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Title:	Regional Aquaculture Assessment, and Pacific Regional Aquaculture Strategy
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<p>Summary:</p> <p>A Regional Aquaculture Assessment has been conducted in response to the stated need of the PICTs to address numerous challenges that continue to deny the Pacific region the long- term benefits that can be derived from the development of sustainable aquaculture. These challenges are limiting the extent of the contribution of the aquaculture sector to employment, food security, livelihoods, environmental protection and economic growth.</p> <p>The main finding in the Assessment is that the Pacific aquaculture sector has great socio-economic value and economic potential, but remains largely under-developed. There are many reasons for this, and they are not limited only to matters of technical capacity.</p> <p>Next step is implementation of HoF13 Decision 13(c) to develop the new regional aquaculture strategy. This requires a process that is as inclusive and consultative as possible (taking into account adaptive measures regarding the on-going COVID-19 pandemic) and which has been endorsed by members.</p> <p>Recommendations:</p> <p>WP6 outlines the progress by FAME in response to the HoF13 and RTMCFA4 decisions. Informed by the findings of HoF13 IP14 Day 3 discussion group notes and HoF14 IP12 <i>Regional Aquaculture Assessment</i>, members are invited to discuss and then:</p> <ol style="list-style-type: none"> a. endorse IP12 Regional Aquaculture Assessment for use as a guide on members’ priority issues in aquaculture that can inform the development of a Pacific Regional Aquaculture Strategy; b. provide feedback (up to 2 weeks after HoF14) on any key issues, objectives, constraints, omissions, or further points stemming from the contents of IP12 Regional Aquaculture Assessment to inform the development of the Pacific Regional Aquaculture Strategy; and c. confirm (with amendments as necessary) the proposed process and timeline to develop the new Pacific Regional Aquaculture Strategy that can guide and support the aquaculture aspirations of members, building on the region’s needs, strengths and experiences. 	

Background

1. At 13th Heads of Fisheries Meeting (HoF13) on 1–4 June 2021, members were invited to consider and discuss Working Paper 5 *Future priorities for Pacific aquaculture development*, for which the SPC Coastal Fisheries and Aquaculture Programme (CFAP) briefed Heads of Fisheries about:
 - emerging issues and current constraints in Pacific aquaculture, such as the global COVID-19 pandemic, that have disrupted supply chains and affected the way technical support is delivered to members;
 - advances in members' capacity in certain areas, such as setting national priorities on species with suitable traits for aquaculture, formulation of national Aquatic Biosecurity Plans, as well as government support to improve aquaculture infrastructure;
 - new technologies and trends that can open up new aquaculture options, innovations, and diversification; and
 - an increasing need to examine aquaculture priorities to be better positioned in the near future for greater resilience to climate change impacts and to adapt to the post-COVID world.
2. The HoF13 *Outcomes* document includes the following decisions by members for the *Future priorities for Pacific aquaculture development*:

13th Heads of Fisheries:

- a) Endorsed the approaches proposed (Working Paper 5) for SPC to address members' ongoing and immediate needs and priorities for the aquaculture sector.
- b) Endorsed the proposed process for FAME to identify and prioritise the region's medium and long-term (5-10 years) aquaculture needs in the post-COVID era, taking into account the input from the breakout session.
- c) Supported the development of a new regional aquaculture strategy, based on the identified medium- and long-term aquaculture needs, to guide and support members' aspirations and build upon the region's strengths and experiences.
- d) Agreed for a draft regional aquaculture strategy to be reviewed by RTMCF4 and presented for endorsement by HoF14.

Progress to implement HOF13 aquaculture decisions

3. In the year since HoF13, CFAP has continued to address members' ongoing and immediate needs and priorities by using the approaches proposed in WP5 of HoF13 and endorsed by members in HoF13 Decision 13(a).
4. For the process endorsed by HoF13 Decision 13(b) to identify the region's medium- and long-term aquaculture needs, on 7 February 2022 CFAP commissioned consultants, Integrated Aquatic Solutions IAS, to conduct an assessment of the aquaculture sector needs and priorities

in the Pacific islands region. Among their many sources was [HoF13 Information Paper IP14](#) which contains a summary of members' Break-Out Group responses to the HoF13 WP5 Recommendation (c)(ii) *suggest the broad topic areas that should be included in the Terms of Reference of a regional aquaculture review*. The completed Pacific Regional Aquaculture Assessment report was submitted by IAS to SPC on 9 May 2022 in fulfilment of HoF13 decision 13(b). The full report is provided to members as [Information Paper IP12 of HoF14](#).

