, location(s) visited, primary activity and return time need to be recorded. For trips that include fishing, additional information would be required, such as:

- *time spent fishing;*
- *number of persons fishing;*
- *gear used;*
- *the number of fish kept and released for each species; and*
- *length and sex details for each fish.*

In conjunction with commercial and recreational catch data, these records would enable management to identify zones of potential over-exploitation, relative exploitation rates and indices of the age structure and abundance of fish populations.

Recommendations

19. That all licensed aquatic charter operators be required, as a condition of licence, to submit a periodic and detailed research log book to Fisheries WA or Department of Conservation and Land Management as appropriate.

20. An integrated database and collection system for aquatic charter operators be developed to provide Fisheries WA with more detailed information on catch, effort and fish population structure.

3.2.7 Localised stock depletion

Escalating fishing pressure in waters near major regional centres is likely to cause localised depletion of specific fish stocks, particularly for demersal species and large size classes of fish.

In heavily fished populations the proportion of large fish available tends to diminish, as does the stock density. Under exploitation levels which approach maximum sustainable yield (MSY) the stock may be sustainable, but the perceived quality of the recreational fishing experience diminishes. While this may not always represent a threat to the sustainability of the stock as a whole, it does represent a threat to the available fishing quality in proximity to regional tourism centres.

Anecdotal evidence from aquatic charter operators and recreational fishers suggests that this is already occurring in many key areas, particularly among demersal and semi-resident fish such as dhufish, gropers, cods, snappers, emperors and coral trout. This trend has been exacerbated in recent years by the wider availability and use of fish-finding technology, such as global positioning systems and colour echo sounders. Such equipment is now used by the vast majority of charter operators and commercial fishers, and by many recreational fishers.

Fishers from all three primary user groups frequently rely on known physical bottom features, such as 'lumps' and 'drop-offs', to target areas of known productivity where fish tend to aggregate. Charter operators do so to ensure that customers catch fish. Where such features are fish aggregation areas, operators may gain a false indication of resource abundance when only considering catch rates.

Some aquatic charter operators claim to 'farm' their known fishing spots by encouraging limited catches per trip at each location. A key to the success of this stewardship practice is a relatively low level of competition for these areas from other operators or recreational and commercial fishing boats, and a low exploitation rate.

As described in 3.2.5, the proposed recreational fisheries management regions (Kimberley, Pilbara, Gascoyne, lower west coast and south coast) are recommended for the aquatic charter industry. The TOFWG recommends as a precautionary measure that access to each zone is limited, to ensure the sustainability of fish stocks in these areas.

Recommendations

21. *That the Western Australian coast be divided into five zones of operation, consistent with regional recreational fisheries management strategies, and that access for charter operators will be allocated according to appropriate management objectives or natural resource carrying capacity.*

22. *In assessing applications, the charter and other fishing effort that exists within the area, and whether the area can sustain additional pressure, will be taken into consideration.*

23. *That applications must include a business plan explicitly detailing the proposed operation.*

24. *That access to the zones be determined by demonstrated history of commitment to the industry or predetermined selection criteria.*

25. *That assessment of applications would follow a process approved by the Minister for Fisheries. Applications should be considered by a committee especially established for assessment purposes. The aquatic charter industry should be represented by a sub-committee and that the process be formulated in a 'whole of Government' approach. Provision should be made for an appeal process.*

3.2.8 Fish Conservation and Management Tools

Fish with gas-diffusion air bladder systems are not able to adapt rapidly to extreme changes in external water pressure. Many demersal fish caught from boats have these air bladder systems, and evidence is growing that there is likely to be a very low survival rate among fish caught in deep water and returned.

Work conducted through the Fremantle TAFE Maritime Centre has shown that large dhufish suffer serious, and often fatal, internal damage from the rapid expansion of gas in their swim bladder and internal organs caused by being drawn rapidly up to the surface from deep water.

While smaller fish appear to survive better, a precautionary approach to management of these fish stocks should assume that close to 100 per cent mortality rate is likely in these fish caught in water depths greater than 20 metres.

The setting of fishing controls on demersal species such as bag and size limits needs to take these factors into account, and the promotion of 'catch-and-release' as a conservation measure for some species should be approached with caution.

Recommendations 26, 27 and 28 are conditional upon these issues being dealt with during the establishment of regional recreational fishing management plans. These plans will be developed in consultation with the recreational fishing community and other recreational fishing stakeholders.

Recommendations

26. *Bag limits for charter clients should be adjusted to assume a 100 per cent mortality on demersal fish caught in waters greater than 20 metres in depth.*

27. *Consideration should be given to the introduction of controls pertaining to the catch and release of fish, particularly on ultra light line class. This issue should be dealt with during the establishment of regional recreational fishing management plans.*

28. *The effectiveness of legal sizes for identified species should be reviewed by regional planning groups, and alternative stock conservation strategies developed where practical.*

28 a. *Consideration should be given to the prohibiting of the taking of finfish, crustacea and molluscs using underwater breathing apparatus.*

(Recommendations 26, 27 and 28 are conditional upon these issues being dealt with during the establishment of regional recreational fishing management plans).

4.0 ECONOMIC ISSUES

4.1 OBJECTIVES

- *Optimise overall and regional economic benefits to the community from the use of fish and fish habitats by the aquatic charter industry.*

4.2 CURRENT ISSUES AND RECOMMENDATIONS

4.2.1 Level of potential effort is too great for operator viability

During Working Group deliberations, concern was frequently expressed that the number of aquatic charter operators is too large - particularly in peak seasons or tourism draw-card areas. Specifically, there are two negative economic effects that result from too many operators, and both are a direct result of open access:

1. *The ability for people to run part-time operations often results in poor standard charters being conducted - the clients take this bad experience with them and have a bad impression of the industry in general.*

2. *The ability for people to run part-time operations that target peak seasons may also result in loss of clients and income to those operators who have a greater commitment to the industry.*

The Working Group was advised that the majority of business is obtained at the point of sale, not through pre-bookings, which exacerbates the competition and hence negative impact of a large number of operators on individual economic viability.

Many part-time operators are commercial fishermen who take advantage of peak tourist seasons. The Working Group acknowledged that off-season commercial fishermen may have a cost advantage over charter operators who do not hold a WA Fishing Boat Licence. Specifically these advantages include:

1. *lower capital investment required to participate as a charter operator;*

2. *ability to misuse primary industry diesel fuel rebate; and*

3. *dock side promotion of charters.*

4.2.2 Mobility of fleet

A mobile operator is an operator who runs charters in more than one of the 10 regions identified in the questionnaire distributed to charter operators (Appendix B and C).

The size of WA means that seasonal, climatic and environmental conditions differ significantly between regions. Consequently, tourism opportunities and prevailing weather conditions mean that the number of prospective clients for charter operators may be very low at certain times of year in each region. As a result, many operators who wish to operate year round will move to other parts of the State where operating conditions are more favourable.

Figure 2 illustrates the seasonal variations in operations that occur for the five different coastal zones (Appendix C). The peaks in activity are directly associated with peak tourism seasons and conditions. The movement of effort by mobile operators is evident; for example, note that a peak in zone 5 (Broome to WA/NT border) is associated with a trough in zone 2 (Perth metropolitan), inferring that a number of charter operators leave the Perth metropolitan area in the winter months and re-locate in the north west.

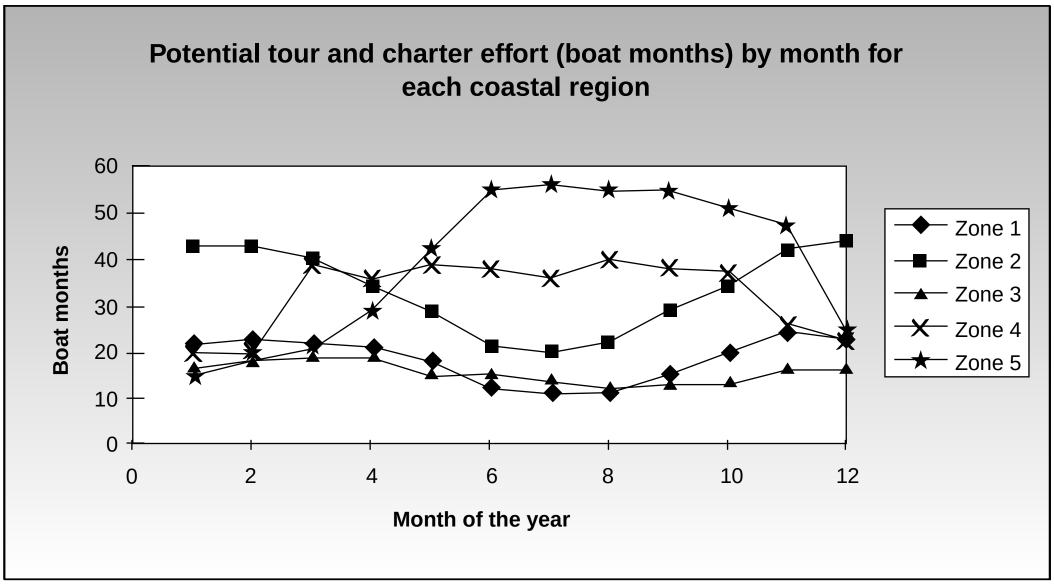


Figure 2: Seasonal charter effort by month and region in WA. (Zone descriptions at Appendix C)

Data contained within Table 1 was extracted from responses to the questionnaire and illustrates the number of operators per region and the number of mobile operators.

Zone	Region nominated by respondent	Number of nominated operators	Number of mobile operators	% of operators mobile
1	Esperance	6	5	83
	Albany	7	1	14
	Augusta–Bunbury	12	6	50
2	Metropolitan	46	23	50
3	Lancelin–Greenhead	13	6	46
	Dongara–Geraldton	18	12	67
4	Denham–Carnarvon	22	10	45
	Exmouth–Port Hedland	29	18	62
5	Broome–Derby	33	20	61
	Derby–Wyndham	13	11	85

Table 1: Numbers of charter operators and mobile charter operators by region.

The high proportion of mobile operators indicates that mobility is a necessary practice for many full-time operators to remain viable, particularly those who operate from Zones 1 and 2. However, operators who are locally based and do not travel may resent the presence of more mobile operators in their region.

Local operators may question the commitment of these mobile operators to conservation of local fish stocks and their ability to provide the standard of tour that a local operator can offer, due to local knowledge. This resentment is almost certainly a result of increased competition and potential loss of business in peak tourism seasons.

4.2.3 Justification for licensing on a regional basis

As the charter industry develops, it is likely that access to some areas and activities may need to be limited to ensure sustainability of the resource; sustainability of a quality experience for clients; and the development of a viable professional industry with high standards of customer service.

In addition, as explained in the previous chapter, the aquatic charter operator's fleet is highly mobile, and tends to target tourism 'hot spots' to maximise its customer base. This may result in intense competition for both clients, areas of operation, and available fish resources.

It is critical for both the sustainability of the resource and the viability of the industry that this 'gold rush' scenario be managed.

4.2.4 Access fees and cost recovery

Any limitation of access will provide direct benefit to individual operators who qualify for access.

The cost of management required for orderly development of the industry, over and above the costs currently incurred by Government for the management of recreational fishing and sustainability of the resource, should be born by the beneficiaries of management, in keeping with cost-recovery and 'user pays' principles established for managed commercial fisheries and licensed recreational fisheries.

Key areas that require resourcing include:

- *research into charter catches and establishment of a database on activities;*
- *development and evaluation of management;*
- *monitoring of industry regulations; and*
- *consultation with industry.*

Other areas of interest to the industry which require resourcing include the establishment of service standards, industry training and promotion.

4.2.5 Management costs

The key recommendations in this report propose establishment of a management plan, a research and monitoring database, a licensing system and a industry consultation process.

The establishment and recurrent running costs for these activities are likely to be in the order of $360,000 pa. A summary of some of the management costs is given below.

