



# ALL-ATLANTIC OCEAN RESEARCH ALLIANCE

Creating an Atlantic Ocean Community by Implementing  
the Galway and Belém Statements

## AA-ATiP Report:

1. Identification and engagement of stakeholders
2. Facilitation of brokerage events
3. Roadmap for the development and long-term sustainability of BrATiP



BUILDING AN ALL ATLANTIC  
OCEAN COMMUNITY  
Implementing the Belém Statement



# ALL-ATLANTIC OCEAN RESEARCH ALLIANCE

Creating an Atlantic Ocean Community by Implementing the Galway and Belém Statements



## Report Identifier

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# ALL-ATLANTIC OCEAN RESEARCH ALLIANCE

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## JOINT PILOT ACTIONS

### ALL-ATLANTIC JOINT PILOT ACTIONS

Following a year-long collaborative process among more than 70 stakeholders at the Atlantic level, the All-Atlantic Ocean Research Alliance Multi-Stakeholder Platform, divided into 5 sub-multi-stakeholders platforms, identified more than 1000 initiatives towards strengthening marine research and innovation collaboration at the Atlantic level, 56 gaps and 79 needs/recommendations to achieve the All-Atlantic Ocean Research Alliance ambition, guided by a total of 20 Strategic Objectives, 20 Operational Objectives, and 10 Key Performance Indicators.

Based on these findings and on the idea of collaboration, alignment, and use of existing resources, they have developed six ambitious and long-term collaborative Joint Pilot Actions:

- [All-Atlantic Training Platform \(AA-TP\)](#)
- [All-Atlantic Aquaculture Technology and Innovation Platform \(AA-ATiP\)](#)
- [All-Atlantic Marine Biotechnology Initiative \(AA-BIOTECMAR\)](#)
- [All-Atlantic Data Enterprise 2030 \(AA-DATA2030\)](#)
- [All-Atlantic Blue Schools Network \(AA-BSN\)](#)
- [All-Atlantic Marine Research Infrastructure Network \(AA-MARINET\)](#)

This report is developed by the **All-Atlantic Aquaculture Technology and Innovation Platform (AA-ATiP)** Joint Pilot Action, which is considering the steps required in the design, implementation, and management of a multi-stakeholder All-Atlantic Aquaculture Platform, following the principles of collaboration, cooperation and shared Ocean resources. A roadmap for the strategic progress of the aquaculture sector among the All-Atlantic Ocean Research Alliance partners will be developed with engaged stakeholders working towards identified strategic research and innovation agendas for national sustainable aquaculture development.

This report is a deliverable in scope of AA-TiP's tasks 1 - Identification and Engagement of key Stakeholders in Aquaculture; 2 - Facilitation of Brokerage event; and 3 - RoadMap for the development and long-term sustainability of BrATiP, with reference to an All-Atlantic Aquaculture Platform.

Due to the AANCHOR project extension and savings made in the execution of Task 2, permission was sought and granted for an Additional Task 4, a further brokerage event in South Africa. This event took place in November 2022 in Cape Town, South Africa, and included joining a technical tour in Hermanus in conjunction with the ASTRAL and AquaVitae projects. Reference is made to this additional task at the end of this report.





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## SUMMARY

### SUMMARY

First conceived in the spring of 2020, a Joint Pilot Action (JPA) within the AANChOR CSA to consider the desire for and viability of a multi-stakeholder platform for the Brazilian aquaculture sector was formally commissioned in the spring of 2021. Re-branded AA-ATiP – All-Atlantic Aquaculture Technology and Innovation Platform, the key tasks remained unaltered:

- Task 1 – Stakeholder identification and mapping.
- Task 2 – In person brokerage event, Brazil (including invited stakeholders from South Africa)
- Task 3 – Roadmap development and recommendations.

Further to the AANChOR project extension and the ability to incur costs until January 31<sup>st</sup> 2023 being approved, an additional task was requested of and approved by the project management and project officer:

- Task 4 – In person brokerage event, South Africa.

All tasks have been successfully completed and are reported on within this document. The only exception is for a full report on Task 4, which at the time of the submission of this report still awaits sign off from within South African Government. This report will be made available to the AANChOR management as soon as possible. The methodology and agenda for Task 4 are listed at the end of this report.

In terms of Atlantic collaboration with Brazil and South African this JPA concludes:

All stakeholders and participants in AA-ATiP believe and agree the establishment of a Brazilian and South African multi-stakeholder platform focussing on research and innovation needs is wanted, beneficial, relevant and timely. The benefits and application to wider international research and innovation collaboration is understood and acknowledged as highly desirable.

Furthermore, through the work of this joint action, thematic areas for prioritisation have been identified, at least in the first instance; representative, trusted founder stakeholder members to drive the platform(s) forward have been identified; issues to resolve and to consider further in order for progress to be made have been listed; necessary partners / collaborators / other stakeholder have been identified, specifically with regard to other national plans or strategies and challenges, principally with regard to funding, governance and duplication of effort / infrastructure have been acknowledged.

All parties look forward to progressing this work into the future.



## I. Identification and Engagement of key Stakeholders in Aquaculture

### 1.1. Activities performed for stakeholder identification

Task 1 as set out in the JPA proposal required stakeholder identification for subsequent participation in the JPA brokerage event (Task 2) and to provide a network of contacts within the Atlantic aquaculture community. To this extent, a programme of stakeholder mapping and consultation / outreach was undertaken to draw up a thorough, multi-stakeholder representation of the aquaculture sector in both Brazil and South Africa.

#### **Principles of stakeholder mapping.**

Throughout the stakeholder identification process, certain guiding principles were observed to ensure that the reporting of Task 1 delivered meaningful results. The JPA management agreed that all stakeholders recorded within the exercise should demonstrate understanding of and commitment to the process of multi stakeholder platform development and to have been actively (and personally) contacted and consulted in the JPA exercise; the intention being to ensure a qualitative check on information provided.

It is agreed that identification of active, key, representational stakeholders is more important and beneficial to future progress and platform development than the simple mass reporting of quantitative data – i.e., providing lists of names and organisations mined from directories or mailing lists that have not been directly approached and surveyed. As such, information provided in the Task 1 stakeholder list is considered to be quality and value checked.

Across the aquaculture sector, in Europe, South Africa, Brazil and other Atlantic nations, the majority of aquaculture production businesses are classified as micro (<10 FTE) businesses<sup>1</sup>, with the majority of the remainder being considered SMEs and only a small number of larger, vertically integrated companies operating with a payroll in excess of 250 FTE. As such, rather than produce large lists of stakeholders culled from business registers or directories but providing the contacts for micro producers either unable or uninterested in engaging in the JPA objectives, an agreed position was taken to identify key industry operators including Producer Associations, Trade Associations, co-operatives, friendly societies and other representational organisations for small scale producers. Aquaculture operations with greater resources and personnel, or those individuals known to take an interest in collectivism and / or research and innovation prioritisation have been included in the mapping exercise.

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<sup>1</sup> For example, with regard to EU production, please see: [https://stecf.jrc.ec.europa.eu/reports/economic/-/asset\\_publisher/d71e/document/id/2871698](https://stecf.jrc.ec.europa.eu/reports/economic/-/asset_publisher/d71e/document/id/2871698)



Finally, this task remained open during the lifetime of the JPA, with additional contacts being added to the stakeholder lists as appropriate. This proved especially important given the identification of additional contacts upon the conclusion of the Brokerage events and subsequent gap analysis work that was undertaken.

### **Data Protection.**

During the exercises not all participants gave consent for personal contact information (telephone, e-mail, WhatsApp etc.) to be made available and showed reluctance to be approached by parties external to the direct JPA activity. For this reason, personal contact information has not been made available in this report (and indeed, the GDPR situation remained unclear within the European Union context). However, a record of contact information is maintained by the JPA lead (and national contacts within South Africa and Brazil) and it available for subsequent work in developing the national platforms and working towards the establishment of future actions – e.g., in the field of research collaboration or international mobility.

### **Methodology.**

In order to undertake the stakeholder mapping a number of different approaches were taken. The JPA undertook an “open door” approach, with no individual or organisation being ruled out of participation or relevance, in recognition of the multi-stakeholder approach that is essential to the bottom-up approach to platform development. Additional stakeholders were considered (as with the EURASTiP project) in recognition of different interest groups in other regions – e.g., a greater role for co-operatives or syndicates and unions.

Key sectors that were deemed essential for the Brokerage event(s) and any subsequent platform development to be successful included:

- Industry
- Industry Associations
- Industry Value Chain (i.e., Feed, Equipment, Pharmaceuticals, Technical Services, Data Services, etc.)
- Researchers and Research Centres
- Academia
- Government, Regulatory Authorities and Agencies
- NGO Groups & Civil Society Organisations (including Co-operatives, Unions, certification bodies)
- Consultants, named individuals and press contacts.

Surveying and mapping took place at the European, Brazilian and South African levels. The first point of reference was the considerable network experience of the project steering committee members, each with





multiple decades of experience in the aquaculture community and representing multiple fields. Full use was made of the AANChOR network, particularly with regard to sourcing contacts from other Atlantic nations. This latter point is particularly pertinent to contacts from Argentina and Cape Verde, with a request having been made during the Steering Committee meeting of September 2021 for these nations to be included in the scope of the work<sup>2</sup>. National core groups provided invaluable support in the compilation and qualitative assessment of representatives.

At the European level, JPA lead EATiP made significant use of the International Collaboration (INCO) and Mirror Platform (MiP) working groups<sup>3</sup>. These working groups, including participation of 15 national / regional aquaculture clusters (with an outreach in excess of 800 organisations) provided a wealth of contacts through personal connection, prior research activity and collaborations in previous framework programme actions. Industry collaboration and contacts were also provided, with particular reference to NCE Aqautech, Innovation Norway and Chambers of Commerce.

Mapping took place across the JPA through the compilation of personal recommendations and networks, mapping of existing professional relationships, mapping of engagement in research and collaboration actions and projects and cross referencing with other networks (e.g. scientific or industry association members, or existing networks such as BluEcoNet).

The JPA undertook significant outreach through a series of events (mostly online due to Covid 19 regulations) including within the context of the AANChOR project (e.g. High-level scientific events) or national conferences (e.g. Aquaciencia (BR), Aquaculture Europe (EU)).

Furthermore, the JPA approached other relevant projects (e.g. AquaVitae, ASTRAL) working on All Atlantic research whose coordinators proved valuable support and encouragement.

Other international organisations also engaged, including from the NGO sector (e.g. IUCN and WWF).

The JPA lead undertook in-person activities both to promote the JPA to stakeholders and to further improve participation and representation. During two in person visits to Brazil, field trips and site visits were undertaken to make personal contact with aquaculture stakeholders and the JPA was presented at the IFC Conference in November 2021 and again in August/September 2022 (as part of the ASTRAL and BluEconet events taking place there). Visits to exhibiting partners at the associated trade shows secured further interest and contacts.

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<sup>2</sup> Despite significant efforts having been made through the AANChOR network, the AAOYA network and sister projects ASTRAL and AquaVitae, all active in these two countries, no representative was ultimately found with an interest in attending the brokerage event or participating in the work of the JPA.

<sup>3</sup> See: <https://eatip.eu/working-groups/> for further information.



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Stakeholder mapping within South Africa was assisted greatly by the Department for Fisheries, Forestry and the Environment (DFFE), capitalising on recent work that has been undertaken within South Africa in relation to mapping the aquaculture sector.

## 1.2. Stakeholders list

Brazil			
Sector	Organisation <sup>4</sup>	Full Name	Contact Name <sup>5</sup>
Farming Associations	PEIXE BR	Brazilian Fish farmers Association	Francisco das Chagas Medeiros
	CAN	National Agriculture Commission – Aquaculture Sector	Francisco Hidalgo Farina
	ABCC	Brazilian Shrimp Farmers Association	Itamar de Paiva Rocha
	FIESP	São Paulo State Industries Federation – FIESP	Roberto Imai
	FIESP	São Paulo State Industries Federation – FIESP	Sergio Tutui
	Camarão BR	Brazilian shrimp farmers association	Marisa Sonehara
	AMASI	Associação dos Maricultores do Sul da Ilha	Tatiana da Gama Cunha
	Peixe MG	Assoc. de aquicultores e empresas especializadas do estado de Minas Gerais	Jorge Vieira
Farming Associations	AQUAM	Assoc. Independente dos Aquicultores do Estado do Amazonas	Luiz Elder Bonfá

<sup>4</sup> For the purposes of GDPR and comparable national regulations in Atlantic Nations, specific organizational and personal contact information has not been provided within this report. Not all participants in the AA-ATIP outreach provided consent for personal contact details to be shared. However, further details may be provided on request and in the first instance approaches should be made to the JPA lead.

<sup>5</sup> Ibid.



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	ANPAQUI	Assoc. Norte Paranaense de Aquicultores	Creuza
	Peixe SP	Assoc. de Piscicultores em Águas Paulistas e da União	Emerson Esteves
	AQUAMAT	Assoc. dos Aquicultores do Estado de Mato Grosso	Igor Davoglio
	ACEAQ	Assoc. Catarinense de Aquicultura	Ofélia Campignoto
	ACEAQ	Assoc. Cearense de aquicultores	Antônio Albuquerque
<b>Government</b>	MAPA/SAP	Brazilian Aquaculture and Fisheries Secretary	Mauricio Nogueira da Cruz Pessoa
	MAPA/SAP	Brazilian Aquaculture and Fisheries Secretary	Carolina Mendes Costa
	MCTIC	Brazilian Science and Technology Ministry	Karen Silverwood-Cope
	MCTIC	Brazilian Science and Technology Ministry	Claudia Alves de Magalhães
	MCTIC	Brazilian Science and Technology Ministry	Andrei Polejack
	SAR	Santa Catarina State Secretary of Agriculture and Fisheries	Sergio Winckler
	Epagri/CEDAP	Santa Catarina Company of Agropecuary and rural extension	André Luís Tortato
	EMBRAPA	Brazilian Agricultural Research Corporation	Danielle de Bem Luiz
	SEBRAE - DF		Newman Costa
	Bahia Pesca		Marcelo Sampaio Oliveira
<b>Scientific Societies</b>	AQUABIO	Brazilian Society of Aquaculture and Aquatic Biology (AQUABIO)	Cintia Nakayama
	ABRAPOA	Brazilian Society of Aquatic Animal Pathologists	Ricardo Massato Takemoto
<b>Value Chain and Equipment</b>	Fider/MCassab		Juliano Kubitza
	Amaral		Antonio Ramon Amaral Neto





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	Fish Company	Henrique Franco
	BTJ Foods	Felipe Franco
	Damata GMC	Celso Junqueira
	Escama Forte	Alfredo
	Copacol	Valdemir Paulino dos Santos
	Grupo Bom Futuro	Herbert Junior
	Phibro (Aquivet)	Daniel Fuziki
	Brusinox	Daniel Bacca
	Fisher Piscicultura	Alexandre Masocatto Pulino
	MSD Saúde Animal	Rodrigo Zanolo
	Cargill	Reginaldo Gianotto
	DSM	Eduardo Yamashita
	Ammco Pharma	Eduardo Conte
	Alltech	Carolina Farias
	Imeve	Gustavo Costa
	Agricotec	André Nascimento
	Marel Equipamentos	Eduardo Weschenfelder
	Adisseo	Thiago Ushizima
	Agronorte	Vinicius Carvalho
	Nexco	Geraldo Borba Jr
	Zoetis	Danielle Damasceno
	Biovet	Santiago Benites de Pádua
	Textil Sauter	Rodrigo Zampini
	Hipra Saúde Animal	João Moutinho
	Elanco	Mauri Moreira
	C. Vale	Jair de Sordi
	Grupo Motagro (Agrinutre)	Elicio Mota
	Integral Agro	Celso Eichi Nagai
	BRF	Maria Joana Dias
	Pathovet do Brasil	Miguel Alarcon
	Sanphar	Patricia Babadopulos
	FAIBR	Murilo Henrique Quintiliano
	Spring Genetics	Antonia Micaele Pereira Sales
	Inata	Renan Silva de Rossi
	Aquadelta	Eduardo Amorim
<b>Value Chain and Equipment</b>	Engepesca	Marcelo Conolly
	Pancosma	Monica Zordam
	Redemar Alevinos	Cláudia Kerber





