Study Plan

Independent Study of the Tasmanian Salmon Industry

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Version	Publication Date	Notes
1	May 2026	Draft Study Plan publicly exhibited May to July. Draft Stakeholder Engagement Plan set out in a separate document.
2	October 2026	Updated to merge the draft Study Plan and Stakeholder Engagement Plan into a single document, revise study questions, methodology and take into account public submissions.

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Preface

Study Leads: Dr Wendy Craik AM and Dr Russell Reichelt AO

This Study Plan (Oct 2026) explains how the Independent Study of the Tasmanian Salmon Industry (**the Study**) will address the Terms of Reference (Appendix A). It sets out the Study's scope, methodology, governance, engagement approach and intended outputs. This document combines what were previously two separate publications (the draft Study Plan and the Stakeholder Engagement Plan) into a single document, reflecting that the research topics and engagement approach are one integrated exercise.

The draft Study Plan and draft Stakeholder Engagement Plan were published for public comment from 26 May to 5 July 2026. We received more than 90 carefully considered written submissions and are grateful to their authors for the time and effort invested. These submissions provide a rich source of stakeholder evidence and perspectives that has informed this revised Study Plan and will form part of the Study's evidence base.

The Study will be guided by the Terms of Reference, including its reference to the Tasmanian Resource Management and Planning System legislation. Reports will synthesise the available evidence, identify material gaps, and develop findings on the industry's social, economic and environmental impacts and contributions, its regulation and management and potential future.

In 20 years, the industry has grown from a small-scale Australian owned company harvesting 14,500 tonnes of *Salmo salar* (Atlantic Salmon) in 2003–04, to a large-scale operation of 3 internationally-owned companies harvesting 74,250 tonnes in 2025-26. Salmon are fed in floating, open-net sea cages (commonly called salmon pens or net pens) anchored in Tasmanian coastal waters. These activities are regulated primarily by Tasmanian laws administered by the Department of Natural Resources and Environment and the Environment Protection Authority.

Public submissions on the draft Study Plan in July 2026 focused on multiple issues. Concerns included light pollution and potential health risks from low-frequency noise associated with 24-hour onshore and near-shore operations. There were calls to modify salmon farming methods to prevent the release of organic waste and chemicals, including antibiotics that may contribute to antimicrobial resistance, and related risks to the region's flora and fauna. Submissions also raised the mass salmon deaths in the lower D'Entrecasteaux Channel in 2025, caused by a bacterial pathogen and described by the EPA as large and unprecedented in scale. Other issues included impacts on threatened species and changes in giant kelp forests, and concerns that the environmental impacts of salmon farms affect recreational and commercial fishing, tourism and recreational use of the area, and the lack of timely, transparent information regarding significant incidents and potential health risks. Some suggested moving salmon farms further offshore or to onshore facilities, while others called for salmon farming to be removed from Tasmania entirely.

Concerns extended beyond environmental impacts to ethical questions about fish-feed sourcing and the risk that long-term harm to coastal waterways and biodiversity may be

amplified by broader ocean changes associated with global warming that are beyond the control of government regulation.

We acknowledge the intensity of views about salmon farming and the legitimacy of the concerns raised. We also recognise the importance of Tasmania's history and existing knowledge of salmon farming, and the knowledge and lived experience of communities, Tasmanian Aboriginal people, industry participants and others whose lives, livelihoods and environments intersect with the industry. The Study will consider these perspectives alongside scientific, technical and other evidence. We aim to assess the scientific basis for environmental assessments and to identify where scientific knowledge is not yet sufficient to produce a strongly founded risk assessment. This work will identify impacts on the environment, whether those risks can be mitigated and by how much, and whether damage can be reversed through restoration.