1. *Develop and review management arrangements, including implementation of licensing legislation and system - $75,000. These arrangements include:*

    - *design licensing framework;*
    - *consult with industry;*
    - *amend FRMA and regulations; and*
    - *set up licensing database and system.*

2. *Develop survey methodology, data collection system and database - $25,000*

3. *Industry Peak Body - $110,000 (Executive and secretarial support)*

4. *Additional costs are likely to be incurred in monitoring compliance. These costs need to be included in the operational program for recreational fisheries management in the order of $150,000 per year.*

A staged implementation of management costs will allow industry time to adjust to cost recovery. This approach has been taken in the introduction of cost recovery to commercial fisheries. Staged implementation will also allow time for the real cost of management to be determined.

Under cost recovery, industry will have the opportunity to provide input into the allocation of funds for management. TOFWG has taken the opportunity to be pro-active in setting initial priorities for funding prior to industry input.

Recommendations

29. *That the cost of management and consultation be borne by those licensed in the industry and consideration be given to a staged implementation of this policy in consultation with the industry.*

30. *Access fees should be charged in proportion to the level and type of use.*

31. *The allocation of access should meet with the principles of the National Competition Policy (Hilmer), and allow for rational business planning and provide a basis for investment confidence on the part of operators. The industry strongly recommends that licence holders be able to benefit from any goodwill value of the business associated with the transfer of licence, provided that the continuation of the licence does not adversely impact on the sustainability of the resource.*

32. *That revenue from charter licence fees be directed into a trust fund for the management and future development of the aquatic charter industry. Priority funding should be allocated to:*

    - *implementation of recommendations in this report;*
    - *establishment of a research program;*
    - *establishment of a peak body; and*
    - *ongoing management review.*

5.0 ENVIRONMENTAL ISSUES

5.1 OBJECTIVES

- *To ensure environmental impacts from aquatic charter operators meet acceptable standards.*

5.2 CURRENT ISSUES AND RECOMMENDATIONS

5.2.1 Number of participants in limited areas

Clearly the greater the number of operators in a given area, the greater will be the impact upon the environment. This impact will result from the activities undertaken and simply by the presence of people. Specifically, the environment will be negatively impacted upon by:

- *rubbish;*
- *sewerage;*
- *habitat damage (water and land) - anchors, tracks, camps, exhaust fumes, fuel and oil; and*
- *feeding of wildlife.*

Recommendations

33. *Access arrangements should consider conservation, tourism and environmental impacts on fish, fish habitat and other resources.*

34. *That the aquatic charter industry develop codes of conduct to encourage conservation oriented fishing practices and environmental friendly operating standards.*

35. *That the aquatic charter industry encourage the development of industry associations to pursue the above recommendations.*

6.0 SOCIAL ISSUES

6.1 OBJECTIVES

- *To provide access to a diverse range of experiences that would not otherwise be available to the community.*

6.2 CURRENT ISSUES AND RECOMMENDATIONS

6.2.1 Infrastructure

This issue relates both to the current lack of infrastructure (such as airports, boat ramps and access tracks) in some areas and the planned supply of additional infrastructure. In remote parts of WA, the lack of infrastructure is an obstacle to charter operators providing the level of service that operators in well-established areas are more easily able to provide.

Additionally, remoteness of situation makes it difficult for clients to reach the area to utilise the services of charter operators. In summary, this lack of infrastructure can be seen to limit the ability of the aquatic charter industry in remote regions to expand, and in general it would seem beneficial for the industry to have a better infrastructure.

However, some operators have established themselves in areas with relatively low infrastructure support. These pioneering operators now believe that as infrastructure is developed in the remote parts of WA, there will be further encouragement for mobile operators to offer their charter services in these traditionally remote areas.

The Working Group has noted that infrastructure, in terms of its development, will have an impact on the aquatic charter industry.

6.2.2 Industry image

Numerous concerns have been expressed from both within and outside of the Working Group regarding the ability of some operators to tarnish the industry's image by providing a poor standard of service. The Working Group does not believe that service standards are appropriately dealt with by formal legislation. Rather, that the development of codes of conduct are the most effective way of encouraging operators to have a client focus and provide a level of service that customers expect.

Recommendations

36. *That the establishment of industry associations be encouraged and that these associations develop a code of conduct that will enable industry to market its services based on the provision of a quality, association-endorsed charter operation. The peak industry associations should develop a relevant accreditation and training program in consultation with appropriate training bodies.*

37. *That good safety practices be incorporated into a code of conduct.*

38. *That there be, as a requirement of licensing, a minimum public liability insurance held by the operator.*

6.2.3 Management advice - representative structure

Aquatic charter operators are not a defined group in the fisheries consultative structure in Western Australia, although they are represented through various industry associations. A key question is whether the level of involvement that aquatic charter operators have in the development of management proposals should be increased, in line with the growth in the industry. This could be achieved through a variety of mechanisms, such as the establishment of a peak industry association and/or a Management Advisory Committee, through to more formal recognition of the current advisory structure, or a combination of these mechanisms.

A fully functional industry association would provide a mechanism to address many of the issues raised elsewhere in this document with regards to industry performance and quality assurance. More formal recognition of the aquatic charter industry on the Recreational Fishing Advisory Committee (RFAC), Regional Recreational Fishing Advisory Committees (RRFACs) and the Western Australian Fishing Industry Council (WAFIC) may also be appropriate to assist the development of more integrated management.

Recommendations

39. *That the aquatic charter industry be encouraged to form a peak industry association.*

40. *That the peak aquatic charter industry association be given recognition on the Recreational Fishing Advisory Committee (RFAC) in the same manner as the Western Australian Recreational and Sportfishing Association. This will require an amendment to the FRMA.*

41. *That, where appropriate, the aquatic charter industry be represented on other management advisory committees and marine reserves planning groups, marine parks advisory authority and other Government working groups as applicable.*

7.0 REFERENCES

Cartwright, I. (1995). Management of Living Marine Resources *In:* Hotta, K. & Dutton, I.M. (Eds) (1995) *Coastal Management in the Asia-Pacific Region: Issues and Approaches* pp 57-66

Government of Western Australia (1994*) New Horizons in Marine Management*

Government of Western Australia *(1995) A Nature Based Tourism Strategy for Western Australia*. Perth: Western Australian Tourism Commission : Dept. of Conservation and Land Management.

Magee A.E. & Prokop F.B. (1993) *Proceedings of the charter boat management workshop*, Fisheries Management Paper No. 59. Fisheries Department of Western Australia.

Millington P. (1990) *Future policy for charter fishing operations in Western Australia*, Fisheries Management Paper No. 35. Fisheries Department of Western Australia.

Standing Committee on Fisheries and Aquaculture (1998) *Management of Recreational and Charter Fishing for Tuna and Billfish - National Cooperative Arrangements*. Canberra: Department of Primary Industries and Energy.

APPENDICES

Appendix A
Profile of Australian charter industry

There are well established aquatic charter industries in all states of Australia and the evolution of management arrangements in each state differs. A summary of current management arrangements around Australia is contained within Table 1.

State	*Charter Fishing Licensing*	*Catch Reporting System*	*Dual commercial & charter operations*
Tasmania	Provision for licensing in Act but not yet implemented	Voluntary log book system	Dual licensing in existence but subject to review
Victoria	Proposed licensing under recreational fishing licence provisions of new Act	Mandatory log book system proposed	Dual licensing recognised as a problem
South Australia	Licensing proposed	Mandatory log book system proposed	Dual licensing recognised as a problem, management plan under preparation.
Queensland	Mandatory licensing	Mandatory log book system in place	Commercial fishers must suspend commercial entitlements while on charter
New South Wales	Mandatory licensing system proposed	Voluntary log book system in place	Dual licensing recognised as a problem
Northern Territory	Mandatory licensing system in place	Mandatory daily catch system in place	Commercial fishers must suspend commercial entitlements while on charter

Table 1: Current management arrangements for the management of the aquatic charter industry by State and Territory.

From Table 1 it can be seen that only the Northern Territory and Queensland have licensing requirements for charter fishing operations, with an accompanying compulsory licensing and logbook system.

QUEENSLAND

In Queensland a ‘commercial fishing tour’ is defined as:

> *‘a tour or fishing trip, conducted in trade or commerce, for taking fish other than for trade or commerce and carrying passengers for gain.’*

The *Fisheries Regulations 1995* came into force on 1 December 1995, and these regulations introduced new arrangements for commercial fishing tours requiring them to hold a permit. There are three separate permit conditions which may apply and they are defined by the activity and the area in which the activity is undertaken. They are:

1. offshore or reef water tours;
2. inshore tidal water tours; and
3. non-tidal water tours.

Permits are issued by the Queensland Fisheries Management Authority (QFMA) and are current for a period of two years. It is a condition of permit that log books be completed. These permits remain non-transferable and cannot be renewed.

NORTHERN TERRITORY

Mandatory licensing system in place for charter fishing operations. There is an associated fee and requirement to submit a mandatory log book.

SOUTH AUSTRALIA

Although SA does not currently require operators within the charter boat industry to be licensed, the Department of Primary Industries Fisheries SA has released a draft discussion paper entitled *Management of the Charter Boat Fishery in South Australia*. In this Discussion Paper four options are presented and considered - these options are summarised below:

1. Requirement to hold a commercial fishing licence

It is a requirement for those wishing to engage in charter boat operations and claim an exemption from bag/boat limits to be a holder of a commercial fishing licence.The charter boat licence would be limited to the permitted gear and species endorsed on the commercial fishing licence. The number of paying passengers would be restricted by a Department of Transport survey certificate. Operators would be required to submit monthly statistical returns. However, there would be no limit on the number of fish permitted (except Razor Fish) which could be taken and the catch could be sold.

2. Establishment of a separate charter operation licensing scheme

In this case, any person wishing to operate within the charter industry and claim exemption from bag/boat limits would be required to apply for a separate charter boat licence. Under this scheme, a limited number of non-transferable licences would be issued.

Each boat would be restricted to a daily limit equal to the bag limit of 20 paying customers. Where there were less than 20 paying customers present, individual bag limits apply.

The only gear allowed on a charter trip would be that allowed for recreational fishing. It would be mandatory for operators to complete a charter boat catch return on a daily basis and any fish caught could not be sold.

3. Establishment of a separate charter boat licence with limited access to existing charter operators and marine scalefish licence holders only

Initial access to charter boat licences would be restricted to current marine scalefish licence holders and those who have proven prior involvement and commitment to the charter industry. Future access to charter boat licences would be subject to an individual purchasing such a licence.

Marine scalefish licence holders would be granted a two year transition period during which they would be allowed to operate as dual marine scalefish/charter boat operators.

Charter boat operators would be exempt from daily boat limits. However, individual recreational bag limits would apply. The same conditions would apply as in option 2 above with respect to:

- allowable gear,
- sale of catch, and
- completion of daily catch records

4. Maintain existing arrangements

Currently in SA, both recreational fishers and holders of commercial fishing licences may operate charters. Recreational fishers are restricted according to bag/boat limits and the survey certificate issued by the Department of Transport. However, it is possible to apply for Ministerial exemptions to catch limits. Neither the operator nor the passengers are permitted to sell the catch.

Holders of commercial licences operating charters may utilise all gear and may take all species endorsed on their licence. It is permissible to all of the catch taken to be sold.

NEW SOUTH WALES

In NSW, the only requirement to operate a fishing boat charter is compliance with MSB Waterways Authority standards. In this State, particular concern has been raised about the practice of licensed commercial fishing boats operating as recreational charters and selling their catches. This is seen as a means by which commercial fishers are able to circumvent fisheries management regulations.

Although NSW Fisheries has made contact with a number of charter boat operators and encouraged them to provide catch and effort data, this has been unsuccessful, with only two out of 40 operators who agreed to provide such information having done so on a regular basis. It is the opinion of NSW Fisheries that a mandatory licensing system, incorporating reporting requirements, represents the most effective mechanism for future control of excessive fishing effort.

VICTORIA AND TASMANIA

Victoria and Tasmania are not proposing action to progress the management of their respective charter industries in the short term.

APPENDIX B
The WA Tour Operators Fishing Working Group Future Management Questionnaire

1) Please specify the type of tour you provide:

Operate from boat	
Operate from vehicle (e.g., 4WD)	
Operate from boat and vehicle	

2) Please list your vessel specifications and survey details:

length overall ....

passenger capacity ....

date of last survey...

specialised equipment *(e.g., fish holding facilities, GPS, sounder, game chair, 4WD, etc)*
....
....
....
....
....
....
....
....

