

Strengthening the Institutional Capacity of AMAQUA

To better represent the aquaculture industry in Mozambique



| Consultant |



| Beneficiary |



| Implementers |



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Program Title

Strengthening the institutional capacity of AMAQUA to better represent the aquaculture industry in Mozambique

Contractor

Trade Forward Southern Africa Programme (TFSA)

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Acronyms

ADNAP	Administração Nacional das Pescas / National Fisheries Administration
AMAQUA	Associação Moçambicana de Aquacultura / Mozambican Association for Aquaculture
AT	Autoridade Tributária / Tax Authority
BoD	Board of Directors
CTA	Confederação das Associações Económicas / Confederation of Economic Associations Mozambique
EDA	Estratégia de Desenvolvimento da Aquacultura / Aquaculture Development Strategy
EDM	Electricidade de Moçambique / Electricity of Mozambique
EIA	Estudo de Impacto Ambiental / Environmental Impact Study
ES	Executive Secretary
EU	European Union
FIPAG	Fundo de Investimento e Património do Abastecimento de Aguas / Water Supply Investment and Heritage Fund
GA	General assembly
IFAD	International Fund for Agriculture Development
INIP	Instituto Nacional de Inspeção de Pescado / National Institute for Fish Inspection
IVA	Imposto sobre Valor Acrescentado / Value Added Tax
MEF	Ministério da Economia e Finanças / Ministry of Economy and Finance
MIC	Ministério da Indústria e Comércio / Ministry of Industry and Commerce
MIMAIP	Ministério do Mar, Águas Interiores e Pescas / Ministry of the Sea Inland Waters and Fisheries
MoU	Memorandum of Understanding
MozRural	Projecto de Economia Rural Sustentável / Sustainable Rural Economy Project
MTA	Ministério da Terra e Ambiente / Ministry of Land and Environment
PM/CM	Potential Members/Current Members
POLMAR	Política e Estratégia do Mar / Sea Policy and Strategy
ProAzul, FP	Fundo de Desenvolvimento da Economia Azul / Blue Economy Development Fund
PRODAPE	Projecto de Desenvolvimento da Aquacultura de Pequena-Escala / Small-Scale Aquaculture Development Project
RAQUA	Regulamento de Aquacultura / Aquaculture Regulation
REJUEM	Regulamento que Estabelece o Regime Jurídico de Utilização do Espaço Marítimo / Regulation Establishing the Legal Regime for the Use of Maritime Space
SADC	Comunidade de Desenvolvimento da Africa Austral / Southern African Development Community
SFG	Stakeholders Focus Group
TOR	Terms of Reference
TFSA	Trade Forward Southern Africa
WB	The World Bank

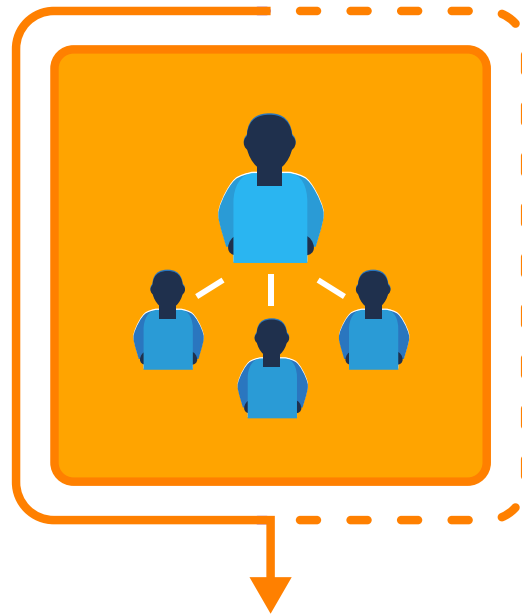
Introduction

The primary purpose of these toolkits is to provide a guiding reference which have been split in two dimensions to allow AMAQUA to strengthen its institutional capacity over the next three years, namely:



Dimension 1

Assist AMAQUA to strengthen internal capacity & membership



Dimension 2

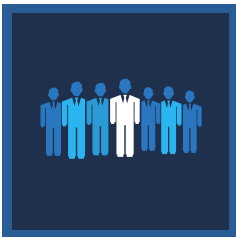
Deliver essential services for potential beneficiaries



Dimension 1

Assist AMAQUA to strengthen internal capacity & Membership

Interviewed tilapia farmers demonstrated a keen interest in joining the association, however lack of clarity as to what it does, and potential benefits presented a challenge when inquiring further about their commitment to join. AMAQUA is already taking steps to re-invigorate the association and create an evidence base to enable the recruitment of additional members. This section will highlight recommendations of essential steps that need to be taken in order to revitalize AMAQUA and increase membership recruitment, such as:



Re-establishing the office with at least an Executive Secretariat (ES) appointed to lead and operationalize the solutions proposed in the toolkits.



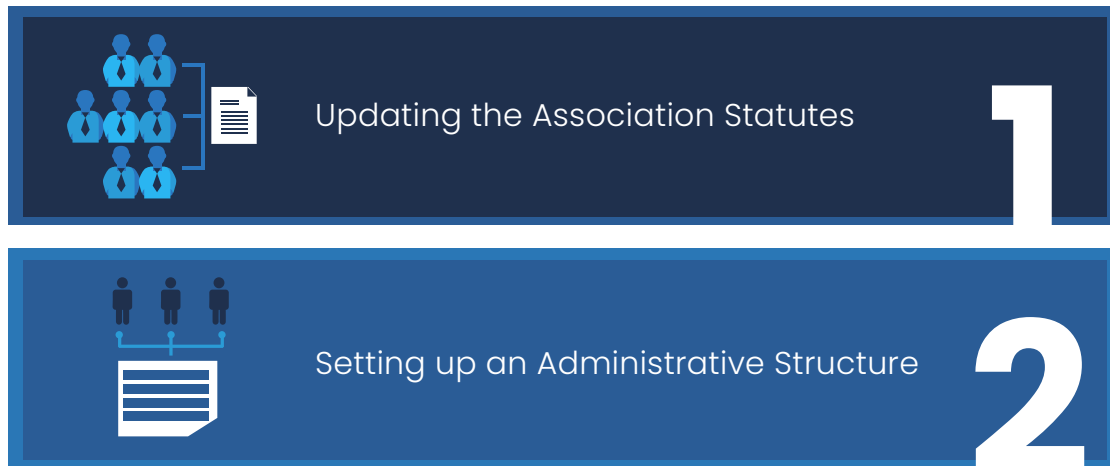
Ensuring functional organizational mechanisms for successful operations at least establishing an industry development team (Stakeholder Focus Group. SFG).



Developing the ability to mobilize resources for the implementation.

Organizational Structure

There is a need to ensure that AMAQUA is fully compliant with Mozambican association legislation. In addition, many of these requirements are simple guidelines for the optimal operation of the association. Some examples of issues to address include:

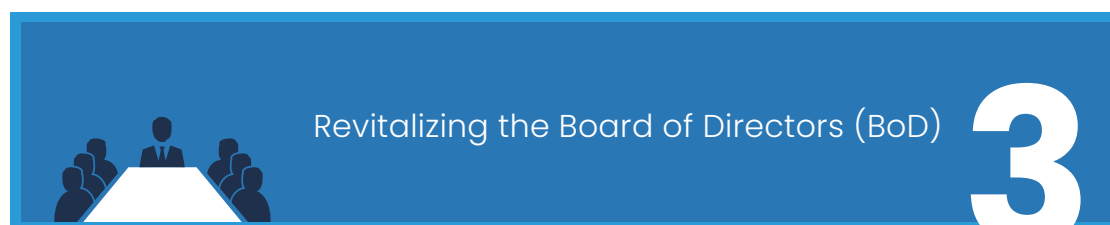


Recruiting an Executive Secretary (ES)

- The ES would be responsible for the front desk of AMAQUA, daily management of operations, and ensuring consistent communication flow.
- Develop a clear Terms of Reference /Job Description for the position.