A prevailing concern raised in written submissions was that the Study presupposes the continued operation of the salmon industry in Tasmania in its current or an expanded form. It does not. Our responsibility as independent Study Leads is to undertake the Study in accordance with its Terms of Reference, including to consider the effectiveness of regulation and management in achieving sustainable outcomes for Tasmania's natural and physical resources, consistent with the objectives of the Resource Management Planning System. We approach that task without a predetermined view about the Study's findings or recommendations. Our findings, and any recommendations arising from them, will be guided by the evidence.

This revised Study Plan reflects what we have heard and know to date. It is not intended to constrain the Study from following the evidence as it develops. The Study Plan may continue to evolve where new evidence, stakeholder input or emerging issues indicate that a different or additional line of inquiry is warranted. Any material changes will be made transparent to the public.

1. Introduction, objective and purpose

On 17 August 2025, the Premier, the Minister for Primary Industries and Water, and the Minister for Environment announced that the Tasmanian Government would launch an independent study of the salmon industry. The Independent Study of the Tasmanian Salmon Industry (the Study) formally commenced on 27 February 2026, following the appointment of Dr Wendy Craik AM and Dr Russell Reichelt AO as the Study Leads.

The objective of the Study, as set out in the Terms of Reference (Appendix A), is:

- To undertake a comprehensive independent study of the Tasmanian salmon industry that considers the effectiveness of regulation and management in achieving sustainable outcomes for Tasmania's natural and physical resources, consistent with Tasmania's Resource Management and Planning System.

Building on previous inquiries, existing scientific literature and other relevant evidence, the Study will establish a comprehensive evidence base concerning the industry's social, economic and environmental impacts and contributions; contemporary regulatory frameworks and management practices; and relevant international experience.

The Terms of Reference state the Study must address the following:

- **Impact analysis** Consider and present the evidence associated with the impacts and benefits of the salmon industry in Tasmania across environment, social, economic and scientific areas
- **Regulatory and management framework** Benchmark the adequacy, transparency and enforcement of the regulatory framework governing the Tasmanian salmon industry against other jurisdictions internationally
- **Future opportunities and challenges** Consider emerging opportunities and risks for future industry development
- **Regulatory costs** Assess the appropriateness of the cost recovery model for regulation of the Tasmanian salmon industry, and whether the costs and benefits to Tasmania are fully considered and, where relevant, recovered.

The Study will help inform future policy decisions that seek to balance a sustainable industry with positive outcomes for the Tasmanian environment and community.

Tasmania's Resource Management and Planning System (RMPS)

The Resource Management and Planning System is a framework of legislation, policies, plans and strategies governing land use and development in Tasmania.

The **Objectives** of the resource management and planning system of Tasmania are –

(a) to promote the sustainable development of natural and physical resources and the maintenance of ecological processes and genetic diversity; and

(b) to provide for the fair, orderly and sustainable use and development of air, land and water; and

(c) to encourage public involvement in resource management and planning; and

(d) to facilitate economic development in accordance with the objectives set out in paragraphs (a), (b) and (c); and

(e) to promote the sharing of responsibility for resource management and planning between the different spheres of Government, the community and industry in the State.

The RMPS was developed with the following **Principles** to guide decision making about resource use.

1. **Inter-generational equity** Resource use decisions should be made considering the needs of future generations
2. **Conservation of biodiversity** This requires that we maintain community, species and genetic diversity
3. **Precautionary approach** Where there is uncertainty about the potential impact upon the environment, decisions should err on the side of caution
4. **Social equity** Private use or development of resources must consider the wider social costs
5. **Efficiency** Resources must be used efficiently
6. **Community participation** The community should be involved in establishing the parameters for the use and development of resources

2. Guiding principles

The following principles above govern how the Study will be conducted, including its research, engagement and decision-making processes.

The objectives and principles of Tasmania's Resource Management and Planning System (**RMPS**) provide the substantive framework for assessing the effectiveness of current regulation and management and for developing findings and any recommendations. Neither set of principles predetermines the Study's conclusions.

Transparency

All formal meetings and stakeholder interactions will be recorded in a public "Open Diary" on the Study website, including an outline of topics discussed. Consistent with the Terms of Reference, all evidence, data, submissions and findings will be made publicly available unless bound by commercial confidentiality or competition law.