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	Especialista em macroalgas		Miguel Sepulveda
	Ocean Minerals		Marcelo Borba
	Ecomarine Biotech		Bruno Scopel
	International Fish Congress		Altemir Gregolin
	NOVAQUA	Projects and applied studies	Eduardo Akifumi Ono
	ALTAMAR	Altamar Sistemas Aquaticos	Marcelo Shei
	AQUABEL/GENOMAR	Tilapia Fingerling Producer	Ricardo Neukirchner
	Trevisan	Equipment provider	Nedyr Chiesa
	INVE do Brasil	Feed industry	Marcos Santos
	Guabi	Feed industry	Joao Manoel Cordeiro Alves
	Acquatropics	Aquaculture engineering services	Marco Aurelio Rotta
<b>Fish, Shrimp, Mollusc Farmers</b>	Delicious Fish		Tiago Saraiva
	Zaltana Pescados		Bruno Leite
	Piscicultura Água Pura		Wagner Camis
	Aquicultura Da Fonte		Ricardo da Fonte Filho
	Colpani Pescados		Martinho Colpani
	NR Trutas		Afonso Vivolo / Mari
	Lakes Fish		Raul Lima
	Cristalina		Mauro Tadashi Nakata
	Maricultura Costa Verde		Kazuo Tonaki
	Produtor moluscos		ábio Brognoli
	SynbiAqua	IMTA Producer	Ana Paula Guerrelhas Teixeira
	Mar do Brasil	Shrimp producer	Giovanni Lemos de Mello
<b>University &amp; Research Centres</b>	UFSC	Federal University of Santa Catarina	José Luiz Mouriño
	UFRPE	Federal Rural University of Pernambuco	Alfredo Olivera
	UNESP	São Paulo State University	Leonardo Takahashi
	FURG	Federal University of Rio Grande	Dariano Krummenauer
<b>University &amp; Research Centres</b>	UNIVALI	University of the Itajai Valley	Gilberto Manzoni
	USP	São Paulo University	Daniel Lemos





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	UFC/LABOMAR	Federal University of Ceará	Rodrigo Maggioni
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	LABOMAR - UFC	Federal University of Ceara	Alberto Nunes
	UFRN	Federal University of Rio Grande do Norte	Rodrigo Carvalho
	APTA-SP		Luiz Ayroza
	EPAGRI	Empresa de Pesquisa Agropecuária e Extensão Rural de Santa Catarina	Felipe Suplicy
	EPAGRI	Empresa de Pesquisa Agropecuária e Extensão Rural de Santa Catarina	Alex Alves dos Santos
	EMBRAPA - Aracaju, SE	The Brazilian Agricultural Research Corporation	Alitieni Pereira
	EMBRAPA - Palmas	The Brazilian Agricultural Research Corporation	Licia Maria Lundstedt
<b>Trade Press</b>	Aquaculture Brasil		Giovanni Lemos
	Panorama da Aquicultura		omar Carvalho
	Seafood Brasil		Ricardo Torres
	25 de julho		Fernanda
<b>Individual Invitations</b>	INATA - Produtos Biologicos		
	HIPRA		Erik Diaz Gondra
	HIPRA		Joao Felipe Moutinho
	HIPRA		Raul Benito
	ADISSEO		Thiago Ushizima
	AYAMO Global Foods		Vinicius Zucco Orsi
	UFSC		Monica Yumi Tsuzuki
	UFSC	AA-BIOTECMAR Synergy	Luciane M Perazzolo
<b>Individual Invitations</b>	EMBRAPA	The Brazilian Agricultural Research Corporation	Licia Maria Lundstedt



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	EPAGRI	Empresa de Pesquisa Agropecuária e Extensão Rural de Santa Catarina	Felipe Suplicy
	Consultant		Felipe Matias
	ASC	Aquaculture Stewardship Council	Laurent Viguie
	AquaGenetics		Gustavo Crosara
	SPI	AANChOR	Caique Neves
	BluEcoNet	JPA Partner	Fabio Pereira
	ASTRAL	Sister Project	Elisa Ravangan
	AquaVitae	Sister Project	Lucas Torati from Embrapa is AV brazilian focal point
	South African Team - via CSIR	South Africa Synergies	Nikke Funke
	AAOYA	All Atlantic Youth Ambassadors Aquaculture Lead	Gary Kett
	EURASTiP Link	H2020 Linked Project	Mieke Eggermont / David Little
	PHARMAQ (Zoetis)		Terje Tingbø
	SAN Vet		Ricardo Hayashi
	Universidade Federal de Santa Catarina		Débora Machado Fracalossi
	Peixe MG		Jorge Vieira Barbosa
	EPAGRI	Empresa de Pesquisa Agropecuária e Extensão Rural de Santa Catarina	Luis Hamilton Pospissil Garbossa
	Aquaeficiencia		Sheyla Vargas
	Grupo Boticario		Denia Zanghelini
	ADM Neovia		Ivan Luiz Gavioli
	Epagri	Empresa de Pesquisa Agropecuária e Extensão Rural de Santa Catarina	Jorge de Matos Casaca
	Embrapa	The Brazilian Agricultural Research Corporation	Eric Arthur Bastos Routledge
<b>Individual Invitations</b>	INSTITUTO INNA IMC DE INOVACAO ISRAELENSE		Moshiko Frenkel
	Trevisan Equipamentos		Eniel





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	FAO	Food & Agriculture Organisation of the UN	Rodrigo Roubach
	Zimmermann Aqua Solutions (Norway)		Sergio Zimmermann
	Somali National University		Hassan Kasim Ali
	AAOYA		Hajar Bouzaidi / Marissa Brinks-Hull
	Federal University of Santa Catarina	Universidade Federal do Espirito Santo – UFES (Campus de Alegre)	Regina R. Rodrigues
	UFES-ALEGRE-ES	Universidade Federal do Espirito Santo – UFES (Campus de Alegre)	Lucas Henrique Cortat
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	Incubator of Technology-Based Companies in Aquaculture and Bioeconomy at UNESP University		Guilherme Wolff Bueno

## South Africa

Sector	Organisation	Full Name	Contact Name
Research Entity	SAIMI	South Africa International Maritime Institute	Odawa Mtati
	SAIAB	South Africa Institute for Aquatic Biodiversity	Angus Patterson
	ARC	Agricultural Research Council	Marco Romito
	ARC	Agricultural Research Council	Mary-Jane Thaela-Chimuka
	CSIR	Council for Scientific and Industrial Research	Nikki Funke
University	University of Cape Town		John Bolton
	University of North West		Mulunda
University	University of Stellenbosch		Khalid Salie
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	University of KwaZulu Natal		Andre Vosloo
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	Rhodes University		Cliff Jones
	Rhodes University		Mafa Hara
	University of Western Cape		Rian Cedars
	University of Limpopo		Raphalo EM
	University of Mpumalanga		Gordon O'brien
	Walter Sisulu University		Grace Okuthe
<b>Industry Sector Representatives</b>	Abalone		Sarah Halse
	Mussels		Pienaar Vos
	Oysters		Kevin Ruck
	Finfish		Andre Bok
	Tilapia		Gillian Taylor
	Catfish		Hanlie Reinecke
	Trout		Henk Stander
	AquaSA		Johan Heckroodt
	Fewcoopsa	Food Energy Water South Africa Tertiary Cooperative Ltd	Mashebane Masechaba
	MARBEC, IRD	MARine Biodiversity Exploitation & Conservation	Maria Darias
<b>Public Agency / Department</b>	TIA	Technology Innovation Agency	Sibusiso Manana
	TIA	Technology Innovation Agency	Wolisa Melamane
	NRF	National Research Foundation	Tracy Klarenbeek
<b>Government</b>	DSI	Department of Science and Innovation	Gilbert Siko
	DSI	Department of Science and Innovation	Thabang Bambo
	DFFE_O&C	Department of Forestry, Fisheries and the Environment	Ashley Johnson
	DFFE_ATS	Department of Forestry, Fisheries and the Environment	Khumo Morake-Makhalemme
<b>Government</b>	DFFE_SAM	Department of Forestry, Fisheries and the Environment	Asanda Njobeni





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	DFFE_CD_AED	Department of Forestry, Fisheries and the Environment	Beleman Semoli
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Andrea Bernatzeder
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Grant Pitcher
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Brett Macey
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Kevin Christison
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Chris Fouché
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Dale Arendse
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Esau Mbokane
<b>Government</b>	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment:	William Selapa





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Creating an Atlantic Ocean Community by Implementing the Galway and Belém Statements



		Aquaculture Research Development	
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Molatelo Madibana
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Mark Goodman
	DFFE_D:ARD	Department of Forestry, Fisheries and the Environment: Aquaculture Research Development	Oyama Guwa
<b>GARIEP Demonstration</b>	DFFE ATS Production Manager	Department of Forestry, Fisheries and the Environment	Craig Clayden
<b>Feed Manufacturer</b>	SAF (Production Manager)		Ryan Weaver
	Nutrition Hub		Laurens De Wet
	Marifeed		Dirk Weich
<b>NGO</b>	WWF	World Wildlife Fund	Crag Smith
<b>BrATiP Link</b>	UFSC	University of Santa Catarina	Feliepe Veira



## II. Facilitation of Brokerage Event in Brazil

### 2.1. Introduction

The Joint Pilot Action AA-ATiP was initially conceived as a pilot action to consider the demand for and viability of a multi stakeholder platform for the Brazilian aquaculture sector, designed to identify and prioritise research and innovation requirements for the sustainable development of aquaculture in Brazil.

This so called BrATiP (Brazilian Aquaculture Technology and Innovation Platform) would be considered with regard to potential application to other Atlantic nations, with a long-term goal being the consideration of an All-Atlantic platform to identify common research and innovation challenges. An in-person stakeholder brokerage event was envisaged to take place in Brazil during the lifetime of the JPA (2021, prior to the development of the Covid-19 pandemic) and with a road map to inform on the steps necessary to put any platform into being. In terms of international collaboration within the AANChOR CSA, stakeholders from the South African aquaculture sector were to be invited to the Brazilian brokerage event to consider application of the European, Brazilian and other (e.g. south Asian) experiences to their own situation.

Re-branded as AA-ATiP at the request of AANChOR project management during the lifetime of the JPA, work continued with a focus on Brazilian and South African stakeholders, but with an open and welcoming approach to include representation from other Atlantic nations. As detailed in the full report below, participation and development of the process remained an organic, bottom up, voluntary exercise, but with engagement encouraged from all participating nations, although with the decision to engage, or not, very much left up to individual stakeholders. National and stakeholder ownership of any platform methodology and process has always been considered as essential to the viability of any multi-stakeholder entity. At no point in the JPA process was the position taken that any platform should be created or forced upon a stakeholder community that did not wish to undertake the development process themselves. Self-determination remains a core value of the JPA philosophy.

### 2.2. Background and Timing of the Brokerage Event

The AA-ATiP brokerage<sup>6</sup> event (Task 2 as identified within the JPA agreement) took place from Wednesday 17<sup>th</sup> to Thursday 18<sup>th</sup> August 2022. A “wash up exercise” – identified as day three of the event – took place on Friday 19<sup>th</sup> August, continuing through the week of 22<sup>nd</sup> to 26<sup>th</sup> August. This took the form of farm visits,

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<sup>6</sup> As the term “brokerage” does not translate easily into Portuguese (with the same meaning with which it is now being used in English) the term workshop will be variously used in this reporting.



physical, online and both one to one and group WhatsApp<sup>7</sup> discussions, to accommodate the availability of the local organising committee.

As noted in the original JPA proposal and contract, it had always been envisaged that the brokerage event should take place in person, online tools being considered insufficient to establish the level of trust required between stakeholders and to achieve and capture the nuance and level of detail of discussions required. To this extent, planned in person events were twice postponed due to Covid-19 travel restrictions, from Q4 2021 to Q1 of 2022 task 2 finally being executed in Q3 of 2022.

Whilst frustrating, these delays ultimately proved to be highly advantageous in the delivery of Task 2 and the impact of the entire JPA. A greater level of stakeholder mapping was undertaken (Task 1) and greater communication and dissemination regarding the event took place amongst sector representatives, allowing for greater trust building and familiarisation with the motivation for the JPA. Finally, these delays have enabled the Task 3 roadmap to accommodate and align with important strategic documents developed by Brazilian stakeholders during 2022 (see below). The two key documents include a national strategic plan for aquaculture developed by the Ministry of Agriculture, Livestock and Food Supply with industry (see Annex 2) and recommendations made in the FNAP Declaration (National Forum for Aquaculture and Fisheries) for any incoming Government<sup>8</sup> (see section 4.1 below) that may now be cross referenced in the Task 3 platform roadmap. Should the event have been held prior to the completion of these documents, much of the task impact and legacy may well have been superseded or appear to have been developed in isolation of other actions taking place within the Brazilian aquaculture sector.

Timing and location of the Task 2 workshop were not specified in the original JPA proposal, with the JPA lead noting any event must be held in accordance with the recommendations of Brazilian stakeholders. The selected venue was in Florianópolis, Santa Catarina State, Brazil. Santa Catarina is one of the key aquaculture production areas of Brazil (shellfish, finfish, shrimp) and has witnessed strong industry, state government, research and academic initiatives for the aquaculture industry in recent years. The Federal University of Santa Catarina (UFSC) acted as host for the event, including offering a technical tour of their marine laboratory facilities and hosting a dinner for delegates, offering local aquaculture products.

The timing of the event also allowed for the writing up of a report and summary findings to be presented 10 days later during the IFC Conference<sup>9</sup> at Foz do Iguaçu, Paraná State, Brazil. One of the largest and most

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<sup>7</sup> For those unfamiliar with common Brazilian social and working practice, WhatsApp is by far the dominant method of business and social communication, including for the exchange of documents and other information.

<sup>8</sup> Presidential elections in Brazil during October in 2022 mean that a new Government programme took effect from January of 2023.

<sup>9</sup> See: <https://ifcbrasil.com.br> for further details



important aquaculture industry events to take place in Brazil, this event provided an opportunity to reconvene many of the key stakeholders from the Task 2 event, to further consult in person with additional industry representatives and both to refine and confirm the decisions made at the brokerage event and during the drafting of the subsequent roadmap. Additional meetings were held in association with the ASTRAL side event and BluEco Net workshop taking place during the conference.

### 2.3. Local Organizing Committee

In addition to EATiP taking the lead for the development of the JPA proposal, a local organising committee was convened to facilitate the brokerage event comprising representatives of:

- AquaBio<sup>10</sup> (BR)
- Embrapa<sup>11</sup> (with crossover link to the AquaVitae project) (BR)
- FURG<sup>12</sup> (with a crossover link to the ASTRAL project) (BR)
- Guabi<sup>13</sup> (BR)
- PeixeBR<sup>14</sup> (BR)
- UFSC<sup>15</sup> (BR)
- UNESP<sup>16</sup> (BR)

At the expressed wish of the individual members of the Committee, invitations to the event were sent by EATiP on behalf of the project (AANCHOR) making reference to UFSC, AquaBio and Peixe BR as welcoming hosts. Whilst host organisations were referenced, individual names were not, again at the request of the local organisers.