5. To be clear, this report is not an assessment of SPC FAME CFAP's effectiveness in supporting aquaculture in the region, nor does it relate only to CFAP's work plan priorities in aquaculture. Rather, it is an assessment of the Pacific aquaculture sector in its entirety. The scope of the issues reviewed within the Regional Aquaculture Assessment, along with the issues raised by members in HoF13 IP14, is wider than CFAP's traditional mandate of providing technical and policy advice in aquaculture.
6. HoF13 Decision 13(d) called for the draft Strategy emanating from the HoF-endorsed process to go to RTMCF4 for review, and then for the reviewed Strategy to proceed to HoF14 for endorsement. Disruptions to SPC FAME's annual meetings calendar caused by the COVID-19 pandemic were raised with members by CFAP at RTMCF4. Further guidance was sought by SPC both about the substantive aquaculture issues to be covered, and about the assessment process (see RTMCF4 Outcomes document paras. 27-30). RTMCF4 endorsed a modified two-step process whereby:
 - a) the Regional Aquaculture Assessment be presented to HoF14 for discussion and to request its endorsement by Heads, and
 - b) at HoF14 the process and timeline to complete the Regional Aquaculture Strategy be confirmed.

Findings of the Pacific Regional Aquaculture Assessment

7. This Regional Aquaculture Assessment ([IP12](#)) was conducted in response to the stated need of the PICTs to address numerous challenges that continue to deny the Pacific region the long-term benefits that can be derived from the development of sustainable aquaculture. These challenges are limiting the extent of the contribution of the aquaculture sector to employment, food security, livelihoods, environmental protection and economic growth. It is the Pacific aquaculture sector itself that is under assessment, not SPC's delivery of support to members for aquaculture.
8. The main finding in the Assessment is that the Pacific aquaculture sector has great socio-economic value and economic potential within the PICTs region, but remains largely under-developed. There are many reasons for this, and they are not limited only to matters of technical capacity. There is much that can yet be done to improve individual PICTs support for sustainable aquaculture. Regional cooperation offers further opportunities to strengthen the industry.
9. A SWOT (strengths, weaknesses, opportunities, threats) analysis, based upon available information and extensive stakeholder engagement, shows that the strengths and opportunities now existing in aquaculture in the Pacific outweigh the weaknesses and threats.

Further, the weaknesses are internal and can be overcome by PICT government intervention and specific actions to create a more enabling governance environment for aquaculture. Regional cooperation offers opportunities to mitigate many of the current threats. One example is the possibility for sub-regional cooperative agreements for the maintenance of quality brood stock and trans-boundary dissemination of seed for selected priority species. Another example is review of legislation to address a general lack of clarity among members about aquaculture governance arrangements, such as to provide clear and timely bureaucratic pathways for establishment of new aquaculture enterprises.

10. The Assessment highlights the key aquaculture priorities of the PICTs, to the extent reported in interviews with stakeholders and stated in available documents. Lack of capacity remains a fundamental concern, not only in academic understanding of biology but also in on-farm trade skills. There is a need to assess the success of aquaculture projects in a more appropriate way, and to concentrate on methods and species that are known to work. The Pacific aquaculture sector is very data-deficient, impacting planning and investment in the sector. The slow uptake of technological advances in both communications and at farm level needs to be addressed.
11. Among the immediate needs of PICTs are improvements in capability and capacity, post-harvest quality control, marketing and biosecurity, as well as addressing feed supply and costs.
12. Identified priority needs include:
 - a) Capacity building in technical and policy areas of aquaculture, including regulatory and MCS frameworks
 - b) Better assessment of feasibility of aquaculture projects and programmes.
 - c) Concentrate on methods and species known (proven) to work, plus unlock opportunities for “extractive” (unfed), “restorative” (improves the environment) and “climate-smart” (resilient and/or sequesters carbon) forms of aquaculture.
 - d) Better data collection, storage, analysis and dissemination.
 - e) Improved equity, and inclusivity for Vulnerable Disadvantaged Groups (Youth, Gender, etc.).
 - f) Regional cooperation needed to overcome common problems and reach critical mass.
 - g) Technology (“T4” – digitalization) should be more widely adopted.
13. Whilst COVID has had an effect on every country and territory in the Pacific, and has impacted aquaculture, it would appear that once the pandemic subsides normality will return relatively quickly. The lessons from COVID need to be learned, and the voice of the aquaculture sector must be heard in national planning for future pandemic responses, however there is no immediate action specifically required for aquaculture.
14. One feature of this Assessment is that views of the aquaculture private-sector were actively sought, in addition to those of PICT governments and administrations. Due to COVID restrictions it was not possible to adequately consult with communities engaged in

aquaculture about their own special needs, however, their needs will to some extent overlap with those of the private-sector, whose priority needs include:

- a) An improved “enabling environment” for aquaculture enterprise establishment and operations.
 - b) Improved access to sources of investment, and financial services like insurance.
 - c) Improved financial literacy, leadership and business skills.
15. The development and implementation of a Regional Aquaculture Strategy will strengthen the capacity of PICTs and the private sector to harmonise their development and investment plans, enhancing their ability to cooperate and trade regionally and with the rest of the world.
16. Objectives for the Strategy suggested by the Assessment (further elaborated in its Appendix II) provide a broad indication of what a Pacific Regional Aquaculture Strategy could tentatively look like:
- Mainstream aquaculture into the economic and social development agendas of PICTs
 - Increase aquaculture production of edible and non-edible aquatic products for income and food security in the commercial, community and small holder subsectors
 - Improve capacity and capability in the aquaculture sector
 - Improve aquatic biosecurity in the region
 - Assess the resilience of aquaculture to climate change and other natural disasters in the region and develop outline plans for mitigating measures.
 - Improve market access & supply chains
 - Enhance quality of post-harvest products
 - Establish regional cooperative institutional frameworks
 - Mainstream cross cutting issues such as health, environment, and gender in the whole aquaculture value chain throughout the region