Requests for confidentiality will be assessed having regard to the principles of the *Right to Information Act 2009*, the nature of the information, the public interest in transparency and applicable legal obligations. Any confidentiality arrangements made by the Study cannot override a legal obligation to disclose information.

Evidence-based

The Study will consider scientific and technical evidence, expert advice, cultural and local knowledge, lived experience, professional and operational experience, and community observations. Each source will be assessed using criteria appropriate to its nature and purpose. Scientific and technical claims will be assessed for methodological quality, reliability and applicability; factual and experiential claims for their basis, relevance and corroboration; and values and preferences will be identified transparently rather than treated as empirical claims. Findings and recommendations will explain how evidence has been weighed, how conflicting evidence has been addressed, and where material gaps or uncertainty remain.

Independence

The Study Leads independently direct the Study, including its methodology, evidence gathering and analysis, stakeholder engagement, and the development of findings and recommendations. The Study Leads are supported by a Secretariat function shared between EMM Consulting and the Department of Premier and Cabinet (DPAC):

- EMM Consulting provides professional analytical and drafting support to the Study Leads, including evidence collection and management, stakeholder engagement coordination, and Advisory Group support.
- DPAC provides government-facing and administrative support, including agency liaison, procurement and budget administration, receipt of public submissions, and coordination of the Study's official publication.

All Secretariat functions operate under the direction of, and are subject to final approval by, the Study Leads, who retain sole responsibility for the Study's findings, conclusions and recommendations.

Inclusivity and safety

Engagement will seek a broad cross-section of the Tasmanian community and seek to provide accessible and culturally appropriate opportunities to participate. Stakeholders may request anonymity or confidential treatment of information where appropriate, so that they can contribute without fear of reprisal, subject to the arrangements described in section 6.

The Study will distinguish between confidential source material and the evidence that can be relied on publicly, and carefully manage any material limitations this creates.

3. Governance, roles and independence

The Study Leads are responsible for selecting the expertise required to deliver the Study and for managing actual, potential and perceived conflicts of interest. Relevant interests and funding relationships of the Study Leads, Advisory Group members, research partners and experts will be declared publicly on the Study website. Independence will be assessed in relation to each person's role, the nature of any interest and the safeguards required.

Entity	Responsibilities and accountability
Study Leads	Dr Craik and Dr Reichelt have ultimate responsibility for the conduct of the Study, ensuring independence and alignment with its objectives. Responsibility for all Study decisions, findings, conclusions and recommendations rests solely with the Study Leads.
Advisory Group	The Study Leads have identified and engaged a small and diverse group of independent experts to form the Advisory Group. The Advisory Group is advisory only: it does not direct, oversee, approve or decide any matter on behalf of the Study. The Study Leads co-chair the Advisory Group.
Research Partners	Provide specialist research, analysis and peer input commissioned by the Study Leads. Their work is subject to the Study methodology, quality assurance requirements and final approval by the Study Leads. The names of research partners, relevant institutions and declared interests are published.
Independent Secretariat / Study Support	EMM Consulting provides day-to-day independent Secretariat support to the Study Leads, including Study planning, milestone and workstream coordination, Advisory Group support, stakeholder-engagement planning, risk and issue management, budget monitoring and report-drafting support.
Department of Premier and Cabinet (DPAC)	Provides government-facing and administrative support, including agency liaison, procurement and budget administration, receipt of public submissions, executive briefings, publication coordination, and Tasmania-based scheduling and travel logistics. DPAC does not direct the Study's methodology, analysis, findings or recommendations.
Government agencies	Provide information, data and access to relevant regulatory, scientific and operational expertise when requested. Agencies may assist with introductions or logistics but do not control who the Study consults or the conclusions it reaches.