A senior consultant at SPI (PT) provided assistance with certain aspects of Task 2, including in the preparation of papers & materials for the Brokerage Event and attending in person. Unfortunately, the consultant was not able to remain for the subsequent outreach and follow up meetings nor the IFC Conference 2022. The consultant was not able to assist with the additional Task 4 in South Africa, but did provide assistance in formatting the Task 3 reporting.

<sup>10</sup> See: <https://www.aquabio.org.br>

<sup>11</sup> See: <https://www.embrapa.br/en/pesca-e-aquicultura>

<sup>12</sup> See: <https://www.furg.br/en/>

<sup>13</sup> See: <https://www.guabi.com.br/en/aqua/>

<sup>14</sup> See: <https://www.peixebr.com.br>

<sup>15</sup> See: <https://ufsc.br>

<sup>16</sup> See: <https://www2.unesp.br>



## 2.4. Methodology

Task 2 took the form of an in-person (primary focus) workshop, ultimately with a hybrid option offered, noting the trend towards offering online options. The hybrid option was offered for those unable to attend due to logistical / financial reasons but more importantly, also facilitated the provision of simultaneous English / Portuguese translation through an online platform for all participants. Stakeholders were advised that the design of the event would be geared toward in person discussions.

Over 120 key stakeholders were identified (as the core representatives of the sector, see Task 1 report for further information) and invited / registered of whom ultimately nearly half participated; this gives an impressive invitation to active participation return of nearly 50%.

Delegates comprised: industry and industry value chain (feed, equipment, pharmaceutical sectors), industry associations, research, academia, Government (Federal and State), other relevant competent authorities – e.g. Embrapa, EPAGRI – and individual experts and consultants across the Brazilian aquaculture sector.

The local organising committee have confirmed they are extremely satisfied that all key stakeholder groups were present and represented at the brokerage event, noting the timing of the event is significant and well placed to lead to future action and implementation if consensus is identified.

In terms of content (see Annex I, event agenda) a morning of presentations allowed for the workshop to be set in context, including presentations on AANChOR and the recently formalised and signed AAORIA statement. General trends in multi stakeholder platform development were considered, including reference to the support of the methodology as expressed by FAO<sup>17</sup> and definitions / frames of reference provided for what constitutes a multi stakeholder platform in the context of AA-ATiP.

Case studies of other international aquaculture multi stakeholder platform development initiatives were addressed through consideration of the EURASTiP<sup>18</sup> project. Aspects of wider international collaboration were introduced through Innovation Norway<sup>19</sup> (NO) & BluEcoNet<sup>20</sup> (DE) all as per the original Seed Funding application / contract. Through Innovation Norway and EATiP, reference and linkage is made to the EATiP Mirror Platform Network<sup>21</sup> through the engagement of the NCE Aquatech Cluster<sup>22</sup> (No). Consideration was

<sup>17</sup> See: <https://www.fao.org/publications/sofia/2022/en/>

<sup>18</sup> See [www.eurastip.eu](http://www.eurastip.eu) for further details

<sup>19</sup> See: <https://www.innovasjon Norge.no/en/start-page/> for further details

<sup>20</sup> See: <https://blueconet.com> for further details

<sup>21</sup> See: <https://eatip.eu/working-groups/mips/> for further details

<sup>22</sup> See: <https://aquatechcluster.no/english/> for further details



given as to how commercial competitiveness drives innovation, and how mutual (and international) cooperation may lead creating an industry / commerce / research bridge. The importance and potential for accessing funding through international collaboration actions and projects was also highlighted.

Brazilian representatives of the ASTRAL<sup>23</sup> and AquaVitae<sup>24</sup> projects participated through the involvement of stakeholders from FURG (Dariano Kruppenauer) and Embrapa (Lucas Simon Torati).

The remainder, and majority, of the workshop focussed on facilitated and guided group work, discussion, and exchange of views. The final day witnessed additional presentations from the Ministry of Agriculture (MAPA, Federal Government of Brazil) of their national aquaculture strategy (PNDA, see Annex II) and Embrapa. Finally, EATiP led with a further presentation on the concept and principles of Strategic Research and Innovation Agenda (SRIA) development – including the EATiP European case study and Aqualnova<sup>25</sup> project.

The development of SRIAs is a core element in the development and operation of multi-stakeholder platforms. Such documents, providing the agreed research and innovation priorities of the platform membership and made subject to wider consultation, detail research and innovation needs across a number of thematic areas, for example: consumer issues, governance, aquatic animal health and welfare, technology and systems, certification and food safety etc. SRIA needs are specific to any particular platform but often demonstrate common areas of interest. Other key aims of multi-stakeholder platforms, such as EATiP and the European Technology Platforms, might include citizen engagement and international collaboration<sup>26</sup>.

As noted above, summary findings were presented during the IFC Conference 2022. Not only did this allow further direct contact with industry representatives participating at the event (c. 3000 registered participants) but allowed for presentation of and cross referencing to the JPA during both the BluEcoNet RAS Workshop (30 August 2022) and at the ASTRAL project side event (31 August 2022). This provided the opportunity for discussion of the agreed summary and roadmap having first allowed a period of two weeks reflection on the part of participants.

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<sup>23</sup> See: <https://www.astral-project.eu> for further details

<sup>24</sup> See: <https://aquavitaeproject.eu> for further details

<sup>25</sup> For reference details see:

<https://www.aquatt.ie/aquatt-7th-framework-programme/142-aquainnova/> / [www.eatip.eu](http://www.eatip.eu)

<sup>26</sup> For an introduction to ETP operating methodology, please see:

[https://www.europarl.europa.eu/RegData/etudes/ATAG/2017/603935/EPRS\\_ATAG%282017%29603935\\_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/ATAG/2017/603935/EPRS_ATAG%282017%29603935_EN.pdf)





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### 2.5. Brokerage Event Agenda

#### ❖ *Wednesday – August 17<sup>th</sup>*

##### 09:00/09:30 - Welcome and Ice Breaker

- Introduction of participants and a short welcome by the organisation committee:
- Professor Ronaldo Cavalli, Aquabio (BR)
- Francisco Medeiros, Executive President, PeixeBR (BR)
- Dr. Felipe Vieira, Federal University of Santa Catarina - UFSC (BR)

##### Theme One: Background and Scene Setting

A series of presentations will be provided explaining to participants:

##### 09:30 - The All-Atlantic Ocean Research Alliance

- Caique Neves, Senior Consultant, Sociedade Portuguesa de Inovação - SPI (PT)
  - Introduction to the AANChOR Project and Brazilian participation.
  - Future plans with AAORIA (All-Atlantic Ocean Research & Innovation Alliance).

##### 09:45 - Multi Stakeholder Platforms – Why?

- David Bassett, Secretary General, European Aquaculture Technology & innovation Platform (BE)
  - Introduction to the Multi Stakeholder Platform Concept – what are they and why have them?
  - Trends in multi stakeholder platform development
  - The development / role of a Strategic Research & Innovation Agenda

##### 10:45 - International experiences of collaborations with Brazilian Aquaculture

- Pilar Santos Neves – Project Manager, South America, Innovation Norway (NO)
- Fabio Pereira, Coordinator, BluEcoNet (BMBF, Alfred Wegener Institute, DE)
  - Innovation Norway - opportunities for collaboration between the South and North Atlantic
  - BluEco Net – Considerations about the Germany-Brazil research network

##### 11:15 - Case Studies

- David Bassett, Secretary General, European Aquaculture Technology & innovation Platform (BE)
- Professor Dave Little, Institute of Aquaculture, University of Stirling (UK)
  - Experiences of international platform development:
  - Europe - EATiP
  - South Asia - EURASTiP





## 13:00/16:00 - Theme Two: Practical Considerations for Platform Development

- *All Participants*

- Building on the case studies and structural issues presented during the morning, delegates will be invited to provide thought and comment on how the following topics ought to be addressed within the context of any Brazilian (or other national) platform for the development of sustainable aquaculture.
- Motivation & key objectives for the national industry / sector
- “Why would we want to do this? What do we hope to achieve?”
- Stakeholder Identification
- Who should be included – what sectors and aspects of the aquaculture value chain?
- Funding Models & Long-term viability
- Who is going to pay for it? How will any platform be sustained? How will it be staffed and resourced?
- Governance
- What formal structure does any national platform need to take? Does there need to be a legal framework? What form of management does there need to be? Who should be included in this?
- Regional or Working Group Representation
- Will one national platform prove sufficiently representative? Ought there to be regional representation? (e.g. by state? by sector? by species?)
- International Collaboration
- What ambitions are there for any national platform to engage in international collaboration, specifically across other Atlantic nations (USA, Canada, Argentina, EU, Morocco, Cape Verde, South Africa and other countries joining AAORIA) or further afield.

## 16:00 - Site Visit to Federal University of Santa Catarina

- *All participants*

- Participants are invited to a tour of the aquaculture research facilities operated by UFSC.

## ❖ *Thursday – August 18<sup>th</sup>*

### 09:00/09:15 - Welcome and summary of day 1.

- *David Bassett, Secretary General, European Aquaculture Technology & innovation Platform (BE)*

## 09:30/12:30 - Theme Three: Practical Application – Table / Group Work



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- *All participants*

- Delegates will be invited to form groups to work through a series of questions building upon the practical considerations developed during Theme 2 of the preceding day.
- Groups with moderators will be asked to report back on the desirability and possible structure of any national platform, considering:
  - Is there a demand for and discernible benefit of national platform development?
  - What model(s) of platform may work?
  - What structuring would support this?
  - What steps require to be undertaken to facilitate this?
  - What membership / funding / governance models are recommended?
  - How will any platform be delivered?

### 13:30/15:30 - Theme Four: Strategic Research & Innovation Agenda Development (SRIA)

- *David Bassett, Secretary General, European Aquaculture Technology & innovation Platform (BE)*

- *All participants*

- As demonstrated on day one and during the case study presentations, multi stakeholder platforms often operate to a strategic research and innovation agenda; promoting the priorities for action for the national (regional, or international) aquaculture sector to develop and grow in a sustainable manner.
- A case study will be presented on the development of the [EATiP SRIA](#). – David Bassett, Secretary General, EATiP
- Delegates will be invited to consider from their national perspective:
  - Thematic Areas for inclusion in any national (regional, or international) SRIA
  - Target Audiences & End Users for a SRIA
  - Ensuring legitimacy and objectivity in the development of a SRIA
  - Future proofing and ensuring long-term viability for a SRIA

### 16:00 - Conclusions, Wrap Up & Final Q&A / Feedback Session.

- *All participants*
- What happens next?
- Reporting and write up of the Workshop and next steps.



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### 2.6. List of participants<sup>27</sup>

Name	Institution
Hajar Bouzaidi	AAOYA
Ricardo Massato Takemoto	ABRAPOA - Associação Brasileira de Patologistas de Organismos Aquáticos e Universidade Estadual de Maringá.
Ivan Luiz Gavioli	ADM – Neovia
Fabio Pereira	Alfred-Wegener Institut
Luiz Marques da Silva Ayroza	APTA Regional/SAA
Sheyla Vargas	Aquaeficiencia
Ofélia Maria Campigotto	Associação Catarinense de Aquicultura - ACAQ
Scheila Anelise Pereira Dutra	Departamento de Aquicultura-CCA/UFSC
David Bassett	EATiP
Bruno Ricardo Scopel	Ecomarine Biotech
Roberto Manolio Valladão Flores	Embrapa
Eric Arthur Bastos Routledge	Embrapa
Lícia Maria Lundstedt	Embrapa Fisheries and Aquaculture
Danielle de Bem Luiz	Embrapa Pesca e Aquicultura
Manoel Xavier Pedroza Filho	Embrapa Pesca e Aquicultura
Lucas Simon Torati	Embrapa Pesca e Aquicultura
Luis Hamilton Pospissil Garbossa	EPAGRI
Felipe Matarazzo Suplicy	Epagri
Jorge de Matos Casaca	Epagri
Murilo Quintiliano	FAI Farms Limited
Rodrigo Roubach	FAO

<sup>27</sup> The list of participants quoted is drawn from those who formally registered for the event, either online or in-person, and were present for all or part of the event. However, a number of additional participants and / or named alternatives, also took part, leaving final engagement levels in excess of the 56 registered. Attempts at encouraging said participants to register retrospectively for record keeping have, sadly, not always proven successful.





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Fabio Faria Brognoli	Federação de Empresas de Aquicultura
Regina R. Rodrigues	Federal University of Santa Catarina
Felipe Matias	FUNCAP
Ronaldo Olivera Cavalli	FURG - Universidade Federal do Rio Grande + AQUABIO - Sociedade Brasileira de Aquicultura e Biologia Aquática
Denia Zanghelini	Grupo Boticario
Guilherme Wolff Bueno	Incubator of Technology-Based Companies in Aquaculture and Bioeconomy at UNESP University
Pilar Neves	Innovation Norway
Moshiko Frenkel	Instituto INNA IMC de Inovação Israelense
Carolina Mendes Costa	Ministério da Agricultura Pecuária e Abastecimento/MAPA - Secretaria de Aquicultura e Pesca/SAP
Maurício Nogueira da Cruz Pessoa	Ministério da Agricultura, Pecuária e Abastecimento
Francisco Medeiros	PEIXE BR
Jorge Vieira Barbosa	Peixe MG
Terje Tingbø	PHARMAQ (Zoetis)
Fernanda Queiróz e Silva	Prefeitura Municipal de Joinville
Ricardo Hayashi	SAN Vet
Marco Aurélio Rotta	SEAPDR
Alan David Claumann	Sebrae
Newman Costa	Sebrae nacional
Sérgio Winckler da Costa	Secretaria de Estado da Agricultura, da Pesca e do Desenvolvimento Rural
Hassan Kasim Ali	Somali National University
Caíque Martinez Neves	SPI - Sociedade Portuguesa de Inovação
Antonia Micaele Pereira Sales	Spring Genetics
Luiz Eduardo Conte	SUIAVES
Eniel	Trevisan equipamentos
Nedy Chiesa	Trevisan Equipamentos Agroindustriais
Lucas Henrique Cortat	UFES-ALEGRE-ES





José Luíz Pedreir Mourinho	UFSC
Walter Quadros Seiffert	Ufsc
Maria Celia Portella	UNESP - Centro de Aquicultura
Gilberto Caetano Manzoni	Universidade do vale do Itajai - Centro Experimental de Maricultura - UNIDADE PENHA

## 2.7. Stakeholder Responses & Feedback

During and following the workshop, stakeholder reactions and responses to the development of a platform remain highly positive, although there are concerns over a number of issues including:

- Long term funding models;
- Duplication of stakeholder networks / stakeholder fatigue;
- Overcoming barriers to genuine collaborative working.

Such concerns are to be expected and indeed continue to cause concern within other platform arenas, including the EU.

A gap analysis of those who stakeholders who did not participate in the event, or who had been overlooked in the original stakeholder mapping, was undertaken and acting on advice of the local organising committee follow up 1:1 meetings / interviews took place to ensure adequate representation during ongoing platform development.

- It is important to emphasise that all stakeholders participating in the Brokerage event expressed their support for establishing a Brazilian multi stakeholder platform. A clear purpose and associated benefits have been identified. A steering group / committee has been formed to drive forward platform development.

It will be pragmatic for any platform development to align with the recently concluded Brazilian PNDA exercise and to accommodate other strategic visions for aquaculture including those of Embrapa, the call to do so being clearly expressed by representatives of these organisations during the workshop.