3) Please list licences or permits currently held *(e.g., SPV, FBL, Managed Limited entry Fishery Licences, Licence conditions, CALM permits, etc)*
....
....
....
....
....
....
....

4) Are you a member of a State or national tourism association? Yes No

If yes, please specify association(s):
....
....
....

4a) Please indicate in the following table your history of operation:

Period of Operation	Please Tick
0-12 months	
1–5 years	
5–10 years	
10–15 years	
> 15 years	

5) Area of operation. Please indicate in the table below the area you typically operate on a year-by-year basis:

Region for Operation Base	Seasons Operated *(e.g., June–Sept)*	No. Months Operated *(e.g., 3.5 months)*
Esperance		
Albany		
Augusta - Bunbury		
Perth Metropolitan (Mandurah - Two Rocks)		
Lancelin - Greenhead		
Dongara - Geraldton (inc Abrolhos Is.)		
Denham - Carnarvon		
Exmouth - Port Hedland		
Broome - Derby		
Derby - Wyndham		

6) Do you operate in Marine Reserves? Please indicate in the table below which one:

Marine Reserve	Tick if you Operate
Rowley Shoals Marine Park	
Ningaloo Marine Park	
Shark Bay Marine Park	
Hamelin Bay Marine Nature Reserve	
Marmion Marine Park	
Shoal Water Island Marine Park	
Swan Estuary Marine Park	

7) How would you describe the service you provide? Please indicate in the table below which best describes your operation:

Type of Operation	On-board Tours	Dive Tours
Purely target recreational bag limits of fish		
Target some fish and observe natural attractions		
Purely observe natural attractions		

If you do not feel that any of the categories in the previous table adequately describe your operation, or wish to add further comment, please do so below:

....
....
....
....
....

8) Do you actively promote your tour operations? Yes No

If yes, please indicate the mediums you use to promote your tours:

Advertising Medium	Indicate where appropriate
Newspaper	
Magazines	
Tourism commission	
Tourist centres	

If other mediums are used, please specify:

....
....
....
....

9) Please complete the following table, indicating the origin of your clients.

Origin	Percentage
WA	
Interstate	
Overseas	

10) Have your clients indicated the type of tour they prefer? Yes No

If yes, please indicate their preference in the table below:

Service Preference	Preference (per cent)
Purely target recreational bag limits of fish	
Target some fish and observe natural attractions	
Purely observe natural attractions	
Other	

11) How many crew do you have aboard your boat? *0 1 2–3 3–4 > 5*

12) Have you or your crew had hospitality or other training that is relevant to your tour operation? *e.g. hospitality, scientific, recreational, maritime, etc.*
If yes, please specify qualifications:

....
....
....
....
....
....
....

13) If available, would you or your crew be interested in participating in ongoing training? Yes No

14) Which topics would you like included in training sessions?

Topic	Tick if appropriate
Species identification	
Site identification (dive and fishing)	
Maritime safety	
Ecology	
Management	
Tourism	

Please specify any other topics you believe appropriate:

....
....
....
....
....

15) This section is for you to add any comments relating to issues or problems within the tour/charter industry in WA:

....
....
....
....
....
....
....
....
....
....

This is an anonymous survey and information provided will not be divulged outside the Fisheries Department or the Working Group.

If you wish, please fill out your name, address and contact phone number:

....
....
....

Thank you for your cooperation.

Appendix C
Results from Analysis of the Questionnaire

DESCRIPTION OF COASTAL ZONES

Zone 1: WA-SA border to Bunbury

- Operators tend not to specialise due to inability to attract large numbers of clients.

- *Whale watching* - peak activity from July to October in southern part of zone with an increasing interest further north.

- *Fishing and diving* - peak activity from December to February; diving continues through to June dependent on weather conditions. In northern part of zone. activities are mostly shore-based and consumptive, while there is a mix of consumptive and non-consumptive activity in the south.

- Anticipated that increased facilities will result in increased clientele.

Zone 2: Perth metropolitan

- *Season* - November to March (due to weather).

- *Diving* - large amount of activity all year round, peaking December to April.

- *Whale watching* - September-November.

- *Fishing* - includes variety of activity: bottom fishing; game fishing; and sport fishing - much of the activity is near the FADs.

Zone 3: Lancelin to Geraldton

- Operators are highly mobile.

- Bottom fishing is the main activity.

- Diving tours are predominantly consumptive and constitute a significant component of local industry.

- Fleet includes carrier boats - able to operate very cheaply (Geraldton).

- High proportion of dual licensed operators.

Zone 4: Denham to Port Hedland

Shark Bay–Carnarvon

- Limited charter boat industry.
- *Ecotourism* - dive trips, often tied in with resorts.
- *Bottom fishing* - centred around the targeting of pink snapper from May to August.
- *General comments* - tours are predominantly day trips; there are extended trips Monday to Friday, May to October in Shark Bay area, and April to May from Denham. There have been a number of complaints about the industry - standard of service not satisfactory. In addition, there is a large number of operators out of Denham - a large proportion with LFB.

Exmouth

- *Diving* - all year round with the peak season from February to October. Most tours are non-consumptive day trips with increasing potential for package tours and diver training to be incorporated. Dive charters do also run bottom fishing charters from time to time.
- *Whale sharks* - predominantly February to May.
- *Whale watching* - two seasons on the north and south migrations, ie. April/May and Sept/October respectively.
- *Manta ray watching* - a year-round activity.
- *Bottom fishing* - year round activity, which peaks during winter months due to weather. Includes day and extended trips - extended trips are up to 5 days cruising to the Muirron Islands & Montebello Is. The majority of tours are day trips.
- *Sport and game fishing* - year round activity, with peak season August to January (water temperature dependent). It is generally considered that there is huge potential for growth in this area.

Port Hedland

- *Dive tours* - Seasonality and weather dependant, most activity from July to November.
- *Whale watching* - seasonality dependent on migrating whales.
- *General comment* - significant number of dual licensed operators (ie. hold FBLs) operating as charter boats from April to October. There is also a void of knowledge with respect to information on the Dampier Archipelago.

Zone 5: Eighty Mile Beach to WA/NT border

- *Day bottom fishing* - this is a year round activity that peaks from May to September. Charters are mostly inshore and the clients are after a take-home catch.

- *Day game fishing* - chasing highly prized billfish and tunas. The season is April to September peaking in May to July. Such activity is predominantly release fishing.

- *Day sport f ishing* - this is a year round activity that peaks April to September. Sport fishing targets a greater species range than game fishing - for example, barramundi fishing on the Ord River. Sport fishing is a mix of release and retain fishing.

- *Fly fishing* - year round activity for a variety of species including sailfish.

- *Tour guide camps* - year round activity with a peak of season from March to May targeting barramundi to coincide with dry season. Predominantly, release fishing is practised.

- *Extended fishing trips* - live aboard tours encompassing a range of activities between Broome and Wyndham. Some fish caught are consumed during the trip, and fish in excess of these requirements are released.

- *Dive tours* - extended trips, predominantly to the Rowley Shoals, may catch some fish to consume while on charter. Seasonally and weather dependant, most activity from July to November. Recent development of "deep blue diving" where free divers target pelagics with spears.

- *Whale watching* - based in Broome, and peak in activity is between June and August. This sector of the Kimberley charter industry is thought to have scope for increase.

- *4WD and dinghy safaris* - only possible during the dry season and fishing is predominantly for barramundi and sooty grunters.

GROWTH OF INDUSTRY

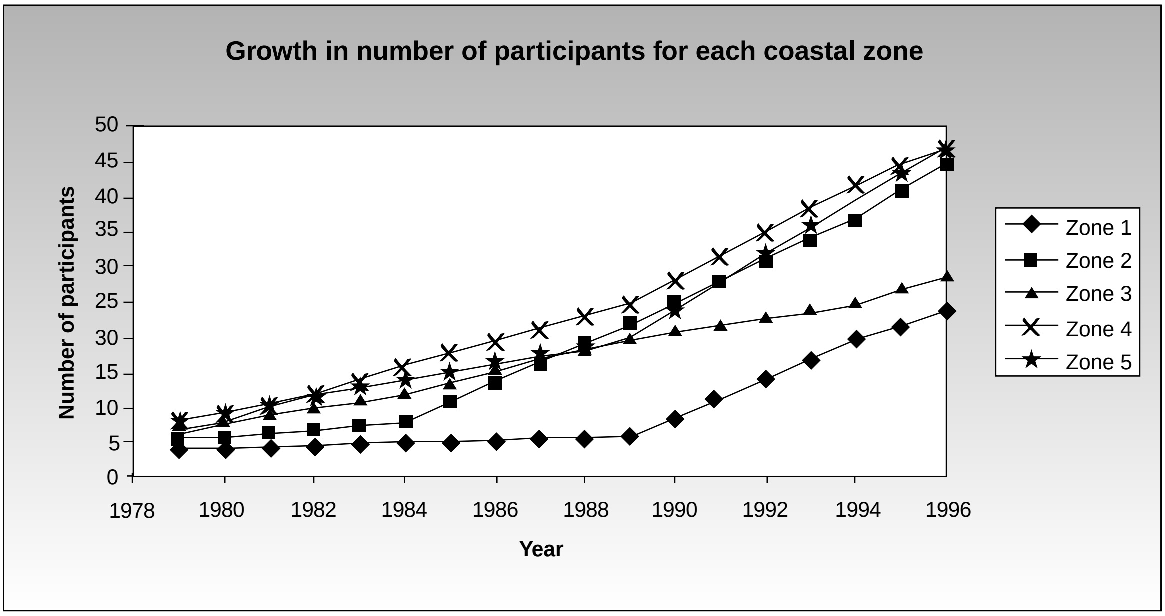


Figure C1: Growth in number of participants for each Coastal Zone from late 1970s to late 1990s. (data gathered from questionaire)

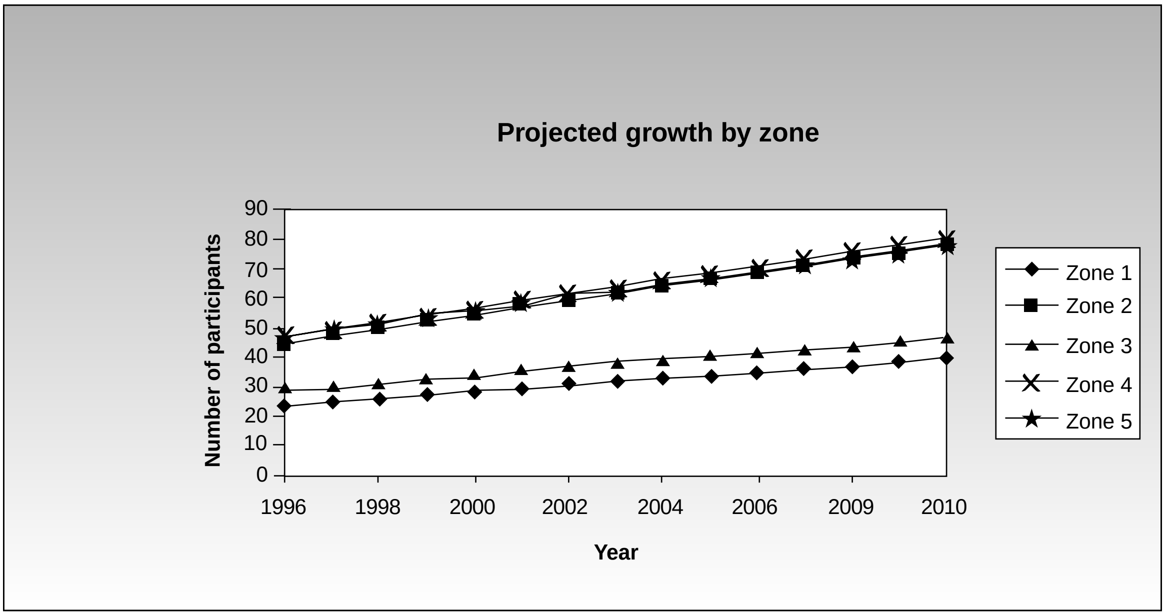


Figure C2: Growth projections under open access arrangements based on rate of growth demonstrated in each zone to date.