4. Study plan

The Study will be delivered in two connected phases. Phase 1 will consolidate and test the evidence base. Phase 2 will assess that evidence against the Terms of Reference and the objectives and principles of the RMPS, then develop findings and any recommendations. Engagement, quality assurance and assessment of new evidence will continue across both phases. This Study Plan may be updated where new evidence, stakeholder input or emerging issues warrant a different or additional line of inquiry; any material change will be published.

Phase 1: Consolidate expert evidence

Output: A series of publicly available information papers.

Focus and objectives: Consolidating and presenting expert evidence on the social, environmental and economic impacts and benefits of the Tasmanian salmon industry, including materials from previous Tasmanian and national inquiries to provide a trusted evidence base for future regulatory and policy settings.

Key questions

1. Global overview

1. **Global production volumes**

- What are the current global production volumes of salmon, how do these contribute to global demand for protein, and how has market share of major producing nations shifted over the last decade?

2. **Global market and change drivers**

- What global commercial, policy, trade, environmental, climate change drivers are reshaping the industry, and how?

3. **Competitive advantage**

- What is Tasmania's competitive advantage globally?

2. Regulatory frameworks

1. **Overarching regulatory framework**

- Overview of the RMPS and how the Salmon industry is regulated in Tasmania.

2. **Incident management and response**

- How are significant incidents reported, assessed, managed and communicated and how does this compare to other jurisdictions?

3. **Monitoring and disclosures**

- What monitoring, reporting and disclosures are required and how does this compare to other jurisdictions?

4. **Public participation**

- How do regulatory frameworks encourage public involvement and the sharing of responsibility for resource management, and how does this compare to other jurisdictions?

5. **Oversight and enforcement**

- What is the nature of regulatory oversight and enforcement and how does this compare to other jurisdictions?

6. **Cost recovery**

- What cost recovery frameworks are in place and how does this compare to other jurisdictions?

3. Ecosystems and salmon health

1. **Environmental values and marine impacts in Tasmania**

- What natural values in Tasmania are affected by salmon farming?
- What is the current state of benthic and water column health, and what measurable impacts (including nitrogen and nutrient loading) does salmon farming have on marine biodiversity (distinguished from impacts of other human activity in the same waters)?
- How do waste management protocols for hatchery sludge and marine mortalities compare to international standards?
- What are the key risks and impacts associated with biofouling and how are these managed?

2. **Salmon health and mortality record in Tasmania**

- What are the primary causes of salmon mortality, what are the prevention strategies and how do management practices compare to international welfare standards?
- What were the findings of the multi-agency debrief following the 2025 D'Entrecasteaux channel mortality event?
- What are the trends in antibiotic and chemical use in Tasmania, and what environmental and public health risks (including multidrug antimicrobial resistant genes) arise in relation to this use?

3. **Wildlife interactions in Tasmania**

- What is the nature and frequency of wildlife interactions (seals, birds, skates) with salmon farming operations?
- What mitigation strategies are used and how does this compare to international practices?

4. **Terrestrial and freshwater impacts**

- What impacts do terrestrial and freshwater hatchery operations have on local river systems and groundwater?

4. People and communities

1. **Economic and social impacts**

- What are the economic and social contributions and impacts of the Salmon industry in Tasmania? E.g.:
    - gross state product, training, education & employment, infrastructure, research & innovation
    - coastal amenity (noise, light, visual amenity, air quality)
    - other sectors (e.g. local fishing, tourism, recreation).

2. **Aboriginal values and opportunities**

- What are the opportunities for and impacts on Sea Country and Aboriginal communities?

3. **Community sentiment**

- What are the views of the Tasmanian community about the industry's social licence and why?

Methodology and timelines

Each information paper will define its questions and scope; identify and appraise relevant evidence; document areas of agreement, disagreement and uncertainty; and state relevant data gaps. Draft papers will be independently reviewed where appropriate and published for comment. Final papers will form the principal evidence base for Phase 2.