Process for a Pacific Regional Aquaculture Strategy

17. Moving forward, the next step is implementation of HoF13 Decision 13(c) about development of a new Pacific regional aquaculture strategy. This requires a process that is as inclusive and consultative as possible (taking adaptive measures regarding the on-going COVID-19 pandemic) and has been endorsed by members, to ensure delivery of a Pacific Regional Aquaculture Strategy that is truly a “members’ Strategy”.
18. The output from the Regional Aquaculture Assessment and its suggested future directions, objectives, priorities, and processes, will inform the consultations with members and stakeholders towards the development of a Pacific Regional Aquaculture Strategy.
19. Below is a suggested process and timeline to further develop and finalise a mid- to long-term Pacific Regional Aquaculture Strategy for the PICTs.

From June 2022 onwards:

- i. SPC FAME presents to HoF14 a suggested process and timeline for development of the Pacific Regional Aquaculture Strategy, for discussion, amendment, and confirmation by members.
- ii. Funding and the support of donor partners is sought by SPC based on the HoF decision.
- iii. SPC to initiate the process by contacting fisheries departments in PICT governments and administrations, to advise as to the next steps which are:

June to October 2022 (HoF14 to RTMCFA5)

- iv. Initial virtual consultations with individuals in aquaculture departments and divisions.
- v. Agreement sought (and obtained) for in-country needs and direction analysis for the Pacific Regional Aquaculture Strategy and appointment of a government focal point for stakeholder consultations in each member.
- vi. Identification of key stakeholders, both primary and secondary, carried out by focal point/s with SPC (brainstorming sessions).
- vii. Consultations with stakeholders. The member focal point/s can undertake consultations if limited to a series of individual interviews. In larger PICTs with more complex aquaculture activities, the focal points conduct one day workshops assisted, if necessary, by facilitators recruited by SPC. Country based secondary stakeholders are included in the consultations.
- viii. Three sub-regional workshops (hybrid in-person/virtual format to ensure inclusiveness) convened in geographically central locations to consolidate the results of the in-country consultations, and to involve sub-regionally based secondary stakeholders.
- ix. The results of the 3 sub-regional workshops are consolidated by SPC into a Draft Pacific Regional Aquaculture Strategy which is distributed to all PICTs for further comment.
- x. A review and validation session for the draft Pacific Regional Aquaculture Strategy is incorporated into the 5th Regional Technical Meeting on Coastal Fisheries and Aquaculture (RTMCFA5) and further adjustments made to the Draft Pacific Regional Aquaculture Strategy document as necessary.

October 2022 to March 2023 (RTMCFA5 to HoF15)

- xi. Draft Pacific Regional Aquaculture Strategy and a supportive Draft SPC Pacific Regional Aquaculture Policy Brief are distributed to all SPC members for them to further distribute internally to all stakeholders, who make further comments as appropriate, which are incorporated in the final draft documents.
- xii. Draft Pacific Regional Aquaculture Strategy and a supportive Draft SPC Pacific Regional Aquaculture Policy Brief are presented to HoF15 meeting for final review and approval.

March to July 2023 (HoF15 to RFMM4)

- xiii. The Pacific Regional Aquaculture Strategy and the supportive SPC Pacific Regional Aquaculture Policy Brief approved by HoF15 are presented to the 4th Regional Fisheries Ministers Meeting for endorsement.
- xiv. The Pacific Regional Aquaculture Policy is launched throughout the region with media coverage and publicity.
- xv. Members proceed to implement the Pacific Regional Aquaculture Strategy, assisted by regional institutions and partners.

Recommendations

WP6 outlines the progress by FAME in response to the HoF13 and RTMCFA4 decisions. Informed by the findings of HoF13 IP14 *Day 3 discussion group notes* and HoF14 IP12 *Regional Aquaculture Assessment*, members are invited to discuss and then:

- a. **endorse** [IP12](#) *Regional Aquaculture Assessment* for use as a guide on members' priority issues in aquaculture that can inform the development of a Pacific Regional Aquaculture Strategy;
- b. **provide feedback** (up to 2 weeks after HoF14) on any key issues, objectives, constraints, omissions, or further points stemming from the contents of [IP12](#) *Regional Aquaculture Assessment* to inform the development of the Pacific Regional Aquaculture Strategy;
- c. **confirm** (with amendments as necessary) the proposed process and timeline to develop the new Pacific Regional Aquaculture Strategy that can guide and support the aquaculture aspirations of members, building on the region's needs, strengths and experiences.