### III. RoadMap for the development and long-term sustainability of BrATiP

#### 3.1. Purpose and Objectives of any Brazilian Platform

##### 3.1.1 DRIVERS

Key to the function of any platform proving successful and viable in the long-term is the need to identify motivation / drivers for the platform establishment. To this extent, participants agreed that the key purpose and benefit, indeed mandate, of a platform would be:

- *“To serve as an independent, objective, representative body that acts as a custodian of an agreed RTDI strategy and prioritisation exercise, presenting an agreed sectoral strategic research and innovation agenda to Government, agencies, research providers, academia and other national or international aquaculture stakeholders as required.”*

Being industry led and developed in consultation with all stakeholders, this SRIA should remain independent of any vicissitudes caused by changing political or economic circumstances.

Brazilian aquaculture production is growing, as asserted during the workshop at a rate of 5% per annum. However, the potential for growth is much higher. Any platform should look to support and facilitate this.

Consensus objectives for the platform to consider that emerged from the workshop include:

- Supporting the growth and development of the Brazilian aquaculture sector;
- Addressing Food Security through increased aquatic food production, both for domestic consumption and a growing international export market;
- Reacting to rising production costs through (and identifying the need for) increased efficiency and precision farming;
- Using the platform to address the pillar of “sustainability” within Brazilian aquaculture strategies, including implementing methodologies such as life cycle analysis (LCA) and product environment footprint (PEF) in addition to other already identified sustainability indicators – e.g. Work<sup>28</sup> undertaken by UNESP/Caunesp, Embrapa & UFPI;
- Securing a route for RTDI representation for micro, small and medium sized enterprises;
- Securing social science considerations in aquaculture production and research with other issues – e.g. education, knowledge transfer, citizen “aquaculture literacy” and gender equality;

<sup>28</sup> For further details please see <https://www.instagram.com/explore/tags/sustentabilidadenaquicultura/> - Valenti et al (2018)



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- Facilitation of long-term teamwork and collaboration between Brazilian networks beyond existing direct project interactions;
- Developing SRIA and RTDI mapping, avoiding duplication in research and allowing for streamlining of project identification in a likely climate of funding challenges;
- Improving communication and dissemination of existing project results and best practice within the network and to the wider community.

Further comments for platform development were noted by representatives of both State and Federal Government, commenting:

- It is the production sector that needs to lead;
- In order to create effective public policy, policy makers require the effective communication of clearly expressed, consensus needs and requirements;
- Civil society, Universities and the research community will be entering an economic climate and atmosphere where Government financial contributions are at best likely to be challenged and most likely to be put under great pressure / restricted.
- c. 90-95% of small-scale producers are operating without licences or permits.

It is also recognised that any platform may allow for a longer-term way of securing funding for projects, including from international collaborations and new networks.

During the course of the JPA actions, a number of bilateral aquaculture collaborations / programmes and partnerships have been identified. In addition to bilateral work with Innovation Norway and the Norwegian Chamber of Commerce, cited above, other examples highlighted by Fabio Pereira (BluEco Net) during Task 2 include:

- AIF-IRASME-Embrapii<sup>29</sup>
- DAAD-CAPES-PROBAL<sup>30</sup>
- BAYLAT-FAPESP<sup>31</sup>
- DWIH<sup>32</sup>

<sup>29</sup> See: <https://www.ira-sme.net/tag/embrapii/> for further details

<sup>30</sup> See: <https://www.daad.org.br/pt/2022/06/01/lancado-o-edital-probral-de-fomento-a-projetos-de-pesquisa-conjuntos/> for further details

<sup>31</sup> See: <https://www.baylat.org/foerderprogramme/fapespbaylat-ausschreibung.html> for further details

<sup>32</sup> See: <https://www.dwih-saopaulo.org/en/> for further details







Through mapping of further national / regional bilateral agreements with other nation states it is fully possible for any platform to act as a conduit for research and innovation activities, both supporting the aquaculture sector and indeed the emerging platform itself.

Finally, it is agreed that a Platform will lead to increased visibility, particularly with regard to the multi stakeholder relationships and networks that exist, specifically between industry, producers and the wider value chain.

### 3.2. Membership

The likely membership of any platform appears to have significant crossover with existing stakeholder and membership networks, and it will be necessary to avoid duplication of activity and ensure clear demarcation of workstreams. However, this should not prove to be a limiting factor or challenge, providing due consideration is given in the mapping of SRIA development and presentation of the added value of platform activities.

One area requiring further consideration by the steering committee remain Cooperatives. Groups such as COPACOL and CVALE have gained a large stakeholder outreach as they represent a large amount of aquaculture producers and should be included within considerations.

It is most likely that direct membership will include larger industry actors (from across the value chain and including feed and pharmaceutical companies), sector associations, research organisations and academia. This pattern would echo that witnessed in the European experience. Membership categories would therefore follow a pattern of:

- Industry – Companies (Farmers, Producers, Value Chain);
- Industry – Associations (Large producers, Small producers, Regional Producer organisations, Cooperatives, Species specific organisations etc.);
- Research Organisations (Public, Private, Public – Private, Industry);
- Academic Partners (Universities, Societies);
- Consumer, Civil Society and NGO;
- Linked Associations (Feed Manufacturers, SEBRAE, Innovation / Business Support agencies etc.).

For the purposes of transparency, particularly with regard to potential funding sources (see below) it is recommended that Government and agencies do not register as formal members of the platform, but instead act as linked associations, as considered during the stakeholder workshop event.



Diagram for platform membership & interaction:

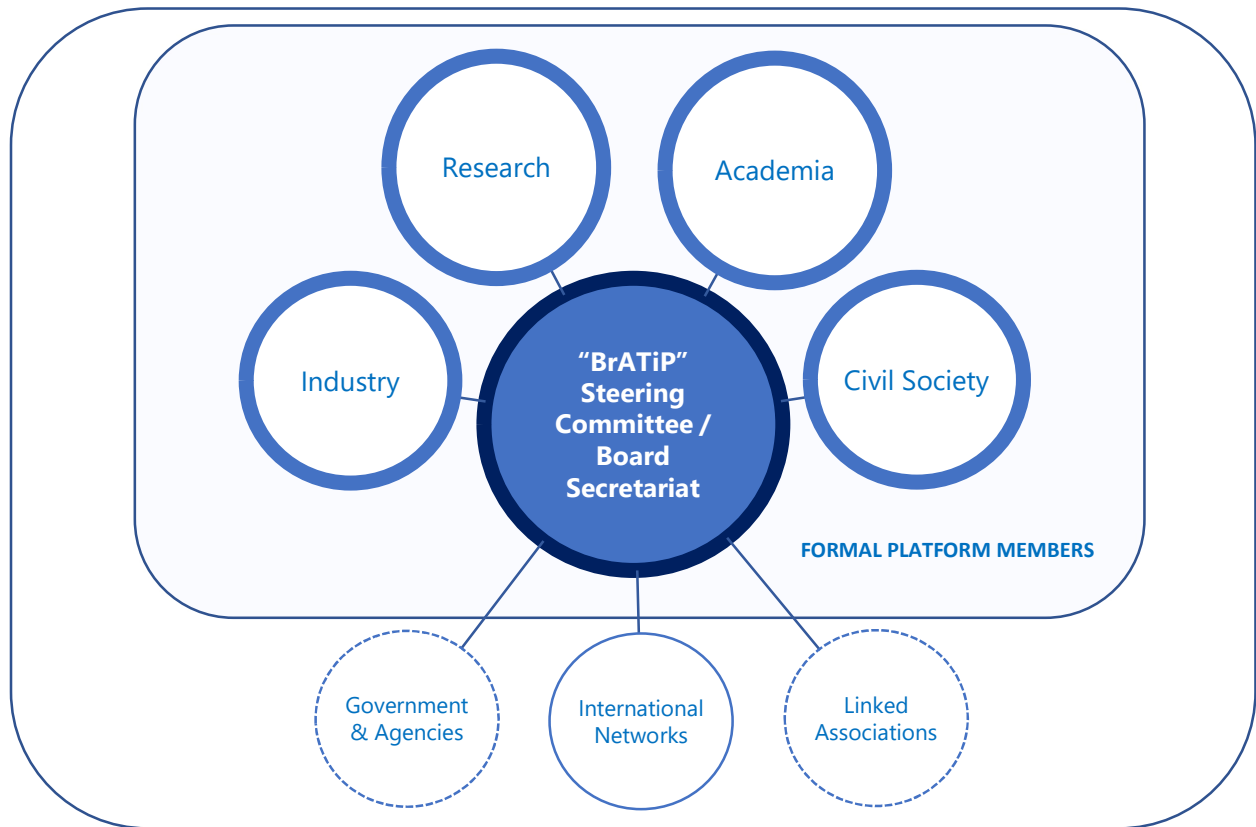


Figure 1 - Diagram for platform membership & interactions

Existing networks, lines of communication and interaction between stakeholders remain unaffected through platform development and should not be considered supplanted by any platform development.

### 3.3. Operating Methodology

During discussions, it emerged that there is a perception at least of Brazil operating in a less formalised, certainly contractual, manner than other national case studies.

However, it is noted that for a platform to function – and certainly to participate in project activity at the international level – the platform will need to be officially constituted / registered and there will need to be a recognised and formalised management structure (accounting, reporting etc.).



Further to consideration of the EURASTiP project experience and deliverables during the workshop, it is concluded that stakeholders felt there would be a natural trend towards the “networked” model<sup>33</sup> given the effective and representative stakeholder networks that already exist and operate in Brazil.

Consideration was given as to who will be able to fulfil the role of “trusted brokers” for the Brazilian aquaculture sector. A founding steering committee to take forward the Platform initiative is proposed including representatives from:

- Peixe BR – Francisco Medeiros – Representing c. 70% of industry production;
- Small Producers – Ofélia Maria Campigotto/ Fernanda Queiróz de Silva;
- ABCC – Brazilian Shrimp Farming Association – Itamar Rocha / Rodrigo Carvalho;
- AquaBio – Ronaldo Cavalli - Representing the Scientific and Academic perspective;
- HIPRA – João Moutinho – large company representative – with particular reference to vaccines and farm health planning;
- GUABI – João Manoel Cordeiro Alves (Who will liaise with the Feed Manufacturers’ Association Sindrirações);
- UFSC – Felipe Vieira;
- FURG – Dariano Krummenauer (in addition with a current link to the ASTRAL project);
- Secretaria de Estado da Agricultura, da Pesca e do Desenvolvimento Rural of Santa Catarina State - Sergio Winckler da Costa;
- BluEco Net – Fabio Pereira (with regard to networks and international collaborations);
- Felipe Matias – Representing Small Producers, FUNCAP (State agency for research for Ceara) Executive Secretary of the RAA & other groups;
- Fernanda Borges - AquaCerti - Sustainability Indicators, Certification, Consumer Perspectives;
- Shellfish – Felipe Suplicy from EPAGRI;
- Ornamentals – Felipe Weber (acting in a consultant capacity);
- Algae<sup>34</sup>;
- Equipment / Engineering – Trevisan.

Regulatory/ Government / Agency Engagement (ex-officio)

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<sup>33</sup> For further details of this work please see: <https://doi.org/10.1016/j.aquaculture.2020.735822> “Implementing aquaculture technology and innovation platforms in Asia” – Science Direct – Bush et al (2021)

<sup>34</sup> No representative of the Algae sector was identified during the Workshop. However, post workshop suggestions include from the academic side, Leila Hayashi (UFSC) and from an industry side, consultants such as Miguel Sepulveda, Rio de Janeiro.



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- Carolina Mendes Costa – MAPA<sup>35</sup> – with additional cross over to the PNDA;
- Juliana Lopes da Silva – MAPA – with specific recourse to environmental and water regulation;
- Taciano Maranhã – Parana State Agency of the Environment;
- Licia Maria Lundstedt / Manoel Xavier Pedroza Filho – Embrapa (with regard to questions on alignment / consideration of theoretical funding via the Embrapa Private Fund);
- Jorge Matos Casaca - Epagri – Small producer liaison, with additional recourse to considering equipment and technical issues.

As the dynamic of the founding committee is clarified, a management committee or Board of Directors may be established / appointed responsible for the operation of the platform. During the workshop it was acknowledged that the Platform should operate on the principles of equality and fair representation across all categories.

It is recognised that despite the enthusiasm of the identified stakeholders to engage with this work, it will most likely be necessary to identify a project officer / coordinator to help drive forward the work, put together documents and drafts, service meetings etc. It is possible that this role could be supported through Peixe BR, although this requires further consideration and agreement.

With regard to stakeholder participation and representation, it is generally believed that adequate stakeholder mapping has been undertaken within the Brazilian sector. However, significant numbers of micro and small producers exist, and in certain states hobby farms / stocked recreational fisheries also constitute aquaculture production businesses. All acknowledge that it is important for micro and SME business interests to be represented. Association networks and co-operatives do operate in this regard, and it should be ensured that representative views are taken into consideration by the platform steering committee.

Importantly, and giving rise to the potential for future synergies with regard to challenging research and innovation barriers, the micro / SME production challenge also remains highly relevant to the European sector, with improving research and innovation transfer to such producers continuing to prove a challenge.

During the IFC Conference, at a side event of small producers there was an agreement made to form a national association of small producers. Representation for this has been included on the Steering Committee proposed above.

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<sup>35</sup> Whilst MAPA is unable to officially endorse and sanction the development of the platform, with the development being industry led, the Ministry remain keen to engage with development and to ensure alignment with the PNDA, in addition to consideration of potential funding vehicles.



### 3.4. Steering Group Priorities for Action

Having noted that the timing of platform is highly opportune, given the impending elections and the launch of key policy initiatives in Brazil at a Federal level, it is agreed that it is important the Steering Committee do not lose impetus during Q4 2022 and Q1 2023.

To this extent a series of focused meetings of the Steering Group should be convened as soon as possible to resolve the following points:

- Appointment of Chair of Steering Group and any supporting Secretariat;
- Immediate consideration of resourcing and funding of said secretariat (if deemed necessary);
- Funding models for the short, mid and long-term including:
  - i) Seed funding, pump prime funding from platform supporters.
  - ii) Membership structure and funding categories (based on membership organisation headcount (or turnover, or other metrics yet to be confirmed). This is likely the only viable long-term main funding model and there is strong support for this to be the principle funding source from within the consortium.
  - iii) Additional/supplementary funding applications to national programmes (MAPA, Embrapa, & others).
  - iv) Additional/supplementary funding applications / sources through international projects (EU, Atlantic, NGO, etc.).
- Development of a SRIA with a Thematic Area sub task prioritisation exercise;
- Consideration of a simple communication / promotion plan of the platform to Brazilian sector stakeholders, including through trade press, associations and at key events;
- Consideration of an appropriate registration / incorporation of the platform. (Not for profit organisation, limited company, association, friendly society etc.);
- Drafting of any such required ToR, Articles etc. (Although not considered in detail during the workshop it is possible to consider ToR and Articles of Association from other platform examples as a template should this prove to be helpful – e.g. EATiP).

*(Note: the final two points above may not be required at the domestic / national level, depending upon what funding options are considered. However, they will be necessary were the platform to engage in (international) project actions).*



### 3.5. Appointment of representatives to focus on SRIA thematic areas

As witnessed during the workshop in Florianopolis, complimentary techniques for identifying industry priorities have been employed in Europe, south Asia and within the Brazilian aquaculture stakeholder community with regard to developing both national strategies and SRIA. It is important that for purposes of inclusivity and objectivity, SRIA thematic areas should be progressed and agreed with balanced representation. To that extent, and developing on views expressed during the workshop, six working groups representing the thematic areas identified (see below Section 4.1) should be established, each chaired by a representative of industry and co-chaired by a complimenting representative from the research, academic, Governmental or value chain sector – as may best be considered appropriate. (e.g. – for illustrative purposes only – Industry with Government for issues relating to licencing, certification for issues relating to consumers, research for issues relating to animal health and welfare etc.) These working groups should progress the delivery of agreed SRIA priorities within any thematic area, using a common reporting methodology to allow for the development of an agreed SRIA / Vision.