- **Assemble evidence base** (desktop study, expert interviews)
- **Consolidate and test evidence base** (peer review, roundtables)
- **Prepare draft evidence base** (methodology, findings, uncertainties)
- **Public exhibition** (public submissions)
- **Review and finalise** (peer review, targeted roundtables)
- **Publish evidence base**

The initial listening phase provides an open, time-limited opportunity for stakeholders to meet directly with the Study Leads during the early evidence-gathering stage. It will aim to conclude in December 2026. Targeted meetings, public webinars, written input, field visits, workshops and other engagement will continue throughout both phases of the Study.

Phase 1 information papers will be:

- published for public exhibition progressively between November 2026 and January 2027
- progressively finalised between January and April 2027.

Phase 2: Advice on a contemporary regulatory framework and future opportunities

Output: Findings and recommendations to the Tasmanian Government on the effectiveness of regulation and management in achieving sustainable outcomes for Tasmania's natural and physical resources, consistent with Tasmania's Resource Management and Planning System.

Focus and objectives: Based on the evidence base established in Phase 1, provide expert advice on:

- the risks and benefits of the salmon industry in Tasmania,
- the appropriateness of the cost recovery model for regulation of the industry, and whether the costs and benefits to Tasmania are fully considered and, where relevant, recovered,
- the contemporary regulatory framework required to manage the opportunities and risks for the industry, the community and the environment,
- the technical and financial feasibility of alternative production models — including land-based recirculating aquaculture systems (RAS), offshore systems, and hybrid models — and opportunities to strengthen value-added production, downstream processing and emerging bioproducts;
- examples of international best practice and advice on strategic directions for the industry.

Key questions

Phase 2 will address the following questions:

How effective is the current regulation and management of the salmon industry in achieving sustainable outcomes consistent with the principles and objectives of the RMPS, having regard to:

1. the risks and benefits of the Tasmanian salmon industry and international best practice
2. the current cost recovery model for salmon industry regulation
3. the feasibility of alternative production models.

These questions, and any further analysis required to meet the Study's objective, may be refined after the Phase 1 evidence base and public feedback have been considered. Any material refinement will be explained publicly.

Methodology and timelines

Phase 2 will synthesise the final Phase 1 information papers, assess the evidence against the Terms of Reference and the RMPS framework, and develop draft findings and any recommendations. Draft findings and recommendations will be released for public comment before the final report is completed.

- **May to July 2027:** Develop findings and recommendations
- **August 2027:** Prepare draft report
- **September 2027:** Public exhibition of draft report
- **October 2027:** Consider feedback
- **November 2027:** Prepare final report
- **December 2027:** Publish final report

Ongoing engagement

Engagement will occur throughout delivery of the Study and will not be confined to particular consultation periods. The Study Leads will maintain periodic engagement with stakeholders, including independent scientists, researchers and community representatives, to hear emerging perspectives, identify relevant evidence and follow up matters requiring further exploration. This will help ensure that the Study continues to hear a diverse range of perspectives, including perspectives beyond government and industry. Stakeholder engagement will inform the Study's understanding and evidence base, while responsibility for the Study's findings and recommendations will remain with the independent Study Leads.

How will different information be assessed?

All evidence will be considered for Tasmanian applicability (relevance to Tasmania's specific conditions), currency (how recent the evidence is, and whether circumstances have since changed), and corroboration (whether the claim is supported by other independent sources and any areas of disagreement). Independence and source of funding will also be noted, where information is available.

The table below sets out additional assessment approaches that may be adopted for different types of evidence.