ESTIMATION OF CLIENT NUMBERS BASED ON PASSENGER CAPACITY OF VESSELS

Figure C3 illustrates the relationship between boat length and passenger capacity that exists on a Statewide basis, figure C4 illustrates the mean boat length per zone and Table C1 combines these data to illustrate the passenger capacity on a State-wide and regional basis for a range of trips per year.

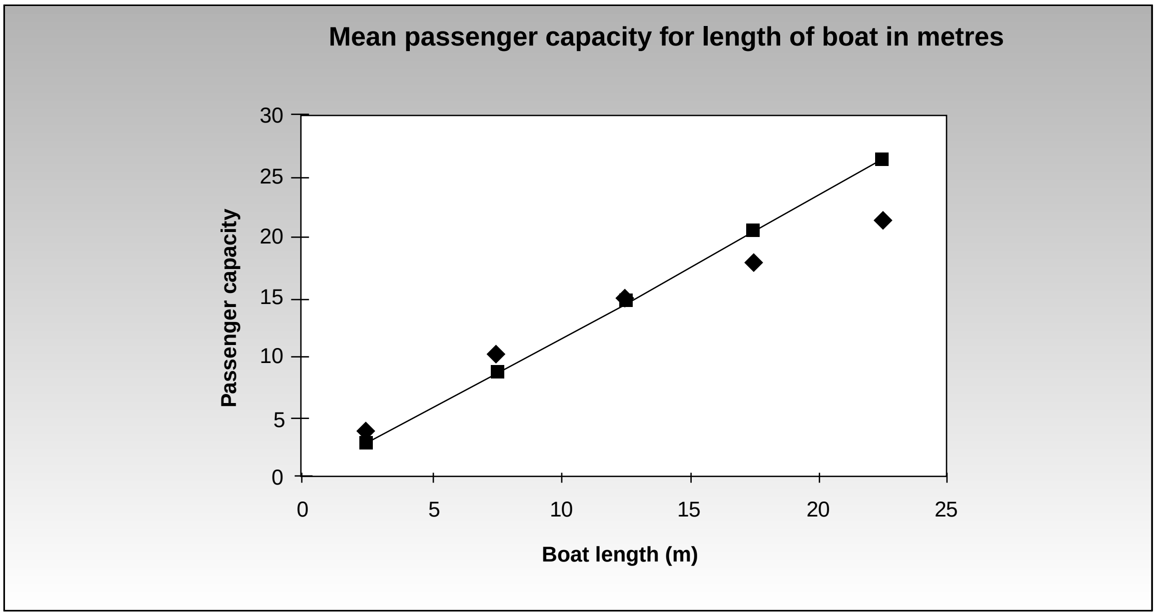


Figure C3: Mean passenger capacity for a given boat length (from entire State fleet data).

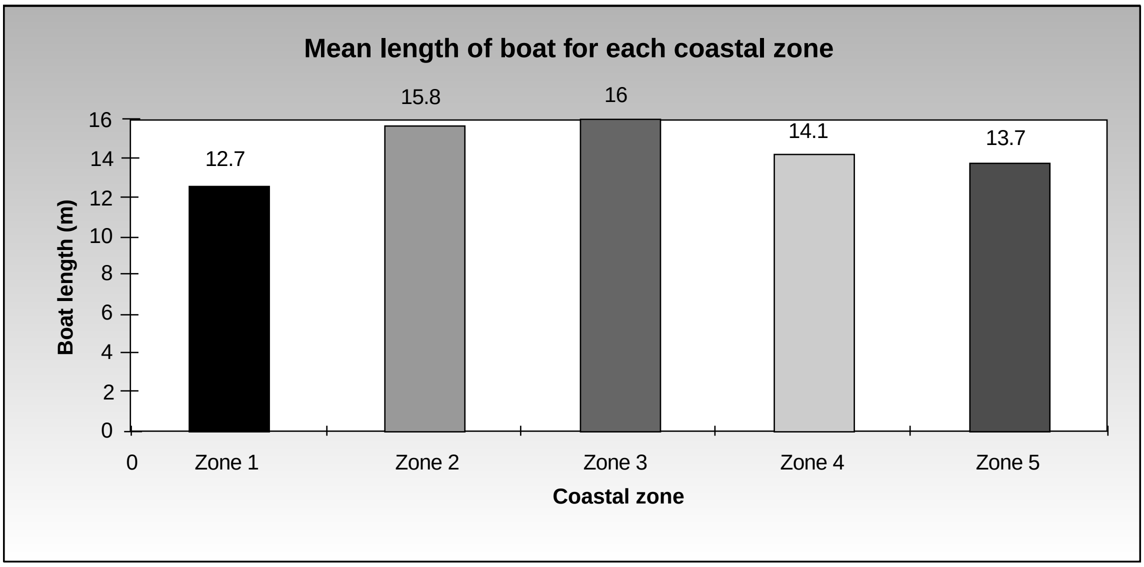


Figure C4: Mean length of boat operating in each of the coastal zones (includes mobile operators).

	State-wide	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
No. of operators	135	26	46	29	49	46
Mean capacity	16.84	14.79	18.40	18.63	16.42	15.96
Number of trips conducted annually						
1	2273	385	846	540	805	734
2	4547	769	1693	1081	1609	1468
3	6820	1154	2539	1621	2414	2202
4	9094	1538	3386	2162	3219	2936
5	11367	1923	4232	2702	4023	3670
6	13641	2307	5079	3242	4828	4404
7	15914	2692	5925	3783	5632	5138
8	18188	3076	6772	4323	6437	5872
9	20461	3461	7618	4863	7242	6605
10	22734	3846	8464	5404	8046	7339
11	25008	4230	9311	5944	8851	8073
12	27281	4615	10157	6485	9656	8807
13	29555	4999	11004	7025	10460	9541
14	31828	5384	11850	7565	11265	10275
15	34102	5768	12697	8106	12069	11009
16	36375	6153	13543	8646	12874	11743
17	38649	6537	14389	9186	13679	12477
18	40922	6922	15236	9727	14483	13211
19	43195	7307	16082	10267	15288	13945
20	45469	7691	16929	10808	16093	14679

Table C1: Estimation of number of operators the current industry could service for a range of trips per year based on datum from Figures 6 and 7.

When the data in Table C1 is combined with the projected size of industry in the year 2010, as has been done in Table C2, the effects of open access begin to become apparent. It should be noted that the derivation of these figures is based on the assumption that demand for the aquatic charter industry is not a limiting factor, ie. the relationship between supply and demand remains constant.

	State-wide
No. of operators	324
Mean capacity	16.84
2	10913
4	21825
6	32738
8	43650
10	54563
12	65475
14	76388
16	87300
18	98213
20	109125

Table C2: Projection of potential number of people employing the services of the tour and charter industry.

TYPE OF TOUR PROVIDED

For the purpose of this discussion paper, recipients of questionnaires were asked to describe the type of tour they provided. Respondents indicated that their tour type was either one that:

- purely targeted recreational fish (Type 1);
- targeted some recreational fish and observed natural attractions (Type 2);
- purely observed natural attractions (Type 3); or
- some combination of the above categories (Type 4).

Questionnaire recipients were asked to discriminate between tours based onboard a boat and dive tours.

Figures C5 and C6 illustrate the breakdown of tour provided by coastal zone - firstly in whole numbers and then as a percentage for onboard type tours. A similar analysis of tour type for dive tours is contained in Figures C7 and C8.

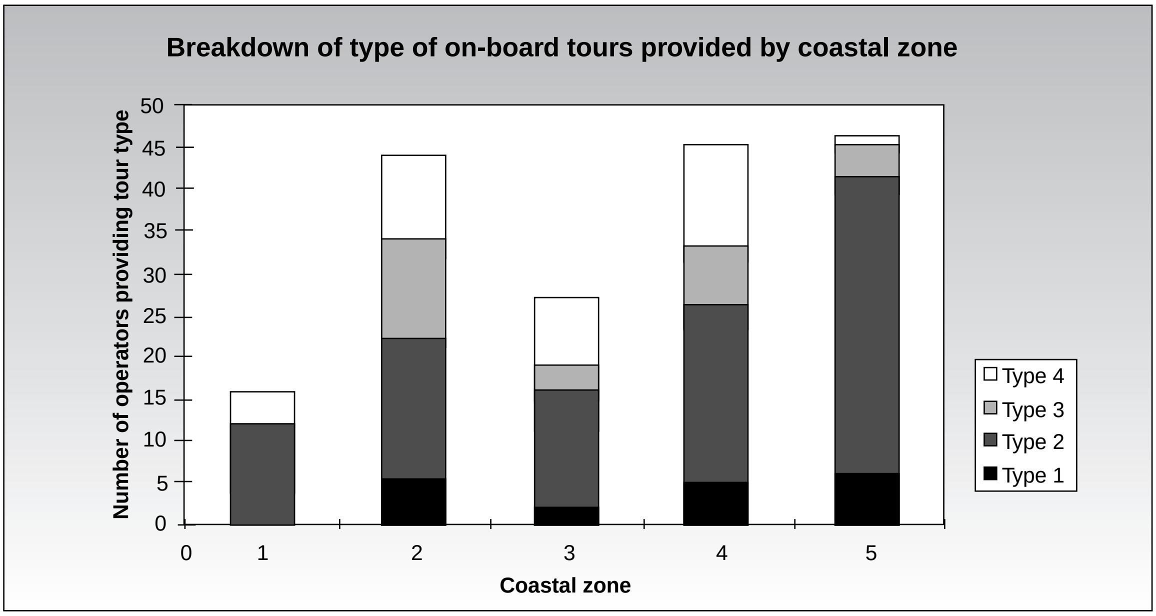


Figure C5: Type of on-board tours provided, by coastal zone: participant numbers.

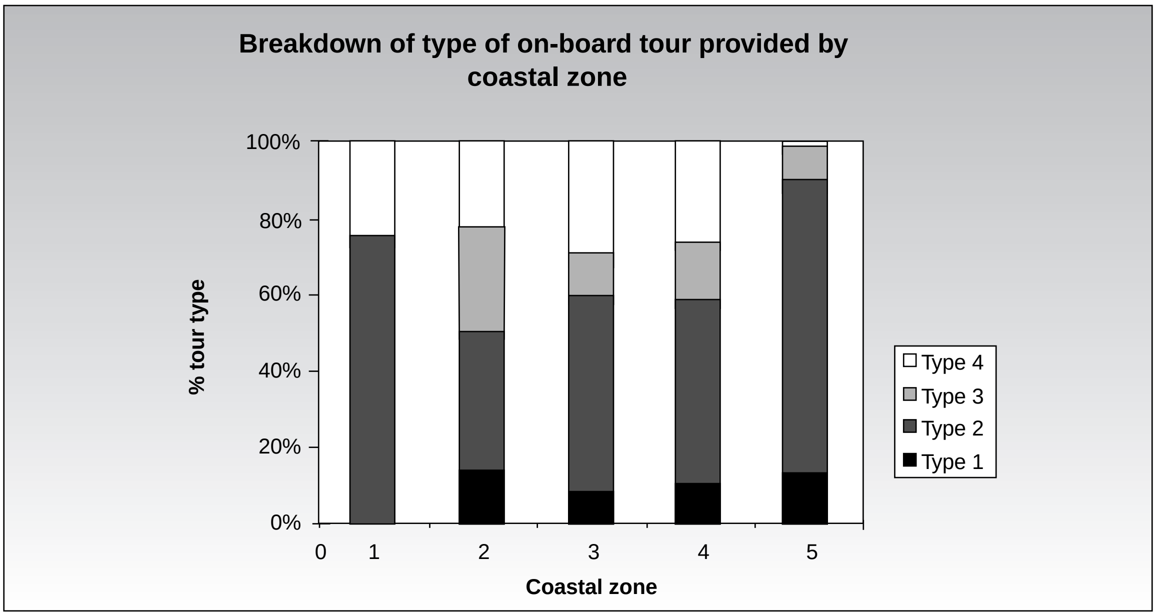


Figure C6: Type of on-board tours provided, by coastal zone: participant percentages.