### 3.6. Funding

The issue of funding any platform remains a priority to be resolved and formalised by the newly convened Steering Committee. However, several important points were recorded during the workshop discussions:

- In order to maintain independence and integrity, any platform should strive to be financially self-supporting;
- It is recommended a membership fee structure is introduced to cover the core operating costs of any platform (e.g. to cover any secretariat or administrative support) although this is likely to be at a low level and may well be subsidised through support being provided by already established organisations (for example, who are prepared to lend staff on a secondment / part time basis facilitate platform development);
- Any platform would, in the longer term, be able to act as a vehicle to secure project funding (including through future international collaboration actions) which will assist in supporting future operation;
- The question of a research fund has been in discussion between stakeholders, Government and agencies. It is possible, although not guaranteed, that the work of the platform could be supported, particularly with regard to the streamlining and prioritising of any research actions or SRIA development, utilising research funding controlled by Government or agencies. One vehicle may prove to be the MAPA Innovagro Fund and it is recommended that the Steering Committee follow up with an early approach to the appropriate officials – with whom informal discussions were held during the IFC 2022 Conference, to consider how to structure any potential approach;



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- There are further potential synergies through the Embrapa innovation model. Although funding is by no means guaranteed (it depends yearly on government budget), Embrapa is supportive of receiving an approach from industry. Funding is provided on a tiered basis at different levels depending on the type of innovation and nature of the applicant (e.g. Social Innovation, Medium sized company, Large company). A business case for short term financial support would have to be proposed, with matched or a proportion of industry self-funding increasing chances of success;
- Without formally committing to do so, Peixe BR noted it may be in a position to collaborate with other funding sources to provide seed funding / initial capital to support the platform;
- Individual private companies engaged in the workshop and stakeholder mapping process, including from the feed and pharmaceutical sectors, have expressed their willingness to support any nascent platform with funding in the short term.

### 3.7. SRIA Objectives

Prior to stakeholders considering SRIA development, two important factors were considered, the details of which were not fully known to all members of the organising committee and to many of the delegates and stakeholders present. As noted above both the Federal Ministry of Agriculture and Embrapa have been engaged in the production of national aquaculture strategies and identification of research and innovation needs.

As such, time was made within the agenda of the Workshop for presentation of these strategies by officials from the Ministry and Embrapa. Such information could be shared with the JPA and this report has been made available in Annex II of this report.

It is agreed by all that any platform SRIA actions should be developed in consideration of these national strategies, ensuring synergies and avoiding any duplication. However, it is also worth noting that the Ministry has asserted the industry will have to take it upon itself the need to implement and deliver the national strategy objectives. Government cannot affect this alone, and the platform is therefore seen as one way of assisting in this delivery.

For reference, the PNDA references 12 programmes for aquaculture development:

1. Environmental and Land Regularization Programme
2. Generation and Management of Aquaculture Data and Information Programme
3. Brazilian Aquaculture Modernization Programme
4. Development of Ornamental Aquaculture Programme
5. Union Water Aquaculture Planning Programme
6. Support to Research, Technological Innovations and Extension Programme





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7. Aquaculture Health Programme
8. Aquaculture Investor Attraction Programme
9. Marketing and Communication Programme
10. Sustainability, Ecosystem Services and Climate Change Programme
11. Brazilian Aquaculture Products Export Programme
12. Aquaculture Promotion and Insurance Fund Programme

The development of a platform can clearly be identified as falling within Programme 6. However, specific SRIA priorities addressing during the workshop cross reference with a number of individual work programmes, and associated sub goals (see below and Annex II).

### 3.8. “A common approach” – thematic areas for consideration

Ensuring a common approach will be key for the successful development of a SRIA. To this extent, not only ought the national strategies be considered in the finalisation and agreement of any SRIA, but at least in the initial stages of any Platform, given the scale and diversity of the Brazilian industry thematic areas should be considered that are cross cutting across all sectors and species.

It was agreed that identifying common causes will help build a sense of legitimacy and purpose for any platform, alongside developing a sense of the platform’s value, reputation and efficacy. Topics should have relevance and benefit to the finfish, shellfish, mollusc, algae, shrimp, marine and freshwater sectors, including ornamental fish producers and traders. Suggested thematic areas and case studies for prioritisation that emerged during discussions included:





- **Thematic Area 1: Licensing, Planning, Consents and Environmental Permitting<sup>36</sup>**

Aligning with PNDA programmes 1,2,3

- **Thematic Area 2: AMR / Aquatic Animal Health & Welfare Planning**

Aligning with PNDA programmes 6,7

- **Thematic Area 3: Social Licence, Education and Communication<sup>37</sup>**

Aligning with PNDA programmes 8,9,12

There is also a clear steer from the workshop discussions for this thematic area to include such social science issues as Gender Equality and collective representation<sup>38</sup> in relation to Brazilian Aquaculture.

- **Thematic Area 4: Sustainability, Zero Carbon and Climate Smart Farming**

Including the consideration of issues such as LCA / PEF, sustainability indicators, carbon credits, tax incentives, the role of algae and low trophic aquaculture in environmental off setting, ecosystem services, Nature Based Solutions (NBS)

Aligning with PNDA programme 10

- **Thematic Area 5: Industry Prioritisation Working Group / Commercialisation and product development**

Aligning with PNDA programmes 8,9,12

There is also a clear requirement to align with identified industry priorities in this field, including in recognition of work ongoing amongst Peixe BR and others.

- **Thematic Area 6: Project Communication, Dissemination and Knowledge Exchange**

To facilitate increased coordination of research within the sector, build and strengthen existing networks, disseminate project outputs and key findings / innovations, ensuring impact and application of aquaculture

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<sup>36</sup> Environmental permitting, licenses and the absence thereof, remains a key issue in Brazilian aquaculture. During the gap analysis of stakeholders, it was recognised that representatives of environmental regulators were absent. This has been addressed in the identification of founding steering committee members above.

<sup>37</sup> During the workshop there was specific enthusiasm for youth outreach involving comic book development through Mauricio de Sousa, with whom links are already established.

<sup>38</sup> This should be delivered through capitalising on other, existing, networked activities relating to gender equality and collective representation in Brazil.



research and best practices. Specifically, to align current and planned research activities with the Brazilian platform and constituent stakeholders.

#### **FÓRUM NACIONAL AQUICULTURA E PESCA:**

These Thematic Areas additionally cross reference to the first five points called for under the *“FNAP: NATIONAL AQUACULTURE AND FISHERIES FORUM: COMMITMENTS FOR COMPETITIVE AQUACULTURE AND FISHING”* (see Annex 2)

### **3.9. SWOT Considerations**

Although not a formal exercise undertaken during the workshop, a post meeting SWOT analysis is used to summarise some key considerations:

#### **Strengths:**

- i. A clear desire on the part of workshop stakeholders to see a platform established;
- ii. Clear identification of benefits to a platform being established;
- iii. A strong, independent, credible and respected network of existing stakeholder organisations and representatives willing to engage in the work. Stakeholders have agreed to form a steering group to continue platform initiation;
- iv. A clear motivation for the Platform to be established, with regard to acting as custodian to an independent and cross-sector agreed RTDI strategy.

#### **Opportunities:**

Specific favourable factors were identified in terms of Platform Development:

- i. Ability to foster platform development and growth through existing membership networks and associations;
- ii. Timing, with regard to steps being in place during Q4 2022 to safeguard platform development and priorities prior to any new Government in Brazil taking office in January 2023;
- iii. Alignment of any Platform with existing national strategies and strategic objectives - including any suggested research fund – and the development of a body to contribute to the implementation of national strategies;
- iv. The potential for future support to national platforms being granted as part of future AAORIA activities.

It would be naïve to suggest barriers to development do not exist, primarily:



### Weaknesses:

- i. Resourcing – time commitment / availability;
- ii. Funding – long-term viability of the platform will remain linked to independent funding beyond the contribution of sponsoring / supporting organisations;
- iii. Scale – the aquaculture sector in Brazil is large, diverse and with many priorities for action, not all of which align. Development will require to be carefully structured and follow a methodological approach;
- iv. Loss of autonomy / conflict of interest – it is feasible that barriers to development could be linked to existing organisational strategies, competing interests and perceived duplication / loss of focus of added value (leadership of the platform should remain linked to industry / platform stakeholders and remain independent of Government and / or agencies).

### Threats:

External factors, including:

- i. Economics, cost of living and price rises;
- ii. Market drivers and production issues (imports, disease etc.);
- iii. Political volition and buy in, reprioritisation, funding re-allocations / reprioritisation;
- iv. Political instability and uncertainty.

### 3.10. Communication and Dissemination

Outputs of the event were communicated through the AANChOR and EATiP networks, both in terms of social media posts (Twitter) and online news articles.

Online articles translated into Portuguese have been made available to the Brazilian stakeholders.

The EATiP General Secretary participated in an interview for VaiAqua, a Brazilian aquaculture community Youtube<sup>39</sup> channel (19,000 subscribers) to assist in the promotion of the event and invite further follow up, comments and engagement. The interview was undertaken by Fernanda Queiróz de Silva (Prefeitura Municipal de Joinville) with translation of questions facilitated by Felipe Vieira, UFSC.

Individual stakeholders have promoted events and activities through Instagram, the more popular social media platform in Brazil but not used by AANChOR or widely in European research circles.

<sup>39</sup> Please see: <https://m.youtube.com/watch?v=apn-vB15F78&feature=youtu.be>



Post event articles are planned (English / Portuguese) for publication in the four main Brazilian trade press publications: Aquaculture Brazil, Panorama da Aquicultura, Aquaculture Magazine and Revista Seafood. Articles are already in development through EATiP and SPI. Articles will aim to raise the profile of the event and provide information on how to participate and engage in the platform.

Articles are also proposed for academic press, although not formal journal articles / publications but rather in order to boost the profile of the platform and again to encourage participation from research and academic stakeholders.

The AA-ATiP JPA has been referenced and promoted at a number of events, both in person and online and including:

- All Atlantic Forum 2021 (Virtual)
- All Atlantic Forum 2022 (Scientific Event) (Virtual)
- All Atlantic Forum 2022 (High Level Ministerial Event – Side event) (US)
- IFC Conference and Fish Expo 2021 (BR)
- Aquaciencia 2021 (BR)
- Aquaciencia 2022 (BR)
- Aquaculture Europe 2021 (PT)
- Aquaculture Europe 2022 (IT)
- AquaFuture Spain 2022 (ES)
- AquaFarm 2022 (IT)
- EATiP events – including Mirror Platform meetings and promotion of international collaboration activities.
- EU DG MARE & EU DG RTD presentations relating to international collaboration in aquaculture and Atlantic research actions.
- AA-BioTecmar Online Forum (Misc)
- ASTRAL and AQUAVITAE project events. (Misc)

Having now completed tasks 1, 2 & 3, further promotion / consideration can be made within the framework of the AANChOR communication channels, including Atlantic podcast series and other events.

Collaboration with current sister projects etc. will continue until project conclusion.



### 3.11. Additional networks addressing International Collaboration

An important observation noted during discussions with stakeholders in Brazil and highlighted during the Workshop event is that of other activities being undertaken with regard to international collaboration – i.e. in addition to any All Atlantic collaborations. The Red de Acuicultura de las Americas (Americas Aquaculture Network) has been established, primarily as an inter-governmental network and supported by the FAO.

Although an Executive Secretary, Felipe Matias, is still in position, the profile and function of the network is currently reduced due to funding cuts and a lack of high-level political support for complex international collaboration actions.

The network comprises: Brazil, Argentina, Uruguay, Paraguay, Peru, Bolivia, Chile, Columbia, Panama, Costa Rica, Nicaragua, Belize, Honduras, Cuba, and the Dominican Republic.

Inspiration for the network came from NACA, although funding and resources are not in any way comparable. However, FAO remains committed to the RAA vision, although believing it needs to be provided with additional financial support / resources. It would be advantageous for any platform to maintain connections with this (dormant) network, and the composition of the steering committee reflects this.

### 3.12. Future All Atlantic Platform Collaboration

There is consensus from stakeholders that Platform priorities remain very strongly fixed to the national level. Multi-stakeholder collaboration needs to be established at national level before international cooperation can be achieved.

The circumstances between, and within, Atlantic partners vary enormously (Governance, economics, political systems, species, production systems, climate, RTDI prioritisation needs...) and the primary focus for all Platforms is perceived as the promotion and support of sustainable sector development at the National level. There is clear agreement on the first priority for action being to address the specificities within the national context of differing Atlantic nations. This point of view is most strongly registered from industry and industry associations.

There is little strong desire to see the development of an overarching All Atlantic Platform, certainly not beyond the level of an informal, potentially online, discussion forum where national representatives might discuss and exchange ideas. The benefit for this is seen as one of information exchange. One operating model for this could be identified from the EATiP Mirror Platform network, currently operating as an online membership forum within the wider EATiP platform membership. This operates with minimal secretariat assistance and cost, beyond meeting administration (preparation of agenda, minutes etc).



However, two clear areas for international collaboration can be identified and may be progressed through such an informal national platform collaboration network:

**i. Recommended Mobility Programme ensuring impact and increased Platform value**

All stakeholders are in agreement that it is important for platforms to be seen as effective agents of change, offering concrete opportunities and benefits to membership, thereby ensuring impact.

To this extent, in addition to being platforms to facilitate internal communication and dissemination between membership, and to facilitate RTDI prioritisation and promotion it is recommended that Platforms engage in the support and promotion of mobility & exchange programmes. (e.g. as demonstrated through the highly successful EURASTiP programme which facilitated, through fixed rate bursary support, inter and intra-regional exchange programmes for industry, research and education candidates, in addition to organising and hosting brokerage/trade missions between the EU and respective south Asian nations.)

This idea received strong support from Innovation Norway and BluEco Net, noting the impact, real and tangible benefits of trade and industry focussed visits and exchanges. Support for developing this initiative is guaranteed from both organisations.

**ii. Future Platform engagement at All Atlantic annual / high level events.**

It is recognised that as part of ongoing All Atlantic Ocean science diplomacy, the Platform would provide an appropriate vehicle for engagement with high level annual events. This could extend to a network of Atlantic aquaculture mirror platforms.

**3.13. AA-ATiP Legacy and crossover to AAORIA**

Should in the support and implementation of the AAORIA declaration future support of aquaculture be identified as an action area, two clear needs may be identified:

- i) Support for further National Platform and RTDI/SRIA prioritisation exercises;
- ii) Funding for both international mobility actions and the facilitation of annual meetings between national aquaculture platform representatives.

Point ii) might usefully be held in association with, or as side event to, any annual AAORIA events.



### 3.14. AANChOR Synergies

Within the original JPA contract a commitment was given to ensure synergies where possible with other all Atlantic actors. During the lifetime of the JPA / AANChOR project, a number of additional demands have been dictated to the JPAs. These additional demands varied in appropriateness and relevance. No additional resources have been offered to support these additional demands. Where possible, practical and credible to do so, without detriment to the original intent and impact of the JPA all effort has been made to facilitate these requests.

As noted above and as per the original contract, AA-ATiP has worked effectively with the ASTRAL and AquaVitae project – through regular informal contact with consortium members and formal joint participation at events. Both ASTRAL and AquaVitae projects were represented at the Task 2 workshop, the IFC Conference, and will continue joint working through collaboration with EATiP at events such as Aquaculture Europe 2022 (and beyond).

Furthermore, as noted above, AA-ATiP has enjoyed a productive working relationship with Innovation Norway and BluEco Net; both of whom are very keen to maintain engagement with and support of any nascent Brazilian platform.