Information Type	Assessment Approach
Factual claims	Verification against available evidence and datasets
Scientific and technical evidence	Assessment of methodology, quality, materiality, peer review, and reproducibility
Professional and operational experience	Assessment of relevance, consistency and supporting evidence
Community and Indigenous knowledge	Assessment of consistency, corroboration and relevance to local conditions
Value judgements and preferences	Documentation and consideration in evaluating future options and trade-offs

5. Study Milestones

The Study was announced in August 2025 and formally commenced in February 2026. During 2026 and 2027 it will progress through establishment and initial engagement; preparation, exhibition and finalisation of Phase 1 information papers; Phase 2 assessment and consultation on draft findings and recommendations; and publication of the final report. Current milestone information and any material changes to sequencing will be published on the Study website

Establishment

August 2025

Independent study of the salmon industry announced

October 2025

Terms of reference released

February 2026

Joint study leads appointed

May – July 2026

Consultation on stakeholder engagement and study plans

August – September 2026

Consider submissions & revise study plan

October 2026

Revised study plan published

Delivery

August – December 2026

Study Leads initial listening phase

October 2026

Phase 1 research commissioned

April 2027

Phase 1 research complete

May – August 2027

Develop Phase 2 findings and recommendations

September 2027

Consultation on draft Phase 2 report

November 2027

Finalise Phase 2 report

December 2027

Deliver final report to the Tasmanian Government

6. How to get involved

Anyone with relevant knowledge, experience or views may participate in the Study. You can register for updates, provide written input when submissions are invited, request engagement with the Study team, attend public webinars and follow published progress updates. The Study Leads will also proactively engage the stakeholder groups listed below.

Registering for updates

Public information will be published on the Salmon Industry Study website, www.tas.gov.au/salmon-industry-study. Stakeholders may register on the website to receive email updates as the Study progresses, new information is published, and opportunities for input and feedback are invited.

To support transparency and keep the community informed, monthly progress updates on the Independent Study of the Tasmanian Salmon Industry will be published on the Study website. These updates will provide information on key activities undertaken by the Study, progress against planned milestones, and upcoming work.

Providing written input

The Study will notify stakeholders when written submissions are invited and the Study Leads are open to receiving other written input at other times. Unless confidentiality is requested and accepted, submissions will be treated as public information and published on the Study website. The author's name, or the name of the organisation represented, will also be published unless anonymity is requested.

Requests for confidentiality must be made in writing when the submission is provided, identify the information concerned and explain the basis for the request. The Study will assess requests having regard to the nature of the information, the public interest in transparency, applicable legal obligations and the principles of the *Right to Information Act 2009*. If a request is accepted, the Study will manage and publish the information consistently with that arrangement, subject to any legal obligation requiring disclosure.

Copyright in submissions remains with the author or authors, not with the Study Leads or the Tasmanian Government. Submissions containing defamatory or offensive material will not be published, in whole or in part. If a submission includes information that could enable the identification of other people, parts or all of the submission may not be published.

Meeting and engaging with the Study

The initial Listening phase is an open opportunity for individuals and organisations to meet directly with the Study Leads and share relevant views and experience. Any person or organisation may request a 30-minute online meeting until 18 December 2026. Consistent with the Transparency principle, the Open Diary will record stakeholder meetings and summarise the topics discussed, subject to appropriate privacy and confidentiality protections.

Stakeholder engagement will continue beyond the Listening phase. The Study Leads may invite stakeholders to participate in further meetings, workshops, roundtables and other engagement activities as the Study progresses.

Any requests to engage with the Study can be forwarded to salmonstudy@emmconsulting.com.au.

Webinars and other engagement activities

Engagement will continue throughout the Study and will be matched to the issue, stage and participants. It will include direct stakeholder meetings, invitations for written input, field visits, workshops and roundtables, and public webinars. The Study will provide public webinars at the following stages:

- a webinar on the early and evolving evidence from Phase 1;
- a webinar as the Study moves into Phase 2, explaining the proposed approach and methodology for considering the Phase 1 evidence and developing the Study's findings and any recommendations;
- a webinar on the draft report and findings and recommendations arising from Phase 2; and
- a webinar on the final report.

Study visits

The Study Leads will undertake industry and community study visits to better understand the places, activities and communities relevant to the Study. Community engagement will include face-to-face meetings with a selection of community members and organisations, recognising that it will not be possible to meet in person with all interested individuals and organisations.