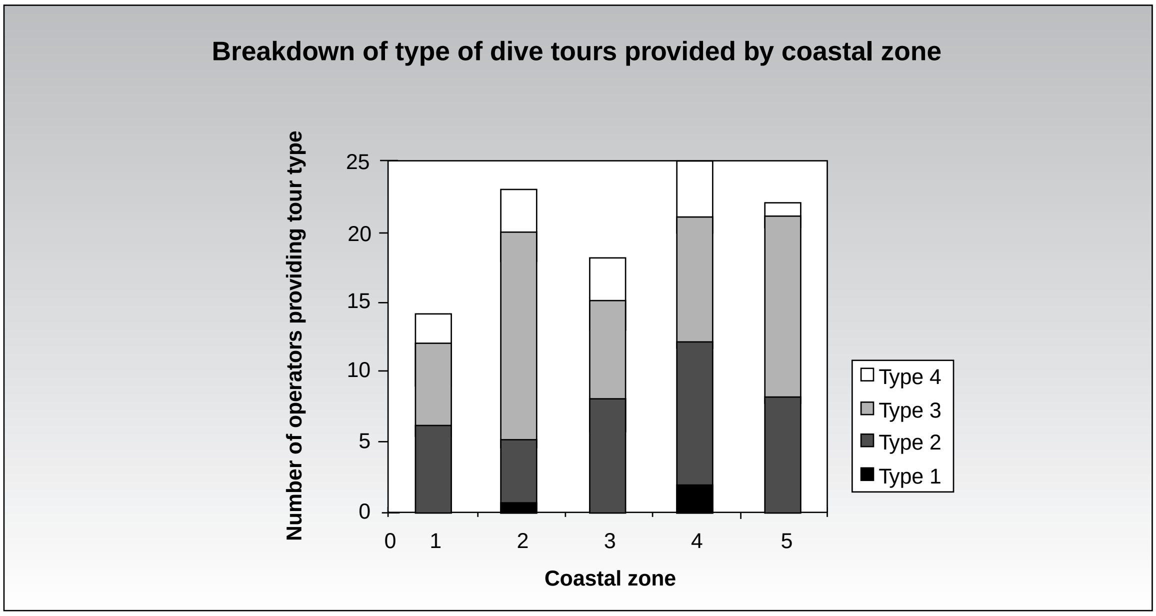


Figure C7: Type of dive tours provided, by coastal zone: participant numbers.

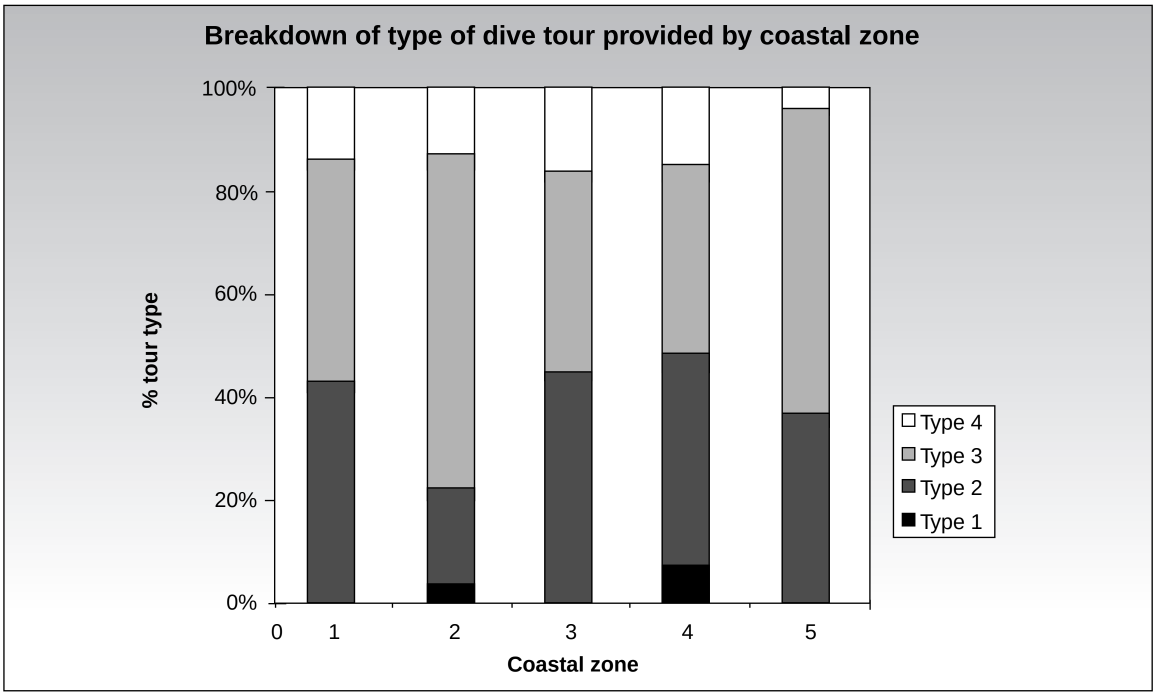


Figure C8: Type of dive tour provided, by coastal zone: participant percentages.

SEASONALITY OF COASTAL ZONES

It was possible to extract data from the compiled questionnaire responses on seasonality of operation using boat months as the measure of effort, and the peaks and troughs in boat months are largely the result of movement between regions by mobile operators to take advantage of seasonal trends.

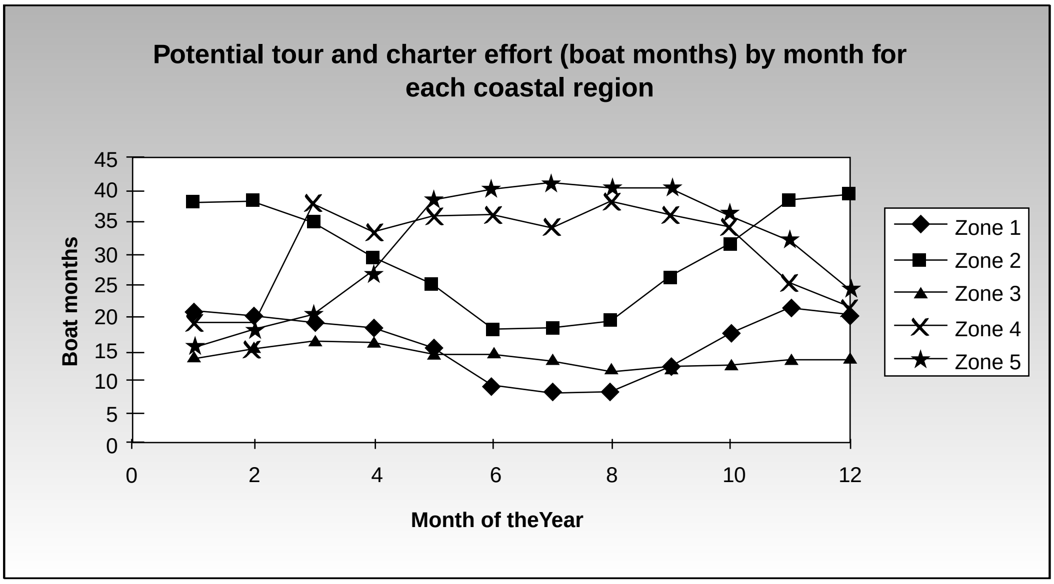


Figure C9: Fluctuations in boat months due to seasonality of operation and influence of mobile operators for each coastal zone.

STANDARD OF SERVICE AND THE LEVEL OF TRAINING THAT EXISTS WITHIN THE INDUSTRY

Recipients of the questionnaire were asked two questions with respect to training:

- Have you or your crew any training that is relevant to your tour operation?
- If available, would you or your crew be interested in participating in ongoing training? Which topics would you like included in such training sessions?

Responses to the above questions were varied, but Figure 2 illustrates the type of training that already exists within the industry, while Figure 3 illustrates the type of training operators and their crew would be willing to participate in - both figures generated by frequency of response.

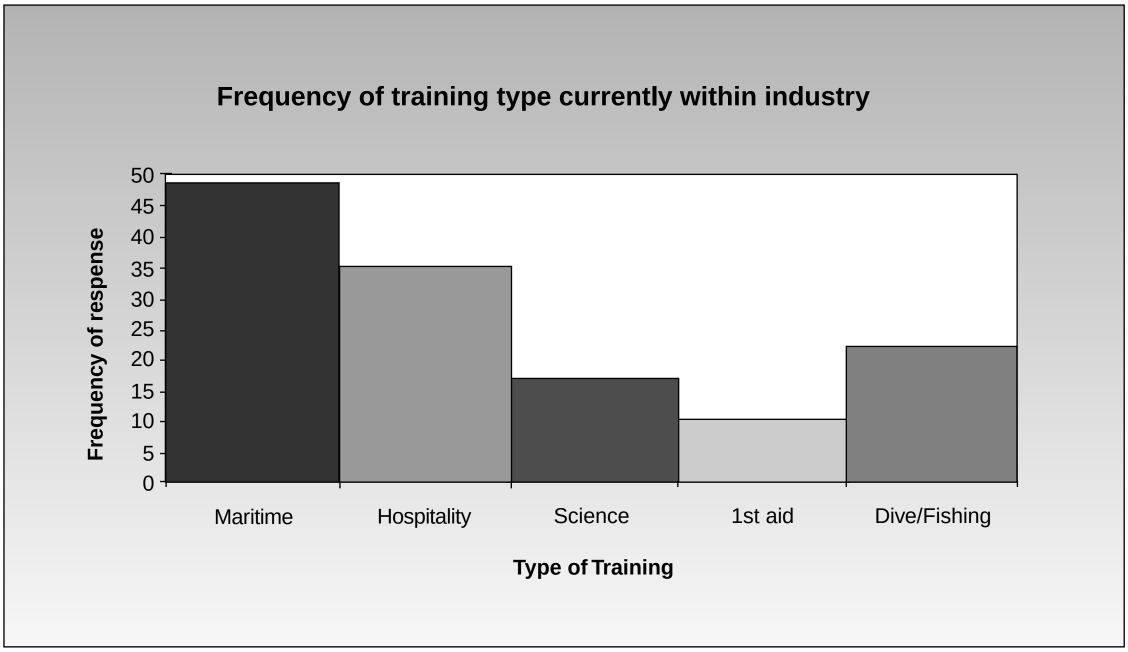


Figure C10: Level of training that currently exists in the industry for the five most responded to types of training.

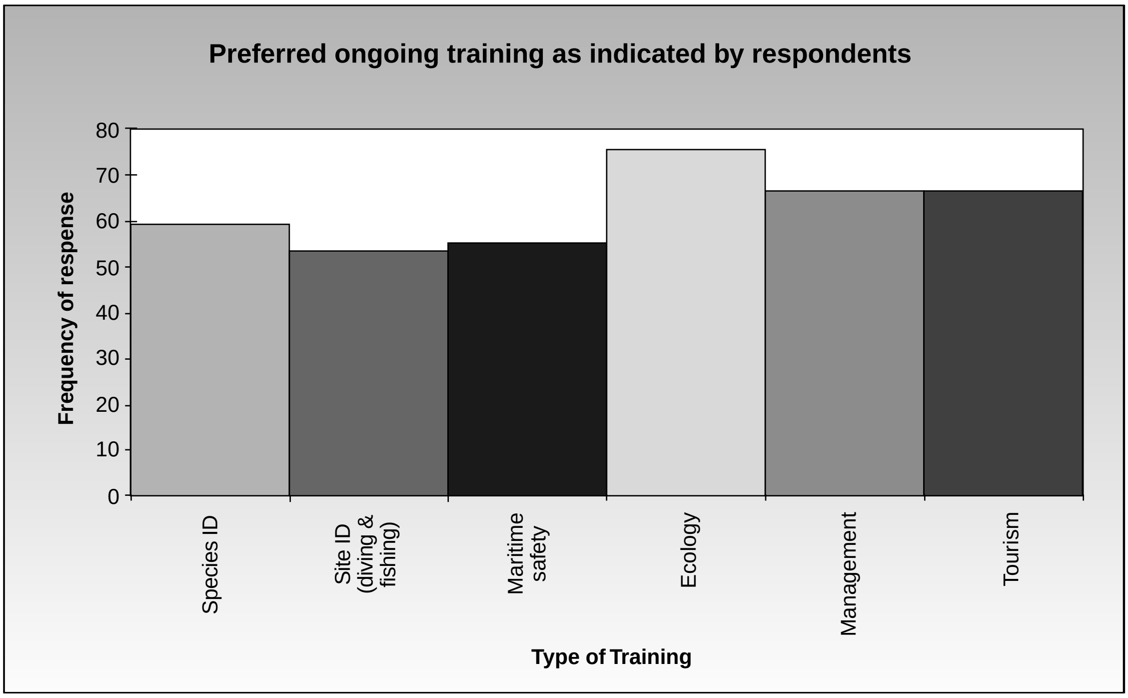


Figure C11: Frequency of response for preferred type of training in an ongoing manner.