The relevant All-Atlantic Ocean Youth Ambassadors (AAOYA) were invited to participate, in person, in the Task 2 workshop. However, unfortunately, the invitation was declined due to other commitments. It is hoped that synergies with the AAOYA will now be addressed through online tools (podcast etc.).

Throughout the lifetime of the JPA, all attempts have been made to maintain close contact with AA-BIOTECMAR, either directly with the JPA leader or through requested the intervention and assistance of SPI and FCT. The JPA leader was invited to participate in the Task 2 brokerage event in addition to which the names of certain contacts / stakeholders were provided by AA-BIOTECMAR, who were also invited to participate. Early signs suggest that the future working relationship, mutual support and collaboration between aquaculture, marine microbiome and blue biotechnology is something that will be considered further to the AAORIA declaration, and discussions are already underway between interested parties in both north and south Atlantic nations. All parties await confirmation and clarification of future developments, scope and roles.

Although not directly relevant to the JPA agreement, AA-ATiP has maintained contact with AA-BSN and has offered support with regards to publication of articles relating to food security. With social licence, knowledge and education being a key thematic area for aquaculture, it is to be hoped that in the ongoing work of AAORIA and Atlantic Collaboration, any Brazilian platform may be able to exploit future links with any emerging network with regard to schools / educational liaison tools.



With regard to the sharing of data on an All-Atlantic basis, work remains to be done with regard to assessing the marine aquaculture sector in Brazil. Systems and data technologies are neither in place nor utilised in the same regard as they are elsewhere within global aquaculture production. However, with the requirement for the development of precision farming tools and techniques identified and prioritised with Brazil, this will prove to be an important avenue for future joint collaboration.

### 3.15. Summary of Conclusions and Findings

It is clear that Brazilian stakeholders and participants in AA-ATiP believe and agree the establishment of a Brazilian multi stakeholder platform focussing on research and innovation needs is:

- Wanted;
- Beneficial;
- Relevant; and
- Timely.

Furthermore:

- Thematic areas for prioritisation have been identified, at least in the first instance;
- Representative, trusted founder stakeholder members to drive the platform forward have been identified;
- Issues to resolve and to consider further in order for progress to be made have been listed. Necessary partners / collaborators / other stakeholder have been identified, specifically with regard to other national plans and strategies;
- Challenges, specifically with regard to funding and governance have been acknowledged.





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## 3.16. Identification of Roadmap Tasks

In terms of specific tasks to be completed within any roadmap, in order to deliver of a platform in Q1 - Q2 2023 (i.e. to be executed during Q4 2022 – Q1 2023) it is agreed that the following tasks be completed:

### Task 4 - SRIA Development

Steering Committee and Secretariat to ensure:

- Priority thematic areas are presented to membership;
- Thematic working groups are established, including identification of co-chairs;
- Timetable and methodology to consider thematic area priorities agreed;
- Reporting;
- Draft development of SRIA needs with appropriate consultation;

Formal adoption of SRIA by platform membership.

### Task 5 - Policy Alignment

Steering Committee, Secretariat and Membership:

- Consult with (new) Government representatives as to routes for alignment with PNDA and other national funding / research strategies;
- Ongoing promotion of the platform and platform aims and objectives with stakeholders.

### Task 3 - Membership

Steering Committee and Secretariat to ensure:

- Platform promotion;
- Membership Structure finalised;
- Invitations to join the Platform extended.

01

### Task 1 - Meeting of the Founding Steering Group

To consider:

- Platform Scope, Terms of Reference;
- Appointment of Steering Committee / Management Board / Board of Directors.

03

02

### Task 2 - Steering Committee Meeting to address Governance and Finance

Steering Committee to agree:

- Funding vehicles (short, medium, long term);
- Adoption of Articles of Association / Terms of Reference;
- Registration / Incorporation of any Platform.

04

05





## IV. Facilitation of Brokerage Event in South Africa

### 4.1. Additional Task 4 – Brokerage Event, South Africa

As referenced in the introduction to this report, due to the project extension granted to the AANChOR CSA allowing for additional expenditure to be eligible until January 2023, and capitalising on savings made during the Brazilian brokerage event, the JPA lead applied for and was granted permission to run an additional task. Task 4 took the form of an in-person brokerage event, held in Cape Town, South Africa in November 2022.

Again, a local steering committee was organised, comprising representatives of EATiP, DFFE and CSIR.

Financial support was provided by the JPA seed funding (meeting costs, catering, JPA costs), DFFE (travel and subsistence), CSIR (travel and subsistence) and DSI (travel and subsistence).

The event was timed to take part alongside an ASTRAL / AquaVitae project technical tour and project actions in South Africa (Hermanus), thereby ensuring a strong cross representation from European and other Atlantic nation representatives.

The Brokerage event took the form of a two-day event (see 4.2 – Agenda, below) held under the auspices of the South African National Aquaculture Research Forum (NAQUARF). As such, it must be emphasised that this Brokerage event cannot be considered an entirely AA-ATiP / AANChOR supported activity. Whilst it would be fair to comment that the JPA proved to be the catalyst for the event to take place, the organisation of and funding for the event by DFFE, DSI and CSIR was distinct from JPA seed funding.

A full report of the event is in development. However, at the time of this report being submitted, the report has not yet received sign off from South African authorities and cannot therefore be reproduced in any substance in this document. The information will be made available to AANChOR project management, potentially as an addendum to this report, as soon as is possible<sup>40</sup>.

The Brokerage event built upon previous work undertaken by the South African authorities in relation to coordinating classification and prioritisation of sector research and innovation requirements, but which had stalled in the face of other priorities and limited time and resources. As such, it should be noted that this JPA was instrumental in bringing a fresh start and focus to SRIA development in South African and the formation of a multi-stakeholder platform as a vehicle to assist in the delivery of the NAQUARF SRIA and outputs, further supporting industry ambitions and supporting Government policy objectives.

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<sup>40</sup> This is last updated as of March 2023



# ALL-ATLANTIC OCEAN RESEARCH ALLIANCE

Creating an Atlantic Ocean Community by Implementing the Galway and Belém Statements



## 4.2. Brokerage Event Agenda

Partners and co-funders of the workshop.



forestry, fisheries & the environment  
Department: Forestry, Fisheries and the Environment  
REPUBLIC OF SOUTH AFRICA



CSIR  
Teaching lives through innovation



science & innovation  
Department: Science and Innovation  
REPUBLIC OF SOUTH AFRICA



BUILDING AN ALL ATLANTIC OCEAN COMMUNITY  
Implementing the Belém Statement



AANChOR is a Coordination & Support Action project aimed to support the implementation of the Belém Statement. It has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 818395.

## NATIONAL AQUACULTURE RESEARCH FORUM WORKSHOP

**Venue: Protea Hotel, Marriot, Sea Point**

<https://goo.gl/maps/ZaTmJGSRSpWvEver7>

**Time: 9h30 to start at 10am**

### AGENDA

*Tuesday – November 22<sup>nd</sup>*

Welcome and Introductions (Chair: Ms Khumo Morake-Makhalemele)

10:00 – 10:15

- Opening and Welcome (Ms Andrea Bernatzeder)
- Introductions (All)
- Purpose of the workshop (Ms Andrea Bernatzeder)

Theme One: National Strategies and Industry research priorities (Chair: Ms Khumo Morake-Makhalemele)

10:20 National Aquaculture Research Forum (objectives, purpose, composition, Draft ToR's) – Ms Andrea Bernatzeder

10:40 - DSI Research Support Programmes (ABIPP, etc.) – Dr Thabang Bambo

11:00 – Industry sub-sector presentations on research priorities/needs and support required

Each industry association to present a brief overview (ca. 5min) of research priorities/needs and support required.

*Discussion – Tea break (12:00 – 12:15)*



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## Theme Two: Lessons learnt from other Multi Stakeholder Research Platforms (Chair: Ms Andrea Bernatzeder)

### 12:15 - Multi Stakeholder Platforms –

#### David Basset, Secretary General, European Aquaculture Technology, and Innovation Platform (BE)

- Introduction to the AANChOR (All-Atlantic Ocean Research Alliance) Project and South African participation.
- Future plans with AAORIA (All-Atlantic Ocean Research & Innovation Alliance).
- Introduction to the Multi Stakeholder Platform Concept – what are they and why have them?
- Trends in multi stakeholder platform development.
- The development / role of a Strategic Research & Innovation Agenda.
- Experience of international platform development:
  - Europe - EATiP
  - South Asia – EURASTiP
  - Brazil – AANChOR / AA-ATiP JPA

*- Lunch – (13:00 – 14:00)*

*A complimentary buffet lunch will be offered to all delegates.*

## Theme Three: Establishment of a platform and alignment with NAQUARF? (Chair/Facilitator: David Basset)

### 14h00 – 14:30 – Presentation on the NAQUARF Draft TOR and Discussion – A Bernatzeder

### 14:30 - 17:00 – Practical Considerations and Application for Platform Development – *Group Work*

#### *All Participants*

Building on the case studies, national strategies and research support presented during the morning, delegates will be invited to provide thought and comment on how the following topics ought to be addressed within the context of a South Africa platform for the development of sustainable aquaculture. Delegates will be invited to form groups to work through a series of questions, building upon the practical considerations developed during the morning session. Groups with moderators will be asked to report back on the format and structure of a national platform, considering:

- Is there a need for and discernible benefits for national platform and how would this interact and align with NAQUARF?
- What model(s) of platform may work - Who is going to pay for it? How will any platform be sustained? What structuring would support this? Does current structure require amendment?
- How frequent does it meet, in what format and including how many members? Are we missing members?
- What steps require to be undertaken to facilitate this?



- What membership / funding / governance models are recommended?

- Dinner -

*Wednesday – November 23<sup>rd</sup>*

**09:00 - 09:15 - Welcome and summary of day 1**

Facilitators: *Andrea Bernatzeder and David Bassett*

**09:15 - 10:15 – Report Back on Theme Three Discussions**

Groups from day 1 will report back on the format and model of the national platform.

*Tea Break – (10:15 – 10:30)*

**Theme Four: Strategic Research & Innovation Agenda Development (SRIA) (Facilitators: Mr David Basset and Ms Andrea Bernatzeder)**

As demonstrated on day one and during the case study presentations, multi stakeholder platforms often operate to a strategic research and innovation agenda (SRIA); promoting the priorities for action for the national (regional, or international) aquaculture sector to develop and grow in a sustainable manner.

**10:30 - 10:45 – Presentation on Research Focus Areas of the Aquaculture Research and Technology Development Programme (ARTDP) – Andrea Bernatzeder**

**10:45 - 12:30 – Feedback from Academic and Research Institutions on Current Research Focus Areas in workshop format.**

Representatives from academic and research institutions (DFFE, RU, SU, SAIMI, ARC, UCT, NWU, UKZN, CPUT, UWC, PLAAS, UMP, UL) to provide list of key areas of research focus areas (not project level) to identify current research being undertaken within existing key research focus areas.

*- Lunch – (12:30 – 14:00)*

*A complimentary buffet lunch will be offered to all delegates.*



**Theme Five: Identification of research gaps, priorities and collaborations (Facilitators: Ms Andrea Bernatzeder and Mr David Basset)**

**14:00 – 16:00** *All participants*

**16:00 - Wrap up and way forward**

*All participants*

What happens next?

- Reporting and write up of the Workshop and next steps.



## V. Appendices

### 5.1. Annex: Linked National / State Documents

1. Federal Ministry of Agriculture Aquaculture Plan (PNDA)

<https://www.gov.br/agricultura/pt-br/assuntos/aquicultura-e-pesca/aquicultura-1/plano-nacional-de-desenvolvimento-da-aquicultura-pnda-2022-2032/>

2. EPAGRI

[https://docweb.epagri.sc.gov.br/website\\_epagri/Cedap/Publicacao-Seriada/15-Publicacao-seriada-maricultura-gestao.pdf](https://docweb.epagri.sc.gov.br/website_epagri/Cedap/Publicacao-Seriada/15-Publicacao-seriada-maricultura-gestao.pdf)

[http://docweb.epagri.sc.gov.br/website\\_epagri/Cedap/Doc/Planejamento-estrategico-Epagri.pdf](http://docweb.epagri.sc.gov.br/website_epagri/Cedap/Doc/Planejamento-estrategico-Epagri.pdf)

3. PNDA Presentation (EN)

(Adjoined in PDF at the end)

4. Embrapa Information

<https://www.embrapa.br/en/international>

(Plus adjoined PDF at the end)

5. FNAP – Recommendations

(Adjoined PDF at the end)



## 5.2. Annex 3: Photographs

A selection of photographs linked to Task 2 (and follow up to the event) and additional Task 4.



Follow up work to the Brokerage Event (Task 2) at the IFC Conference 2022, including from top left: Consideration of Gender Balance and equality in aquaculture, meeting participants at the trade show and recruitment to the Platform steering group, engaging with the BluEcoNet RAS workshop held alongside IFC, the outside of the event hall – the largest aquaculture conference to be held in Brazil in 2022 – and meeting with representatives of the newly established co-operative for micro and small aquaculture producers in Brazil .





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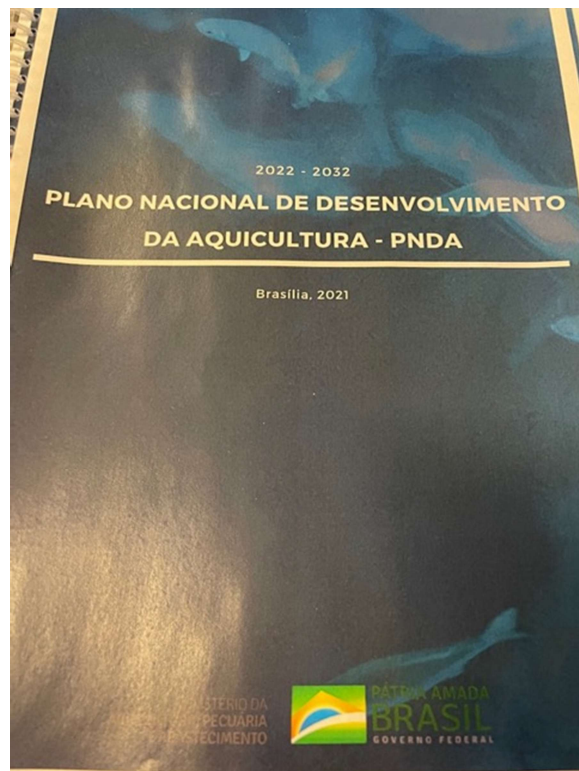


Events associated with the Brokerage event held in Brazil included (from top left) site visits to producers, here is Santa Catarina state, including to the Epagri Lab (TR) and the facilities at UFSC (BR), where delegates considered research work being undertaken (MAPA and Peixe BR in centre picture). A selection of local aquaculture products was served to delegated (BL) during an informal networking dinner as part of the event.



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During the brokerage event (from top left) simultaneous translation was offered to all delegates. Representatives of MAPA were able to present the Brazilian Government PNDA to delegates, to consider alignment between any Platform that is established and actions undertaken at the Government level to support and promote the sector.





# ALL-ATLANTIC OCEAN RESEARCH ALLIANCE

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Clockwise from top left: Communication and dissemination were key parts of the JPA, including filming for the VaiAqua YouTube channel to promote the Brokerage outputs. During the Brokerage event experiences of international collaboration in other regions were considered, including in South Asia through the EURASTiP Horizon 2020 project. Delegates, attending the event (BR) listened to other presentations on international engagement with Brazilian aquaculture including from Innovation Norway (BL) and BluEcoNet – a German/Brazilian research network.