Proactive engagement

The Study Leads will also proactively engage a broad range of stakeholders with relevant knowledge, experience and perspectives, including the groups below. The Study also welcomes input from individuals with personal, professional or public-interest views who may not identify with a particular stakeholder group.

Stakeholder group	Rationale for engagement
Regional and coastal communities	To understand local impacts and benefits on amenity, infrastructure, regional economy, employment and community wellbeing, including recreational fishing, other marine environment users and environmental appreciation.
Tasmanian Aboriginal people and organisations	To incorporate Aboriginal knowledge and address impacts on Sea Country and cultural heritage.
Salmon industry and supply chain (commercial)	To gather data on industry operations, economic contributions and technical innovations (Salmon Tasmania, major operators — Tassal, Huon Aquaculture, Petuna;

Stakeholder group	Rationale for engagement
	supply-chain stakeholders), international salmon farming expertise.
Industry (workforce)	To capture the perspectives of the workers and families supported by the salmon industry.
Other marine and regional industries	To capture the perspectives of industries that share the same waterways (e.g. tourism, commercial fishing, boating, ports).
Scientific and research community	To access world-leading research from institutions (IMAS, CSIRO, Cawthron Institute) and independent experts in similar roles outside Australia and New Zealand.
Environmental and conservation organisations	To identify environmental and ecosystem health related concerns, and regulatory gaps.
Government agencies and regulators	To assess current management frameworks, compliance data and biosecurity protocols (EPA, NRE, Treasury).
Members of Parliament	To ensure the Study addresses policy concerns and constituent feedback represented in the Tasmanian Parliament.
International peers	To benchmark Tasmanian practices against jurisdictions such as Chile, Norway, Scotland and Canada.

Appendix A: Terms of Reference

Independent Study of the Tasmanian Salmon Industry

Objective

To undertake a comprehensive independent study of the Tasmanian salmon industry that considers the effectiveness of regulation and management in achieving sustainable outcomes for Tasmania's natural and physical resources, consistent with Tasmania's Resource Management and Planning System.

Background

On 17 August 2025, the Premier, the Minister for Primary Industries and Water, and the Minister for Environment announced that the Tasmanian Government will launch an independent study of the salmon industry.

Building on evidence from previous inquiries and existing scientific literature, this study will provide a comprehensive evidence base for consideration of the socio-economic and environmental impacts and contributions of the industry, contemporary regulatory frameworks and management practices and international benchmarking.

The study will help inform future policy decisions that seek to balance a sustainable industry with positive outcomes for the Tasmanian environment and community.

Terms of Reference

1.0 Impact Analysis

The study is to consider and present the evidence associated with the impacts and benefits of the salmon industry in Tasmania across the following areas.

1.1 Environmental

- the impact of salmon farming operations on the environment, including the marine, freshwater and terrestrial environment and associated ecosystems.
- climate change threats, impacts and opportunities for adaptation and carbon management.

1.2 Social, Economic and Scientific

- the social benefits and costs to the Tasmanian community, including the effect of industry activities on infrastructure and amenity.
- the direct and indirect contribution of the salmon industry to the Tasmanian economy, including regional economies.
- the regional distribution of employment opportunities and career pathways, and the industry's role in developing skills and knowledge.

- the contribution of the industry to advancing scientific expertise, innovation and research capacity in Tasmania, including aquaculture science, technology, environmental monitoring, and biosecurity.

2.0 Regulatory and Management Framework

The study will benchmark the adequacy, transparency, and enforcement of the regulatory framework governing the Tasmanian salmon industry against other jurisdictions internationally, with particular regard to:

- The adequacy of regulations to balance sustainable industry development with positive outcomes for the Tasmanian environment and community, including:
    - The calculation and use of metrics such as stocking density, biomass, feed input, and total permissible dissolved nitrogen output as controls to ensure the effects of salmon farming operations are within the assimilative capacity of the environment.
    - The impacts of hatchery and farm discharges.
    - The adequacy of biosecurity arrangements to prevent and effectively manage disease outbreaks and mass mortality events.
    - The effectiveness of regulations in managing interactions between fish farms and native wildlife, and the extent to which these are consistent with animal welfare regulations.
    - Any other impacts on the health and welfare of animals and human health.
- Whether existing and planned monitoring, compliance and enforcement mechanisms are rigorous, timely and aligned with adaptive management principles.
- The adequacy of penalties for non-compliance with regulations in terms of both scope and scale.