ORIGIN OF CLIENTS

Information from the 135 returned questionnaires indicates that clientele for the WA aquatic charter industry breaks down as follows:

- WA: 61 per cent
- Interstate: 24 per cent
- Overseas: 15 per cent

These figures indicate that the majority of people who employ the services of an aquatic charter operator originate from within WA. However, it should be noted that these figures are somewhat subjective, as client origin is not a statistic all operators record - the responses given in the questionnaire are more likely to be an estimate based on the operators experience.

Western Australian clients

Local clients employ aquatic charter operations for a variety of reasons, and it is likely that the majority of these clients are from areas other than that in which they have employed the service of a tour or charter operator. Motivation for charter may include:

- attractive tourism activity;
- regular booking as part of periodic fishing, diving or other holiday; and
- remoteness of area and lack of personal equipment and knowledge to take part in the aquatic activity.

Interstate and Overseas clients

The proportion of interstate and overseas clients (39 per cent in total) is certainly a significant component of the industry's clientele. This high percentage confirms the reputation WA has as a location for high standard fishing, diving and other aquatic activities. It is also justifiable to state that access by air to some of the more remote areas of WA's coastline has made the tour and charter industry in these areas more attractive to interstate or overseas visitors.

INDUSTRY PROMOTION

Questionnaire respondents indicated that there is a high degree of business promotion (87 per cent of respondents promoting their business in some form), however, the majority of this promotion is localised. The Working Group believes that while the industry remains open access marketing efforts may attract people to the industry but not necessarily to those who do the marketing- only resulting in increased resource impact.

Currently, there is very little active promotion of WA's tour and charter industry by the Tourism Commission outside of WA.

Appendix D
Consultation Process

March 1996	Minister for Fisheries approved formation of TOFWG
June 1996	First meeting of TOFWG
July 1996	Notice to all tour/charter operators - asked to contact Fisheries WA and register interest for inclusion in consultation.
August 1996	Questionnaire developed to ascertain the extent and scope of the industry in WA forwarded to all identified aquatic charter operators.
September 1996	TOFWG Meeting
October 1996	Additional survey questionnaires forwarded to all identified aquatic charter operators. Questionnaire designed to gather baseline data on the aquatic charter industry. 135 questionnaires returned.
January 1997	TOFWG Meeting
April 1997	TOFWG Meeting
September 1997	TOFWG Discussion Paper approved by Minister for Fisheries for publication and a 3 month public consultation period.
September 1997	Discussion Paper released 12 September Ministerial Media Release 12 September Advertised in *West Australian*
September - November 1997	Articles in regional and community newspapers
September - December 1997	Copies of Discussion Paper forwarded directly to: • all identified aquatic charter operators (approximately 135); • WA Fishing Industry Council and Professional Fishermen's Associations; • Department of Transport; • Department of Conservation and Land Management; • WA Tourism Commission; • Recreational Fishing Advisory Committee (RFAC) and Regional RFACs; • RECFISHWEST; • Development Commissions; and • various local governments. The Discussion Paper was also distributed to all interested persons from regional and central Fisheries WA Offices.

Over 1000 copies of the Discussion Paper were released.

November 1997	Fisheries WA media release, reminding that submissions are due.
December 1997	Public consultation period closed. A total of 56 submissions were received. Approximately 70 per cent of submissions were from the aquatic charter industry and 30 per cent of submissions were from community, non charter industry organisations and Government.
January 1998	TOFWG Meeting to finalise recommendations in light of public submissions.
September 1998	Final report forwarded to Minister for Fisheries for consideration.

Appendix E

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
	Integrated Management				
1	That a 'whole of Government' approach to the management of the aquatic charter industry be recognised as most beneficial to the industry and governing bodies.	• Strongly support Integrated Management.	100%	That Government adopt this report as a strategy for a 'whole of Government' approach to management of the Aquatic Charter Industry and be recognised as a key element in the Government's 'Nature Based Tourism Strategy'.	Amended to be more precise. Inclusion of this report in the Nature Based Tourism Strategy will ensure the aquatic charter industry is involved in the development of the tourism industry of WA.
2	That an investigation into the feasibility of a 'whole of Government' management strategy through high level discussions between relevant Ministers and Government agencies be adopted.	• Each major town in each proposed zone to have one office dedicated to management and administration of charter industry - a 'one stop shop' for information and service for CALM, DOT and Fisheries WA licensing requirements.	100%	a) That an investigation into the feasibility of a 'whole of Government' management strategy through high level discussions between relevant Ministers and Government agencies be adopted. b) That a task force be formed immediately to formulate a memorandum of understanding between appropriate departments.	Amended to be more precise. The development of an integrated management strategy as soon as possible is crucial to the implementation of recommendations in this paper.
	Resource Allocation				
3	That the catch from charter fishing operations be recognised as part of the total recreational catch.	• Accumulation limits should be imposed. • Processing fish at sea should be permitted as this is a customer service. • Charter operations should be considered as part of the recreational fishing sector. • Charter operations can be made to look like a fishing club, and vice versa, if advantages in doing so. • Reduce bag limits for recreational fishers.	100%	Unchanged from draft recommendation.	
4	In recognition of the differences between the aquatic charter industry, the commercial fishing industry and the recreational fishing sector, the aquatic charter industry should be recognised as a distinct aquatic resource user group for the purpose of industry management and consultation.		93%	The aquatic charter industry should be recognised as an important stakeholder in the management of recreational fisheries and the marine environment and included in any consultation process to develop recreational management of the resource.	The aquatic charter industry is essentially a service provider to the recreational fishing sector and should be involved in consultation.

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
5	That management arrangements, in addition to general recreational fishing regulations, be implemented to maintain the catch from charter operators at sustainable levels.	• Bag limits should be same for recreational fishers and charter operations.	100%	a) That management arrangements, in addition to general recreational fishing regulations, be implemented to maintain the catch from charter operators at sustainable levels. b) That excessive catches be limited by management measures which may include accumulation limits and lower bag limits for fishing charter clients.	Amended to be more precise. Large accumulated catches are against the recreational fishing ethic to "catch a feed for one's self and ones family". Recreational fishing efficiencey is increased substantially on charter trips.
	Growth of Industry				
6	That a new license category under the *Fish Resources Management Act 1994* (FRMA) be introduced to licence aquatic charter operators that fall within the jurisdiction of the FRMA.	• Strongly support MOU. • Long term tenure required for licence.	89%	Unchanged from draft recommendation.	
7	That Fisheries WA and CALM develop a Memorandum of Understanding to ensure that existing licensing arrangements administered by CALM and the aquatic charter licence proposed in this paper are managed in a coordinated and cooperative manner to ensure protection of environmental and other resource values and sustainability of aquatic charter operator opportunities.	• increased time frame for benchmark date not supported. • strongly opposed to licences becoming capital assets and support non transferable licenses. Prefer management strategies to reduce effort that a buy-back scheme in cases of localised stock depletion. • Licences should be transferable and limited entry for security of future. Do not agree to management fees unless licences are limited entry and transferable.	100%	Unchanged from draft recommendation.	

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
8	That to be issued with an aquatic charter licence under the FRMA the applicant must demonstrate an involvement as an aquatic charter operator (charter fishing or aquatic ecotourism) in the period 1 July 1993 to 30 June 1996.	• How is resource allocation to be managed for non consumptive charter activities? Non consumptive operations should have easier access criteria to enter the industry. • Industry needs ability to offer services to all ranges of socio-economic clients. • Licence categories too restrictive. Management cost should be more for charter fishing as compared to less consumptive charters. Particularly for operators who only take some small amounts of fish on eco-tourism based operations. • Licensing unjustified for small operators.	61%	a) If the number of licences in a particular area needs to be limited for resource management reasons, then a history of investment in the aquatic charter industry prior to 12 September 1997 will be part of the selection criteria for access determination. b) Until the relevant impact of the charter industry can be determined, as a precautionary measure, a ceiling for the number of operators in each region should be established. c) Any further investment after that date will be at the operator's own risk as there will be no guarantee of success. d) A working group involving the aquatic charter industry and the RFAC should be established immediately to determine, in consultation with CALM and Fisheries WA, what the number of operators should be in each region.	History of investment should be considered as part of any selection criteria in the initial allocation of licences. To this effect, a precautionary approach is necessary in any initial allocation of licences to avoid potential excessive fishing effort which may impact on sustainability of fish stocks. and reduce any need for future removal of excess effort in the industry.
9	That there be three classes of aquatic charter licence: a) charter fishing b) aquatic ecotourism; and c) charter fishing and aquatic ecotourism.	• Industry needs to develop in a free market situation. • Concern raised about current non SPV vessels operating eg fishing clubs and personal pleasure craft. • Licences (or form of) must not imply long term property rights to licence holders.	79%	e) That there be two classes of aquatic charter licence: 1) aquatic ecotourism; and 2) fishing tours and aquatic ecotourism. "Aquatic ecotourism" means a commercial fee for service operation which provides services relating to fish in their natural environment and includes the viewing or feeding of fish but does not include the taking of fish. "Fishing tours" is defined as a commercial fee for service operation which provides services relating to the take, capture or catching of fish. b) Any scale of fees for licenses should reflect the potential impact on the resources.	Licence categories assist in the allocation of management costs. An aquatic eco-tourism licence should be required for all operators and attract a basic fee. If the charter operation includes the use of fish resources and additional fee should be charged.

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
10	That the licence apply to charter operations, defined above, in both State and Commonwealth waters of the Australian Fishing Zone, and be required for both resident and non-resident operations.		100%	The Offshore Constitutional Settlement (OCS) needs to be adjusted to ensure management of recreational and charter fishing for all species is vested in the State and associated management costs should be met through Federal funding.	The allocation of jurisdiction over all recreational and charter fishing activity from the commonwealth to the State will mean ability for the State to manage these activities, including charter licences to apply in waters to 200 nautical miles for the the coast.
11	Non-fishing charter activities within marine parks and charter activities subject to management under the *Wildlife Conservation Act 1950* and other zonal access should be treated separately, and managed under existing arrangements. Further development of management for zonal access to be subject to consultation with the aquatic charter industry and be consistent with regional fisheries management plans for recreational fishing and marine conservation areas.		92%	Unchanged from draft recommendation.	
12	Fees should be set according to cost-recovery principles, and initially based on the cost of management recommendations detailed later in this paper.		76%	Unchanged from draft recommendation.	

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
	Excess Capacity In Industry				
13	That, where there is a likelihood of over-exploitation of fish resources or unacceptable impact on the quality of the tourism experience, minimum performance criteria should be developed for continuing eligibility for aquatic charter licences.	• Concern that performance criteria will make operators fish harder and encourage false returns (RECFISHWEST and individuals). • Concern with Fisheries deciding eligibility of an aquatic charter operator based on perceived viability 3 (industry).	83%	Unchanged from draft recommendation.	
	Dual Licencing And Risk Of Escalating Effort				
14	That a commercial fishing trip and a charter fishing trip cannot be conducted at the same time.	• Should be allowance for possibility of paying passengers accompanying a commercial fishing operation and catch from that operation sold.	86%	Unchanged from draft recommendation.	
15	Operators who hold both a commercial fishing licence and a charter fishing operators licence should be required to clearly nominate the nature of their fishing trip to a Fisheries Department office before leaving port.	• Nominating forms of fishing before undertaking commercial fishing or charter operations is unworkable for operators in remote areas.	94%	Unchanged from draft recommendation.	
16	Any fish caught on a charter trip should be taken under recreational or charter fishing regulations, and are not saleable.	• "Can't commercially fish and offer quality service at same time". • "Licences for full time charter operators only"	88%	Unchanged from draft recommendation.	