# ALL-ATLANTIC OCEAN RESEARCH ALLIANCE

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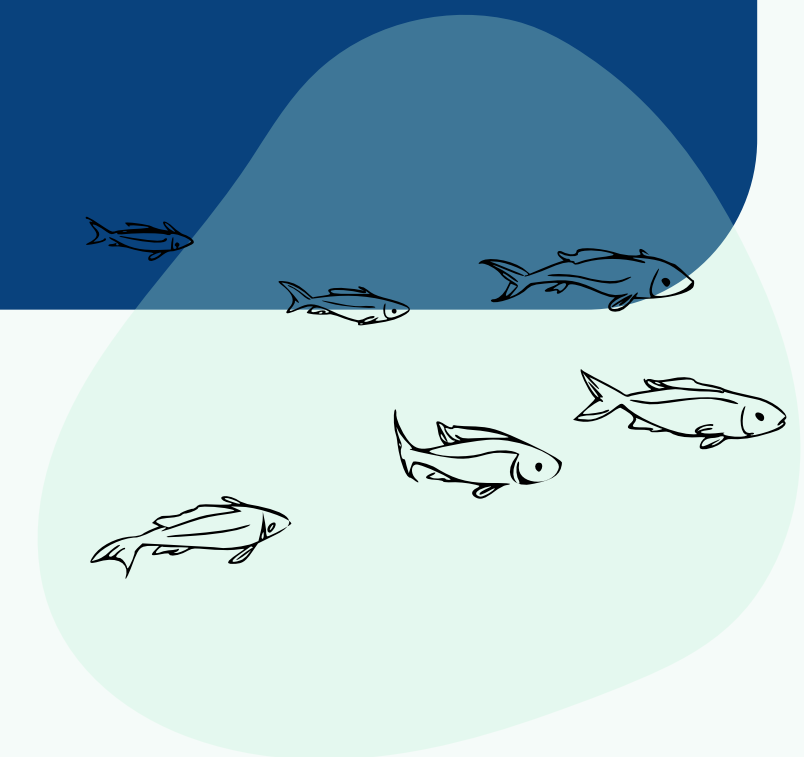


Clockwise from Top Left: JPA AA-ATiP lead EATiP presenting the AANChOR CSA during the brokerage event in Cape Town, DFFE Head of Aquaculture Research Unit Andrea Bernatzeder, Brett Macey (DFFE) with members of the ASTRAL and AquaVitae projects on site visits around Hermanus, AAOYA Marissa Brinks-Hull explaining sea urchin production, abalone farming in South Africa, representatives of DFFE and DSI take stock during the Workshop and Brokerage event.



# “National Aquaculture Development Plan - PNDA 2022-2032”

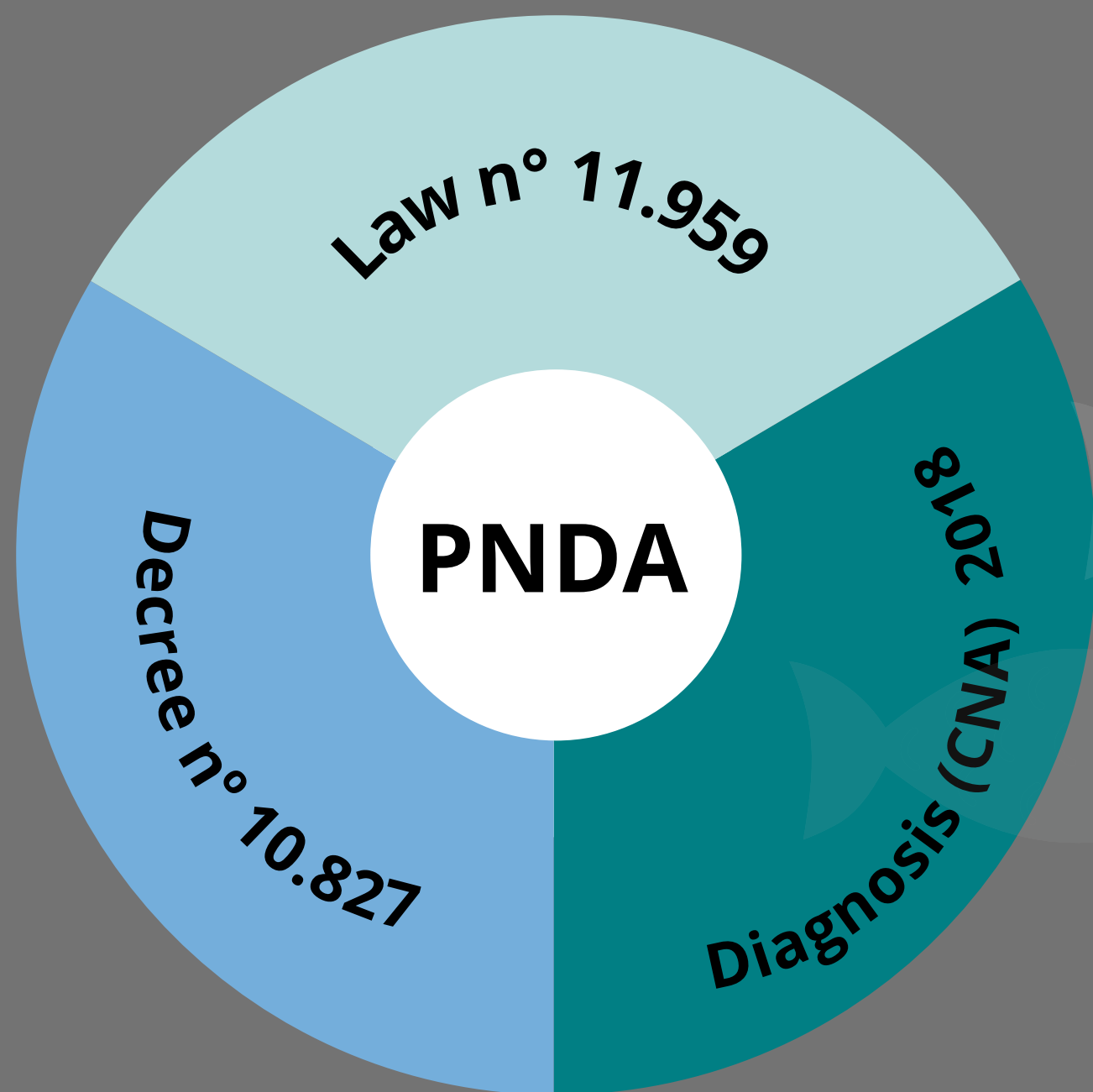
Maurício Nogueira da Cruz Pessoa  
Diretor de Aquicultura  
DPOA/SAP/MAPA - Brasil



# WHAT IS PNDA?

The National Aquaculture Development Plan - PNDA (2022-2032) consists of formulating a governance policy and implementing a plan to stimulate and guide the evolution of the Brazilian aquaculture sector, attracting investments and encouraging the development of the activity in the country, for the next 10 years.





## ORIGIN

The PNDA was based on Law No. 11,959, of June 29, 2009, which institutes the National Policy for the Sustainable Development of Aquaculture and Fisheries, on Decree No. 10,827, of September 30, 2021, and on the Report containing the Diagnosis presented by the Confederation of Agriculture and Livestock of Brazil (CNA) 2018.

## PROGRAMS PRE-STRUCTURING

The Programs were previously structured and presented in plenary sessions for the entities. The selection, inclusion and definition of the Programs was carried out through a participatory process and online voting in plenary via webinar conducted by the Department of Order and Development of Aquaculture/Secretary of Aquaculture and Fisheries- SAP. During the plenary sessions, discussions were largely motivated to generate active and constructive participation on the part of stakeholders.



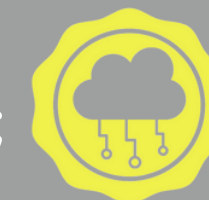


# PNDA PROGRAMS

1-Environmental and Land Regularization Program;



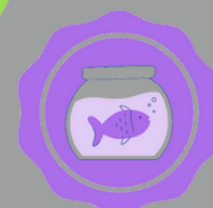
2-Generation and Management of Aquaculture Data and Information Program;



3-Brazilian Aquaculture Modernization Program;



4-Development of Ornamental Aquaculture Program;



5-Union Water Aquaculture Planning Program;



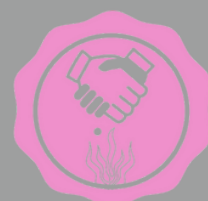
6-Support to Research, Technological Innovations and Extension Program;



7- Aquaculture Health Program;



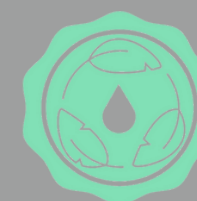
8-Aquaculture Investor Attraction Program;



9-Marketing and Communication Program;



10-Sustainability, Ecosystem Services and Climate Change Program;



11-Brazilian Aquaculture Products Export Program;



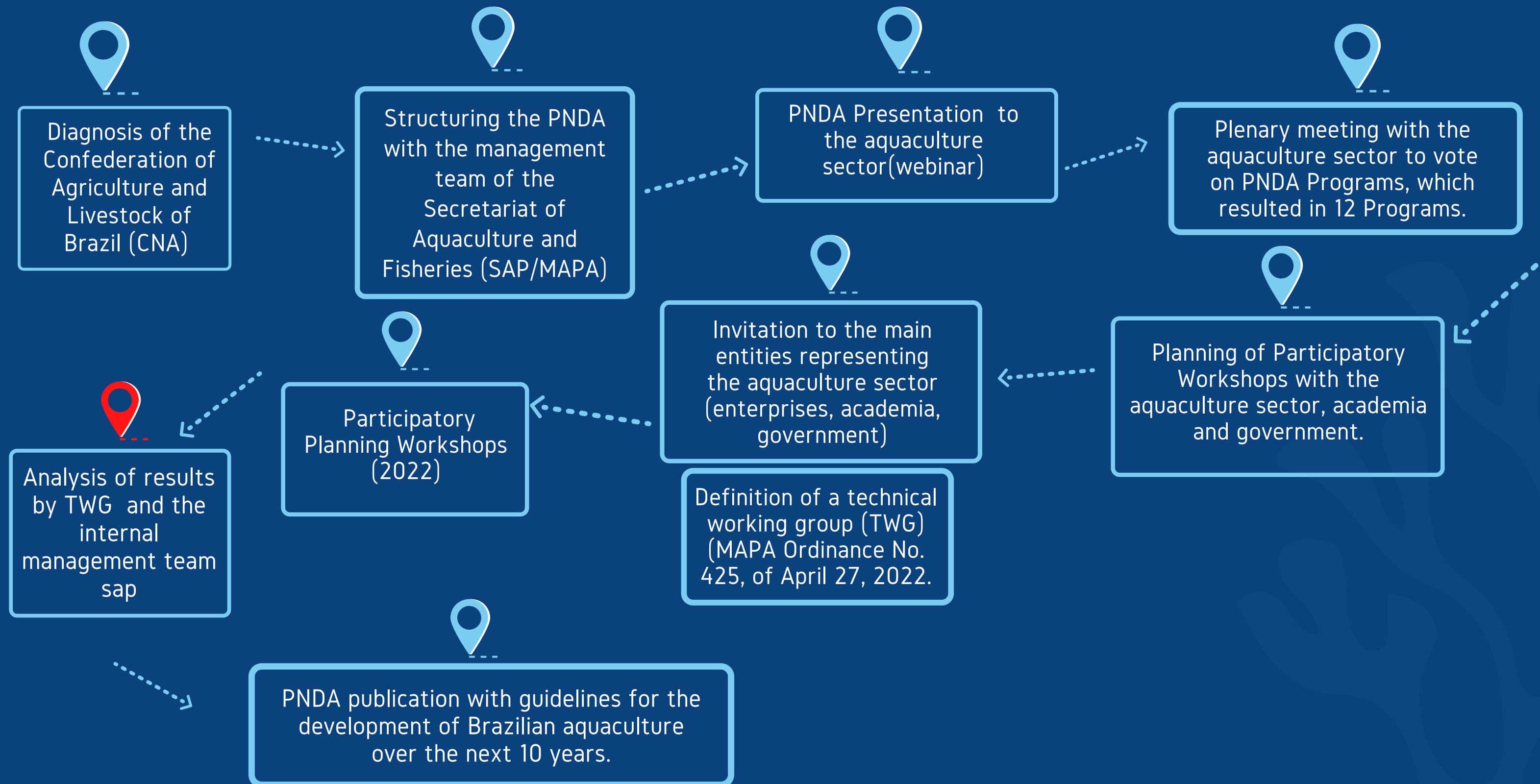
12-Aquaculture Promotion and Insurance Fund Program.



## Programs icons

We developed icons to each Program. These icons serve to identify and communicate the Programs in a visually. Another characteristic for the icons is to express that all Programs are based on the pillars of sustainability and support the 17 Sustainable Development Goals of the United Nations (UN).

# Timeline



## AS OFICINAS

- The participatory workshops were held throughout 2022, through 4 meetings per program, and totaled around 144 hours of work;
- Participation of the aquaculture sector, represented by 44 national entities;
- Internal DPOA/SAP team for the management of the PNDA;
- Results evaluation of the workshops by the Technical Working Group (TWG), created by MAPA Ordinance No. 425, of April 27, 2022 and composed of 7 MAPA secretariats (SAP, SAF, SPA, SDI, SDA, SCRI, SEAF).



# WORKSHOPS

- The purpose of the Workshops was to establish goals, targets and actions for each PNDA program;
- The SMART methodology suitable to the activities was applied;
- The tool used to conduct the work was Jamboard.

Oficina 4 - Programa 9

## Sala - 4ª Oficina - (P 09)

**OBJETIVO 2:** Adotar estratégias de Marketing e Comunicação voltadas ao consumidor final, agregando valor aos produtos provenientes da aquicultura por meio da divulgação de informações sobre a origem do pescado e seu diferencial como agronegócio.

**META:**

**Desenvolver uma campanha por ano, a nível nacional, a partir de 2024, desmitificando o efeito negativo da atividade para o meio ambiente e para a saúde do consumidor.**

**AÇÕES:**

- Elencar quais os "mitos" que impactam de forma negativa na percepção do consumidor. Responsáveis: SAP/MAPA, EMBRAPA, SEBRAE (rede de restaurantes). Prazo: até final de 2023.
- Elaboração de uma pesquisa junto ao consumidor final e formadores de opinião (ambientalistas, imprensa, fornecedores, donos de restaurantes, outros) identificando os mitos existentes na percepção dos
- Estabelecer um calendário anual sobre o mito que deve ser combatido, conforme contexto atual.
- Definição dos meios de comunicação que serão utilizados na campanha.
- Elaboração de ações de comunicação que demonstrem o diferencial dos produtos provenientes da aquicultura (exemplos reais mostrando origem do pescado). Responsáveis: SAP/MAPA, SFAs,
- Selo de qualidade
- Ações de MKT nos pontos de venda de pescados direcionadas por região.
- Levantar formadores de opinião e fazer ações de comunicação direcionadas por região. Responsáveis:
- Visitas de ambientalistas para piscicultura.