The study should consider the outcomes of the multi-agency debrief following the 2025 salmon mortality event in the D'Entrecasteaux Channel and consider what changes, if any, are required to disease monitoring, management and mass mortality response practices.

3.0 Future Opportunities and Challenges

The study will consider emerging opportunities and risks for future industry development, including but not limited to:

- The technical and financial feasibility of alternative production models to address any identified environmental or social issues while supporting economic and regional development, including:
    - land-based recirculating aquaculture systems (RAS)
    - Hybrid (RAS/Offshore) production models
- Opportunities to strengthen value-added production, downstream processing and emerging bioproducts that support regional economies.

- The impacts of climate change on both the industry and the ecosystem in which it operates.

4.0 Regulatory Costs

Assess the appropriateness of the cost recovery model for regulation of the Tasmanian salmon industry, and whether the costs and benefits to Tasmania are being fully considered, and where relevant, recovered.

Study Process and Structure

The study is to be undertaken in a manner that supports active engagement with the Tasmanian community, industry, the science community and Members of Parliament. The study will be conducted by an independent off island specialist with appropriate credentials and reputation (Study Lead).

The Study Lead will be supported by experts, with relevant knowledge and experience in the matters to be considered in the study. The range of experts to be made available will be agreed with the Study Lead in the early stages of the study design.

Any experts or organisations undertaking the study and the Study Lead must be independent from any research institution receiving funding from the salmon industry. All actual or perceived conflicts for the Study Lead and experts will be publicly declared.

The Study Lead is to produce and release a stakeholder engagement plan during the early stages of the study.

The study should have regard to previous bodies of science and reviews/inquiries, including recommendations and responses of the State Government.

It is expected that the Study Lead will identify individuals and organisations that, in the Study Lead's opinion, can actively contribute evidence to support the Objective and Terms of Reference of the Study. Stakeholders will be given the option to provide input anonymously. All material relied on for finding or recommendations of the study will, however, be based on verifiable evidence and sources.

The analysis should, where relevant, include comparisons with industry internationally, including in Norway, Chile, Scotland, Canada and New Zealand.

Unless bound by commercial confidentiality or competition law, all evidence, data, and findings will be made publicly available to promote transparency and accountability.

The Independent Study is to be conducted in two phases:

- **Phase 1** will focus on consolidating and presenting expert evidence on the social, environmental and economic impacts and benefits of the Tasmanian salmon industry, including materials associated with previous Tasmanian and national inquiries.

  The objectives of Phase 1 will be to provide a trusted evidence base for considering future regulatory and policy settings, and to minimise the degree of contested views on the industry, its impacts and its regulation.

The output from Phase 1 will be one, or a series of publicly available information papers covering the range of issues to be considered in the study. It is anticipated that this phase of the study will be completed within 12 months of commissioning.

- **Phase 2** will build on the work of Phase 1, providing expert advice on the risks and benefits of the salmon industry in Tasmania and the contemporary regulatory framework required for managing the opportunities and risks for the industry, the community and the environment.

  It should include examples of international best-practice and advice on the strategic directions for the Tasmanian salmon industry.

  Phase 2 should include an analysis of the feasibility of future opportunities, such as offshore or land-based production models for the industry.

The Phase 1 and Phase 2 reports will include findings and recommendations to Government that support the Objective of the study.

It is expected that the Study Lead will confirm delivery timeframes for both phases of the study and completion of the final report with the Tasmanian Parliament and broader Tasmanian community.