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
17	That any authorisation associated with fishing boat licences allowing the sale of recreationally caught fish be removed from charter fishing vessels.	• Ability to catch fish for selling while on charter allows lower client prices. • Charter operators should not hold FBL due to sales tax exemptions and fuel rebate advantages.	93%	Unchanged from draft recommendation.	
	Lack Of Integration With Management Of Other Sectors				
18	That the charter fishing industry be included in an integrated approach to fish resource management.		100%	That the charter fishing industry be included in an integrated approach to fish resource management and that in any review of the commercial wetline fishery, the recreational charter industry fishing zones be considered as a basis for resource sharing.	Amended to be more precise. The use of similar zones as management tools for resource sharing between these fisheries will allow an integrated approach to management.
	Unknown Catch And Unknown Impact On Resource				
19	That all licensed aquatic charter operators be required, as a condition of licence, to submit a periodic and detailed research log book t the Fisheries Department or CALM as appropriate.	• Spot checks should be undertaken to ensure compliance with log book recording.	100%	Unchanged from draft recommendation.	
20	An integrated database and collection system for charter operators be developed to provide the Fisheries Department with more detailed information on catch and effort and fish population structure.		100%	Unchanged from draft recommendation.	

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
	Localised Stock Depletion				
21	That the Western Australian coast be broken into five zones of operation, consistent with regional recreational fisheries management strategies, and that access for charter operators will be allocated according to management objectives or natural resource carrying capacity.	• Opposed due to National Competition Policy concerns. • Supports and would like to be involved in assessment process (RECFISHWEST). • Flexibility important to some industry operators.	84%	Unchanged from draft recommendation.	
22	In assessing applications, the charter and other fishing effort that exists within the area, and whether the area can sustain additional pressure, will be taken into consideration.	• Ecotourism operators should not be restricted by zones - only charter fishing operations.	100%	Unchanged from draft recommendation.	
23	That applications must include a business plan explicitly detailing the proposed operation.	• Business plans should only apply to new applicants. • "Higher fee for extra zone licences". • Zonal limitations will limit some current operations which have specific purposes.	100%	Unchanged from draft recommendation.	
24	That access to the zones be determined by demonstrated history of commitment to the industry or predetermined selection criteria. In the event that reduction in the number of licences is required, the participants would participate in a "buy back" system.	• Commercial confidentiality issues raised in business plan submissions. • Need for applicants to show economic benefit to the communities they are operating from.	79%	That access to the zones be determined by demonstrated history of commitment to the industry or predetermined selection criteria.	Refer to comments under recommendation 8.

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
25	The assessment of applications would follow a process approved by the Minister for Fisheries.	• Zones should be consistent with proposed recreational fisheries management zones. • Allowance should be made for some movement across zones.	100%	That assessment of applications would follow a process approved by the Minister for Fisheries. Applications should be considered by a committee especially established for assessment purposes. The aquatic charter industry should be represented by a sub-committee and that the process be formulated in a whole of government approach. Provision should be made for an appeal process.	Amended to be more precise. An appeal process is catered for under the *Fish Resources Management Act 1994*.
	Deepwater Fish: Survival				
26	Bag limits for charter clients should be adjusted to assume a 100 per cent mortality of demersal fish caught in waters greater than 20 m in depth.	• Deepwater fishing should not be permitted to be advertised as a conservation practice. • Education may result in better outcomes than assuming 100 per cent mortality for fish caught >20m depth.	81%	Unchanged from draft recommendation.	
27	Consideration should be given to the introduction of controls pertaining to the catch-and-release of fish, particularly on ultra light line class. Further debate is required on this issue.		100%	Unchanged from draft recommendation.	
28	The effectiveness of legal sizes for identified species should be reviewed, and alternative stock conservation strategies developed where practical.		100%	The effectiveness of legal sizes for identified species should be reviewed, and alternative stock conservation strategies developed where practical. a) Consideration should be given to the prohibiting of the taking of finfish, crustacea and molluscs using underwater breathing apparatus.	Recommendations 26, 27 and 28 are conditional upon these issues being dealt with during the establishment of regional recreational fishing management plans. Regional recreational fisheries management plans are being developed in consultation with the community and recreational fishing stakeholders, including aquatic charter operators.

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
	Access Fee And Cost Recovery				
29	That the cost of management and consultation be born by those licenced in the industry.	• Management costs seem excessive in comparison to land based operations.	75%	That the cost of management and consultation be borne by those licenced in the industry and consideration be given to a staged implementation of this policy in consultation with the industry.	Amended to be more precise. Staged management costs will allow time for industry to adjust and the real cost of management to be determined.
30	Access fees should be charged in proportion to the level and type of use.	• Mangement costs need to be kept low as industry is not very profitable.	86%	Unchanged from draft recommendation.	
31	The allocation of access should meet with the principles of the National Competition Policy (Hilmer Report), and allow for rational business planning and provide a basis for operators' investment confidence.	• Recreational fishers should be charged (user pays).	100%	The allocation of access should meet with the principles of the National Competition Policy (Hilmer), and allow for rational business planning and provide a basis for investment confidence on the part of operators. The industry strongly recommends that licence holders be able to benefit from any goodwill value of the business associated with the transfer of licence, provided that the continuation of the licence does not adversely impact on the sustainability of the resource.	Industry strongly supported the ability to benefit from transfer of goodwill value.
32	That revenue from licence fees be directed into a trust fund for the management and future development of the industry.		100%	That revenue from charter licence fees be directed into a trust fund for the management and future development of the charter industry. Priority funding should be allocated to: • implementation of recommendations in this report; • establishment of a research program; • establishment of a peak body; and • ongoing management review.	Amended to be more precise. Industry will have the opportunity to provide input into the allocation o funds under cost recovery.

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
	Number Of Participants In Limited Areas				
33	Access arrangements should consider environmental impacts on fish, fish habitat and other resources.		100 %	Unchanged from draft recommendation.	
34	That the aquatic charter industry develop codes of conduct to encourage conservation-oriented fishing practices and environmentally friendly operating standards.		100 %	Unchanged from draft recommendation.	
35	That the aquatic charter industry encourage the development of industry associations to pursue the above recommendations.		100 %	Unchanged from draft recommendation.	
	Industry Image				
36	That the establishment of industry associations be encouraged and that these associations develop a code of conduct that will enable industry to market its services based on the provision of a quality, association-endorsed charter operation.	• Codes of conduct should be set according to Tourism Commission of Australia's Quality Assurance Accreditation Program.	100 %	That the establishment of industry associations be encouraged and that these associations develop a code of conduct that will enable industry to market its services based on the provision of a quality, assocation-endorsed charter operation. The peak industry associations should develop a relevant accreditation and training program in consultation with appropriate training bodies.	Amended to be more precise.
37	That good safety practices be incorporated into a code of conduct.		100 %	Unchanged from draft recommendation.	
38	That there be, as a requirement of licencing, a minimum public liability insurance held by the operator.		100 %	Unchanged from draft recommendation.	

#	Draft Recommendations	Synopsis of public comments	Public Support	Final Recommendations	Comments
	Management Advice: Representative Structure				
39	That the aquatic charter industry be encouraged to form a peak industry association.	• Strongly support development of peak industry associations.	100 %	Unchanged from draft recommendation.	
40	That the peak aquatic charter industry assocation be given recognition on the Recreation Fishing Advisory Committee (RFAC) in the same manner as the WA Recreational and Sportfishing Association. This will require an amendment to the FRMA.		100 %	Unchanged from draft recommendation.	
41	That, where appropriate, the aquatic charter industry be represented on other management advisory committees.		100 %	That, where appropriate, the aquatic charter industry be represented on other management advisory committees and marine reserves planning groups, marine parks advisory authority and other government working groups as applicable.	Amended to be more precise.

Appendix F
Participants in Consultation

Geraldton Region Tourism Association
Jaemar Fisheries Australia Pty. Ltd.
Western Australian Tourism Commission - Tourism Industry Development
RECFISHWEST
Smallcraft
Rottnest Island Aquatic Adventures
Western Australian Fishing Industry Council Inc (WAFIC)
Boating Management Services
Kimberley Coast Motherships
East Kimberley Aquatic Charter Interest Group
Monte Bello Island Safaris
Pinnacles Rock Lobster Cruises
Point Samson Charter Co.
Monkey Mia Wildlife Sailing
Kalbarri Explorer Ocean Charters
Department of Conservation and Land Management (CALM)
Marine Parks and Reserves Authority (CALM)
SAR Holdings Pty. Ltd.
Exmouth Game Fishing Charters
Mills Charters
Sherry Ellen Pty Ltd
Sea Venture Charters
Shark Bay Charter Service
'Blue Horizon' Exmouth - Makaira II Pty. Ltd.
Esperance Diving and Fishing
3 Islands Marine Charters Pty. Ltd.
Jodi Anne Charters
MV Explorer Charters & Cruises
Corsair Charters
Robert Vaughan's Kimberley Fishing
Fine Line Charters
Dominator Fishing Charters
Swing-Shift Jet Tours
Mini Fishing Charters
Key Charter
Geraldton Professional Fisherman's Association
Regional Recreational Fishing Advisory Committee - Mid-west
Regional Recreational Fishing Advisory Committee - West Kimberley
Laurel Investments Pty. Ltd.
Travelabout
Geraldton Professional Fishermen's Association
Fisheries Western Australia
Jeff Bubb
Nea Lawson
Neil Williams

John Nelson
Peter Steel
Jamie Waite
Graham Maunder
Ian Donaldson
Max Gazeley
Geoff Bury
Terry Howson
Ray Watt
Raphael Ellul
Rod Dransfield
Simon Brown
Peter Powell

Fisheries management papers

No. 1 The Report of the Southern Western Australian Shark Working Group. Chairman P. Millington (1986).

No. 2 The Report of the Fish Farming Legislative Review Committee. Chairman P. Rogers (1986).

No. 3 Management Measures for the Shark Bay Snapper 1987 Season. P. Millington (1986).

No. 4 The Esperance Rock Lobster Working Group. Chairman A. Pallot (1986).

No. 5 The Windy Harbour-Augusta Rock Lobster Working Group. Interim Report by the Chairman A. Pallot (1986).

No. 6 The King George Sound Purse Seine Fishery Working Group. Chairman R. Brown (1986).

No. 7 Management Measures for the Cockburn Sound Mussel Fishery. H. Brayford (1986).

No. 8 Report of the Rock Lobster Industry Advisory meeting of 27 January 1987. Chairman B. Bowen (1987).

No. 9 Western Rock Lobster Industry Compensation Study. Arthur Young Services (1987).

No. 10 Further Options for Management of the Shark Bay Snapper Fishery. P. Millington (1987).

No. 11 The Shark Bay Scallop Fishery. L. Joll (1987).

No. 12 Report of the Rock Lobster Industry Advisory Committee to the Hon Minister for Fisheries 24 September 1987. (1987).

No. 13 A Development Plan for the South Coast Inshore Trawl Fishery. (1987).

No. 14 Draft Management Plan for the Perth Metropolitan Purse Seine Fishery. P. Millington (1987).

No. 15 Draft management plan, Control of barramundi gillnet fishing in the Kimberley. R.S. Brown (1988).

No. 16 The South West Trawl Fishery Draft Management Plan. P. Millington (1988).

No. 17 The final report of the pearling industry review committee. F.J. Malone, D.A. Hancock, B. Jeffriess (1988).

No. 18 Policy for Freshwater Aquaculture in Western Australia. (1988).

No. 19 Sport Fishing for Marron in Western Australia – Management for the Future. (1988).

No. 20 The Offshore Constitutional Settlement, Western Australia 1988.

No. 21 Commercial fishing licensing in Western Australia. (1989).

No. 22 Economics and marketing of Western Australian pilchards. SCP Fisheries Consultants Pty Ltd (1988).

No. 23 Management of the south-west inshore trawl fishery. No. Moore (1989).

No. 24 Management of the Perth metropolitan purse-seine fishery. No. Moore (1989).

No. 25 Rock Lobster Industry Advisory Committee report to the Minister for Fisheries November 1988. (1989).