## POST WORKSHOP ANALYSIS

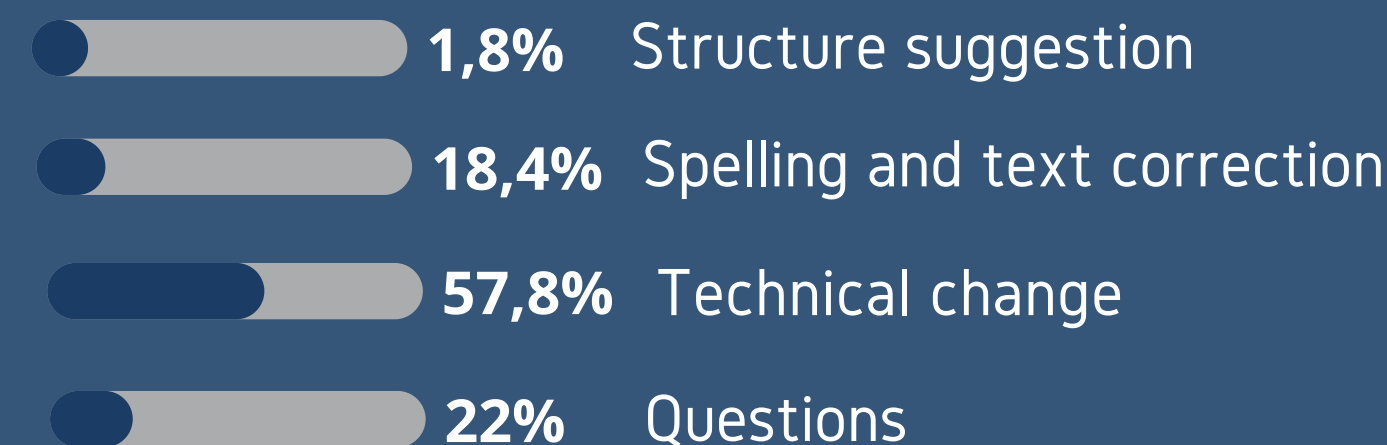
(TECHNICAL WORKING GROUP - TWG PNDA)



- 6 meetings, totaling 24 hours of work;
- Composition:
  - Secretariat of Aquaculture and Fisheries - SAP/MAPA;
  - Secretariat of Innovation, Sustainable Development and Irrigation - SDI/MAPA;
  - Secretary of Commerce and International Relations - SCRI/MAPA;
  - Secretary of Agricultural Defense Department - SDA/MAPA;
  - Secretary of Agricultural Policy SPA/MAPA;
  - Special Secretariat for Land Issues - SEAF/MAPA;
  - Secretariat of Family Agriculture and Cooperativism - SAF/MAPA.

N° CONTRIBUTIONS: 109

### ANALYSIS TYPE



Source: GTT working document

# POST-WORKSHOP ANALYSIS

(INTERNAL MANAGEMENT TEAM)



## HIGH NUMBER OF GOALS AND ACTIONS

- The freedom in the use of brainstorming caused an excess of thoughts and ideas;
- Many participants from different sectors, with different opinions;
- There was no need to limit the number of objectives, targets and actions in the programs;
- Infeasibility of time to review the programs.

Programa	Objetivos	Metas	Ações
1 - Programa de Regularização Ambiental e Fundiária	4	5	27
2 - Programa de Geração e Gestão de Dados e Informações Aquícolas	1	4	14
3 - Programa de Modernização da Aquicultura Brasileira	7	14	32
4 - Programa de Desenvolvimento da Aquicultura Ornamental	7	25	64
5 - Programa de Ordenamento da Aquicultura em Águas da União	5	12	30
6 - Programa de Apoio à Pesquisa, Inovações Tecnológicas e Extensão	4	7	14
7 - Programa de Sanidade Aquícola	4	8	33
8 - Programa de Atração de Investidores para Aquicultura	5	14	34
9 - Programa de Marketing e Comunicação	2	9	36
10 - Programa de Sustentabilidade, Serviços Ecossistêmicos e Mudanças do Clima	6	10	22
11 - Programa de Exportação de Produtos da Aquicultura Brasileira	7	10	27
12 - Programa de Fundo para Fomento e Seguro Aquícola	4	7	21
<b>Total</b>	<b>56</b>	<b>125</b>	<b>354</b>

## SIMILARITY BETWEEN PROGRAMS AND THEIR OBJECTIVES

- It was observed that many Programs converge and present several similar themes in the different goals and actions.
- The management team questioned the need to maintain the 12 Programs;
- Proposal to structure the Plan in thematic axes or in strategic actions.

## POST-WORKSHOP ANALYSIS

(INTERNAL MANAGEMENT TEAM)



2 - Dados	3 - Modern.	5 - ADU	6 - Pesq.Ext	8 - Inv.	9 - Mark.	10 - Sust.	11 - Export	12 - Fundo
O1M2	O1M2	O3M1	O2M1	O2M2	O1M1	O1M1	O2M2	O3M1
O1M3	O1M3	O3M2		O4M1	O1M4	O1M2	O3M1	O4M1
	O2M3			O4M2	O2M1	O1M3	O3M2	
				O4M3		O1M4	O6M1	
						O2M1		
						O2M3		
						O3M1		
						O4M1		
						O5M1		
						O5M2		
						O6M1		

Ex. Program 10 and some similarities between other Programs

**NEXT STEPS:** • Preparation of the final document (writing and structuring)

# Thank you!

## Contact responsible team

internal management team

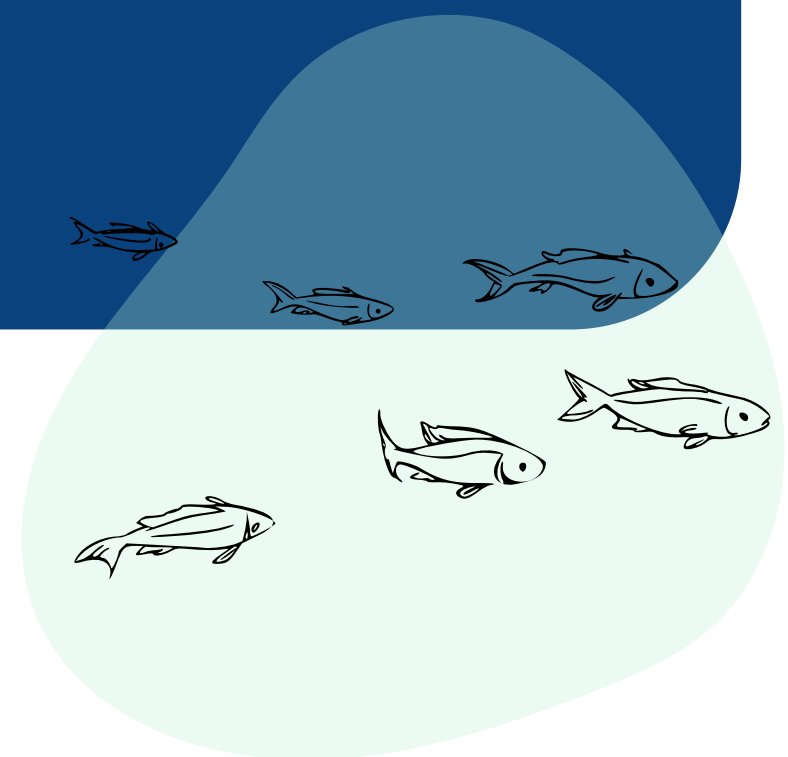
E-mail: [ordenamento.depoa@agro.gov.br](mailto:ordenamento.depoa@agro.gov.br)

Phone: +55 (61) 3276 - 4365

Brasília, 2022

Ministry of Agriculture, Livestock and Food Supply - MAPA

Secretary of Aquaculture and Fisheries - SAP







# FUNDO PRIVADO AGROPECUÁRIO



## O que é

O Fundo Privado Agropecuário é um fundo que visa à promoção, proteção e inovação das cadeias produtivas do agronegócio. É formado pela união voluntária de agentes privados do setor produtivo (produtores e processadores), que atuam por meio de uma Associação juridicamente constituída.

## Objetivos

- Prevenir ou solucionar problemas emergenciais do setor produtivo.
- Financiar atividades que resultem em impacto coletivo, com mais agilidade e sem a dependência de recursos públicos.
- Assegurar, ao setor produtivo, uma fonte de financiamento permanente para promoção, proteção e inovação do setor.
- Fortalecer a posição e ampliação do setor nos mercados interno e externo.
- Viabilizar parcerias com outras organizações privadas e públicas em benefício do setor.
- Estimular o desenvolvimento de novos usos e novos mercados para matérias-primas específicas.



## Como criar

Constitua uma Associação exclusivamente para gerir o fundo. A Associação deve:

- Ter, no mínimo, 10 (dez) integrantes.
- Ser de adesão voluntária.
- Atender ao Código Civil, arts. 53 a 61.

Elabore um Estatuto Social, com regras bem definidas sobre o funcionamento da Associação nos aspectos administrativos e financeiros. Recomenda-se:

- Atender ao Código Civil, arts. 46 e 54.
- Mostrar claramente no tópico *Objetivo* o motivo da criação da Associação.
- Estabelecer as atribuições dos membros e os critérios para sua filiação ou designação, quando se tratarem de cargos gerenciais.

Realize uma assembleia geral para a constituição da Associação e a eleição dos representantes que terão atribuições no seu gerenciamento. Nesse processo, deve-se:

- Fazer o registro da constituição da Associação em ata.
- Eleger os titulares da Diretoria e dos Conselhos de Administração e Fiscal.

Busque nesse processo eletivo fortalecer a representatividade dos participantes/representantes da cadeia produtiva, para ampla contribuição técnica e operacional ao fundo privado.

- Verificar a condição legal dos eleitos, a fim de evitar que associados com impedimentos legais ou restritivos assumam cargos de gestão.
- Registrar o Estatuto Social em um Cartório de Títulos e Registro Civil de Pessoa Jurídica.
- Providenciar o Cadastro Nacional de Pessoa Jurídica (CNPJ).

## Como gerir

- Estipular um valor de contribuição financeira para o associado.
- Depositar a contribuição financeira em uma conta corrente jurídica criada exclusivamente para a gestão do fundo.

A conta pode ser gerida por uma fundação de apoio já existente e bem conceituada. A vantagem é que o fundo não precisará ter sede física ou própria, nem funcionários para realizar as atividades operacionais. Todo o processo administrativo seria terceirizado de forma transparente, ágil, focado e desvinculado de qualquer filiado ou organização.

- Destinar todo o recurso às atividades de promoção, proteção, desenvolvimento e inovação do setor.
- Atribuir ao Conselho Deliberativo o poder de definir sobre onde, como, quanto e quando investir. A decisão deve ser aprovada em assembleia.
- Viabilizar o recebimento de contribuições técnicas de instituições privadas e públicas de pesquisa, ensino e extensão, desde que aprovadas em assembleia ou em resposta a Editais específicos delineados para este fim.



## Contribuição financeira dos associados

A contribuição financeira dos associados ao fundo deve ser acessível e proporcional ao faturamento de cada um, de modo que participem tanto pequenos, médios e grandes produtores, quanto cooperativas e empresários. As contribuições anuais podem corresponder a um pequeno percentual (por exemplo, 0,01%) do valor bruto obtido ao final de cada ano, pela comercialização dos produtos agropecuários, objetos do setor para o qual o fundo foi criado.

## Participação das cadeias produtivas

A construção e a manutenção de uma imagem forte, por meio de um programa de promoção agropecuária, dependem de recursos adicionais que estão na contramão das políticas públicas de ordem fiscal. Conscientes dessa necessidade, da severidade dos problemas e das consequências de não se buscar com agilidade uma solução, os produtores devem investir em estratégias de endomarketing, criando canais de comunicação e promovendo ações internas de engajamento, com a presença de lideranças positivas e inspiradoras.



**Embrapa** - Parque Estação Biológica (PqEB)

Av. W3 Norte (Final), Edifício Sede - 70770-901 Brasília, DF - [sac@embrapa.br](mailto:sac@embrapa.br)

*Abril/2020*

*Tiragem: 2.000 exemplares*

CGPE XXXX



MINISTÉRIO DA  
AGRICULTURA, PECUÁRIA  
E ABASTECIMENTO



**FNAP**  
FÓRUM  
NACIONAL  
AQUICULTURA  
E PESCA





As entidades signatárias deste documento se reuniram no **Fórum Nacional da Aquicultura e Pesca - FNAP** e respeitosamente apresentam a importância deste setor para o agronegócio brasileiro e mundial, com sua notável capacidade produtiva e de geração de renda, assim como, sua necessidade em estabelecer uma política de Estado consistente para um ambiente de negócios justo, próspero e competitivo.

**A proteína de origem animal mais consumida e comercializada do mundo é o PESCADO!**

De acordo com a Organização das Nações Unidas para a Alimentação e a Agricultura - FAO, o consumo atual desta proteína é de 20,5 kg/hab./ano e o valor de suas trocas comerciais ultrapassa **US\$ 164 bilhões** a cada ano, ou seja, 51% do total de todas as proteínas de origem animal comercializadas no mundo.

É inquestionável que o consumo de produtos da aquicultura e pesca continuará crescendo, não apenas em função do aumento da população mundial, mas também da maior conscientização dos consumidores sobre a importância de hábitos alimentares saudáveis e sustentáveis. Para 2030, a FAO projeta um consumo de 21,5 kg/hab./ano e com este pequeno aumento, de apenas 1 kg/hab./ano, haverá a necessidade de produzir-se anualmente **mais 28 milhões de toneladas** de pescados para atender essa demanda.

Hoje, nosso setor tem grande relevância social e econômica para o Brasil:

**4 milhões** de famílias de pescadores;

**1 milhão** de famílias de aquicultores;

**16 mil** trabalhadores diretos e indiretos nas indústrias de processamento;

**R\$ 25 bilhões de PIB** gerado pela aquicultura e pesca;

**1,7 milhão de toneladas** produzidas por ano;

**US\$ 400 milhões em exportações;**

**Crescimento anual de 10%.**

Esses números refletem, discretamente, o potencial das águas produtivas neste país. O Brasil possui a maior reserva de água doce do mundo (13% do total mundial), mais de 8.500 km<sup>2</sup> de costa marítima, 10 milhões de águas continentais para produção e 4,5 milhões de km<sup>2</sup> de Zona Econômica Exclusiva.

Além de privilegiadas características geográficas, o Brasil possui condições climáticas imensamente favoráveis para um desenvolvimento sustentável neste setor: centenas de espécies aquáticas de alto valor comercial; abundância de grãos para produção de ração; profissionais altamente capacitados; e pesquisadores de renome mundial. Tais características nos posicionam entre aqueles países com as melhores condições no mundo para o exercício da aquicultura e pesca.

Ao representar a maior esperança para a segurança alimentar da população mundial, este segmento apresenta grandes oportunidades de negócios e capacidade para geração de emprego e renda. Investir e fomentar a aquicultura e a pesca é estratégico para o Brasil.

Com políticas públicas focadas para desenvolvimento sustentável e competitividade será possível alcançar a segurança jurídica necessária para tornar o Brasil um dos maiores produtores de pescado do mundo.

Reforçando votos de estima e confiança neste país, apresenta-se em única voz, os **Compromissos para a Competitividade da Aquicultura e Pesca Brasileiras.**





# COMPROMISSOS PARA AQUICULTURA E PESCA COMPETITIVAS:

**1. Fortalecimento de órgão autônomo, vinculado ao MAPA, para gestão e fomento da Aquicultura e Pesca;**

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**2. Política de Estado específica para o desenvolvimento da Aquicultura e Pesca;**

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**3. Modernização da legislação Pesqueira e Aquícola;**

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**4. Apoio a reforma tributária com adoção de isonomia dos tributos entre as proteínas de origem animal;**

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**5. Criação de linhas de crédito e seguros que atendam às necessidades específicas do setor;**

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**6. Execução do Programa Nacional de Subvenção do Óleo Diesel para embarcações pesqueiras;**

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**7. Retomada do Sistema Nacional de Estatística Pesqueira e Aquícola e do Programa Nacional de Rastreamento de Embarcações por Satélite (PREPS); e**

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**8. Criação do Código de Conduta do Auditor Fiscal Federal Agropecuário.**

# FNAP

## FÓRUM NACIONAL AQUICULTURA E PESCA



### ENTIDADES SIGNATÁRIAS



# ALL-ATLANTIC OCEAN RESEARCH ALLIANCE

Creating an Atlantic Ocean Community by Implementing the Galway and Belém Statements

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