No. 26 A report on marron fishing in Western Australia. Chairman Doug Wenn MLC (1989).

No. 27 A review of the Shark Bay pearling industry. Dr D.A. Hancock (1989).

No. 28 Southern demersal gillnet and longline fishery. (1989).

No. 29 Distribution and marketing of Western Australian rock lobster. P. Monaghan (1989).

No. 30 Foreign investment in the rock lobster industry. (1989).

No. 31 Rock Lobster Industry Advisory Committee report to the Hon Minister for Fisheries September 1989. (1989).

No. 32 Fishing Licences as security for loans. P. Rogers (1989).

No. 33 Guidelines for by-laws for those Abrolhos Islands set aside for fisheries purposes. No. Moore (1989).

No. 34 The future for recreational fishing – issues for community discussion. Recreational Fishing Advisory Committee (1990).

No. 35 Future policy for charter fishing operations in Western Australia. P. Millington (1990).

No. 36 Long term management measures for the Cockburn Sound restricted entry fishery. P. Millington (1990).

No. 37 Western rock lobster industry marketing report 1989/90 season. MAREC Pty Ltd (1990).

No. 38 The economic impact of recreational fishing in Western Australia. R.K. Lindner, P.B. McLeod (1991).

No. 39 Establishment of a registry to record charges against fishing licences when used as security for loans. P. Rogers (1991).

No. 40 The future for Recreational Fishing – Forum Proceedings. Recreational Fishing Advisory Committee (1991).

No. 41 The future for Recreational Fishing – The Final Report of the Recreational Fishing Advisory Committee. Recreational Fishing Advisory Committee (1991).

No. 42 Appendix to the final report of the Recreational Fishing Advisory Committee. (1991).

No. 43 A discussion of options for effort reduction. Southern Gillnet and Demersal Longline Fishery Management Advisory Committee (1991).

No. 44 A study into the feasibility of establishing a system for the buy-back of salmon fishing authorisations and related endorsements. (1991)

No. 45 Draft Management Plan, Kimberley Prawn Fishery. (1991).

No. 46 Rock Lobster Industry Advisory Committee, Chairman's report to the Minister (1992).

No. 47 Long term management measures for the Cockburn Sound restricted entry fishery. Summary of submissions and final recommendations for management. P. Millington (1992).

No. 48 Pearl oyster fishery policy guidelines (Western Australian Pearling Act 1990). Western Australian Fisheries Joint Authority (1992).

No. 49 Management plan, Kimberley prawn fishery. (1992).

No. 50 Draft management plan, South West beach seine fishery. D.A. Hall (1993).

No. 51 The west coast shark fishery, draft management plan. D.A. Hall (1993).

No. 52 Review of bag and size limit proposals for Western Australian recreational fishers. F.B. Prokop (May 1993).

No. 53 Rock Lobster Industry Advisory Committee, Chairman's report to the Minister for Fisheries. (May 1993).

No. 54 Rock Lobster Industry Advisory Committee, Management proposals for 1993/94 and 1994/95 western rock lobster season (July 1993).

No. 55 Rock Lobster Industry Advisory Committee, Chairman's report to the Minister for Fisheries on management proposals for 1993/94 and 1994/95 western rock lobster seasons (September 1993).

No. 56 Review of recreational gill, haul and cast netting in Western Australia. F.B. Prokop (October 1993).

No. 57 Management arrangements for the southern demersal gillnet and demersal longline fishery 1994/95 season. (October 1993).

No. 58 The introduction and translocation of fish, crustaceans and molluscs in Western Australia. C. Lawrence (October 1993).

No. 59 Proceedings of the charter boat management workshop (held as part of the 1st National Fisheries Manager Conference). A.E. Magee & F.B. Prokop (November 1993).

No. 60 Bag and size limit information from around Australia (Regulations as at September 1993) F.B. Prokop (January 1993).

No. 61 Economic impact study. Commercial fishing in Western Australia Dr P. McLeod & C. McGinley (October 1994).

No. 62 Management arrangements for specimen shell collection in Western Australia. J. Barrington, G. Stewart (June 1994).

No. 63 Management of the marine aquarium fish fishery. J. Barrington (June 1994).

No. 64 The Warnbro Sound crab fishery draft management plan. F. Crowe (June 1994).

No. 65 Not issued.

No. 66 Future management of recreational gill, haul and cast netting in Western Australia and summary of submissions to the netting review. F.B. Prokop, L.M. Adams (September 1994).

No. 67 Long term management strategies for the Western Rock Lobster Fishery. (4 volumes) Evaluation of management options Volume 1. B.K. Bowen (September 1994).

No. 68 Long Term management strategies for the Western Rock Lobster Fisher. (4 volumes) Economic efficiency of alternative input and output based management systems in the western rock lobster fishery, Volume 2. R.K. Lindner (September 1994).

No. 69 Long Term management strategies for the Western Rock Lobster Fisher. (4 volumes) A market-based economic assessment for the western rock lobster industry, Volume 3. Marec Pty Ltd (September 1994).

No. 70 Long Term management strategies for the Western Rock Lobster Fisher. (4 volumes) Law enforcement considerations, Volume 4. N. McLaughlan (September 1994).

No. 71 The Rock Lobster Industry Advisory Committee Chairman's Report, October 1994, The Western Rock Lobster Fishery – Management proposals for the 1994/95 and 1995/96 seasons (November 1994).

No. 72 Shark Bay World Heritage Area draft management plan for fish resources. D. Clayton (November 1994).

No. 73 The bag and size limit review: new regulations and summary of submissions. F. Prokop (May 1995).

No. 74 Report on future management options for the South West trawl limited entry fishery. South West trawl limited entry fishery working group (June 1995).

No. 75 Implications of Native Title legislation for fisheries management and the fishing industry in Western Australia. P. Summerfield (February 1995).

No. 76 Draft report of the South Coast estuarine fishery working group. South Coast estuarine fishery working group. (February 1995).

No. 77 The Offshore Constitutional Settlement, Western Australia. H. Brayford & G. Lyon (May 1995).

No. 78 The Best Available Information – Its Implications for Recreational Fisheries Management. Workshop at Second National Fisheries Managers Conference, Bribie Island Queensland. F. Prokop (May 1995).

No. 79 Management of the Northern Demersal Scalefish Fishery. J. Fowler (June 1995).

No. 80 Management arrangements for specimen shell collection in Western Australia, 1995. J. Barrington & C. Campbell (March 1996).

No. 81 Management Options (Discussion Paper) for the Shark Bay Snapper Limited Entry Fishery. Shark Bay Snapper Limited Entry Fishery Working Group. Chaired by Doug Bathgate (June 1995).

No. 82 The Impact of the New Management Package on Smaller Operators in the Western Rock Lobster Fishery R. Gould (September 1995).

No. 83 Translocation Issues in Western Australia. Proceedings of a Seminar and Workshop held on 26 and 27 September 1994. F. Prokop (July 1995).

No. 84 *Bag and Size Limit Regulations From Around Australia. Current Information as at 1 July 1995. Third Australasian Fisheries Managers Conference, Rottnest Island. F. Prokop (July 1995).*

No. 85 *West Coast Rock Lobster Fishery Management Plan 1995 – Draft for Public Comment. Edited by M. Moran (August 1995).*

No. 86 *A Review of Ministerial Policy Guidelines for Rock Lobster Processing in Western Australia from the Working Group appointed by the Minister for Fisheries and chaired by Peter Rich (December 1995).*

No. 87 *Same Fish – Different Rules. Proceedings of the National Fisheries Management Network Workshop held as part of the Third Australasian Fisheries Managers Conference. F. Prokop.*

No. 88 *Balancing the Scales – Access and Equity in Fisheries Management – Proceedings of the Third Australasian Fisheries Managers Conference, Rottnest Island, Western Australia 2-4 August 1995. Edited by P. Summerfield (February 1996).*

No. 89 *Fishermen's views on the future management of the rock lobster fishery. A report. Prepared on behalf of the Rock Lobster Industry Advisory Committee by The Marketing Centre. (August 1995).*

No. 90 *A report on the issues effecting the use of the Dampier Archipelago. Peter Driscoll, Landvision Pty Ltd (March 1996).*

No. 91 *Shark Bay World Heritage Property – Management Paper for Fish Resources. Kevin A Francesconi (September 1996).*

No. 92 *Pearling and Aquaculture in the Dampier Archipelago – Existing and Proposed Operations. A report for public comment. Compiled by Ben Fraser (September 1996).*

No. 93 *Shark Bay World Heritage Property – Summary of Public Submissions to the Draft Management Plan for Fish Resources. Kev A. Francesconi (September 1996).*

No. 94 *Rock Lobster Industry Advisory Committee Report – Management arrangements for the Western Rock Lobster Fishery for the 1997/98 season. Frank Prokop (May 1997).*

No. 95 *Australian Salmon and Herring Resource Allocation Committee. P. McLeod & F. Prokop (in press).*

No. 96 *Summary Report of the Freshwater Aquaculture Taskforce (FAT) by Chris Wells (in press)*

No. 97 *(in press).*

No. 98 *A Pricing Policy for Fisheries Agencies – Standing Committee on Fisheries and Aquaculture Management Committee. P. Millington (March 1997).*

No. 99 *Management of the South Coast Purse Seine Fishery. J. Fowler, R. Lenanton, M. Moran & D. Gaughan.*

No. 100 *The Aquaculture of non-endemic species in Western Australia – Redclaw crayfish (Cherax quadricarinatus). Tina Thorne (June 1997).*

No. 101 *Optimising the worth of the catch – Options and Issues. Marec Pty Ltd (September 1997).*

No. 102 *Marine farm planning and consultation processes in Western Australia. Dave Everall (August 1997).*

No. 103 *Future management of the aquatic charter industry in Western Australia by the Tour Operators Fishing Working Group (September 1997).*

No. 104 *Management of the Houtman Abrolhos System (draft). Prepared by the Abrolhos Islands Management Advisory Committee in conjunction with Fisheries Western Australia (October 1997).*

No. 105 *Plan for the Management of the Houtman Abrolhos Fish Habitat Protection Area (draft). Prepared by the Abrolhos Islands Management Advisory Committee in conjunction with Fisheries Western Australia (October 1997).*

No. 106 *The impact of Occupational Safety and Health on the management of Western Australian Fisheries. Cameron Wilson (in press).*

No. 107 *The Aquaculture of non-endemic species in Western Australia – Silver Perch (Bidyanus bidyanus). Tina Thorne (June 1997).*

No. 108 *Issues affecting Western Australia's in shore crab fishery – Blue swimmer crab (Portunus pelagicus), Sand crab (Ovalipes australiensis). Cathy Campbell (September 1997).*

No. 109 *Abalone Aquaculture in Western Australia. Cameron Westaway & Jeff Norris (October 1997).*

No. 110 *Porposed Voluntary Fishery Adjustment Scheme – South Coast Purse Seine Managed Fishery Report by Committee of Management (October 1997).*

No. 111 *Management Options for Pilbara Demersal Line Fishing. Gaye Looby (December 1997).*

No. 112 *Summary of Submissions to Fisheries Management Paper No. 108 – issues affecting Western Australia's inshore crab fishery. Compiled by Cathy Campbell (April 1998).*

No. 113 *Western Rock Lobster Management – Options and Issues. Prepared by Kevin Donohue on behalf of the Rock Lobster Industry Advisory Committee. (June 1998).*

No. 114 *A Strategy for the Future Management of the Joint Authority Northern Shark Fishery. Prepared by Tim Bray and Jo Kennedy. (June 1998).*

No. 115 *Guidelines for granting Aquaculture Leases. Prepared by Fisheries WA, the Aquaculture Development Council & the Aquaculture Council of WA. (July 1998).*

No. 116 *Future Management of the Aquatic Charter Industry in Western Australia – Final Report. By the Tour Operators Fishing Working Group (September 1998).*

No. 117 *Management of the Houtman Abrolhos System. Prepared by the Abrolhos Islands Management Advisory Committee in conjunction with Fisheries Western Australia. (In press).*

No. 118 *Plan for the Management of the Houtman Abrolhos Islands Fish Habitat Protection Area (Schedule 1) (In press).*