Establishing a Stakeholder Focus Group (SFG)

- The SFG would comprise of influential tilapia farmers¹ and be responsible for discussing and prioritising key actions to strengthen the tilapia and aquaculture industry in Mozambique, and monitoring the implementation of the toolkits.
- Develop TOR /Job Description for SFG.



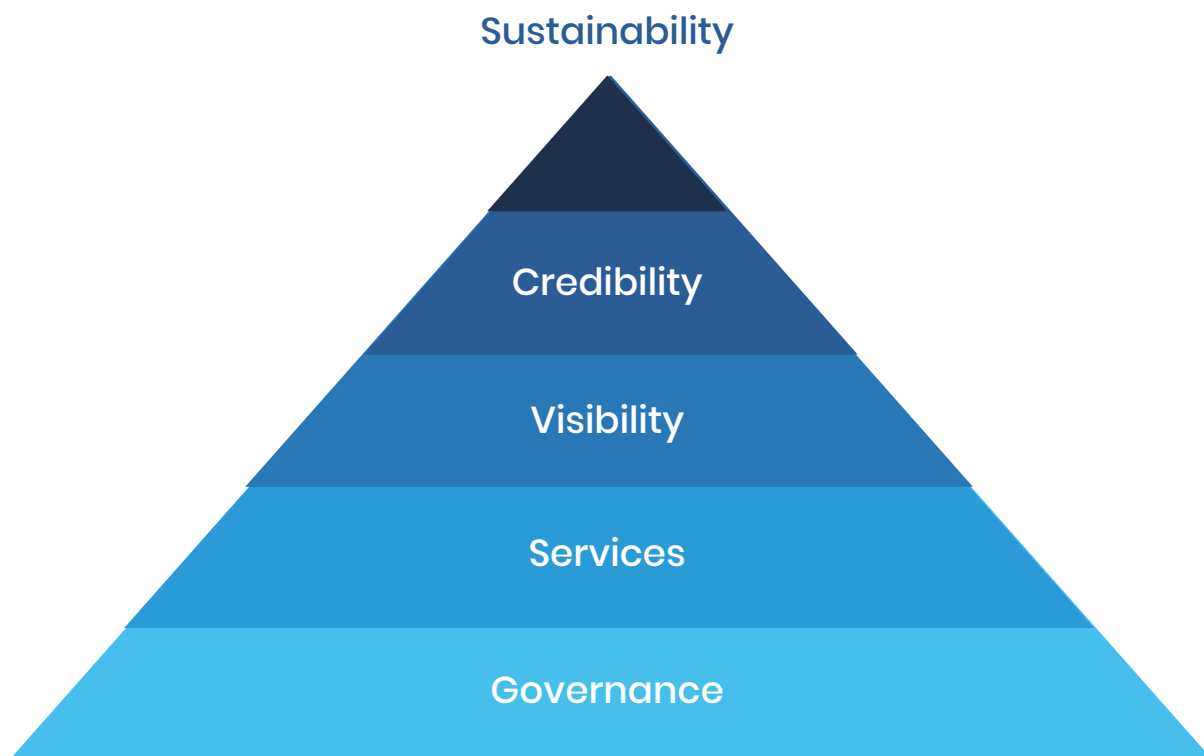
The BoD will be responsible for setting strategy and overseeing management.

The BoD may in the interim be appointed by current AMAQUA members, however, once the association reaches quorum (as established in the statutes) an annual general meeting should be held for elections.

¹ As well as key aquaculture players for the longevity of the association..

Figure 1: The Organizational Sustainability Pyramid

A simple model that can guide the priorities of how to strengthen AMAQUA is the Sustainability Pyramid.



■ **Credibility**

AMAQUA members need to believe in its vision, mission and objectives.

■ **Visibility**

AMAQUA needs to increase its visibility amongst the industry and beyond.

■ **Services**

AMAQUA's services need to be member-centric as well as strategic to the organization's overall vision.

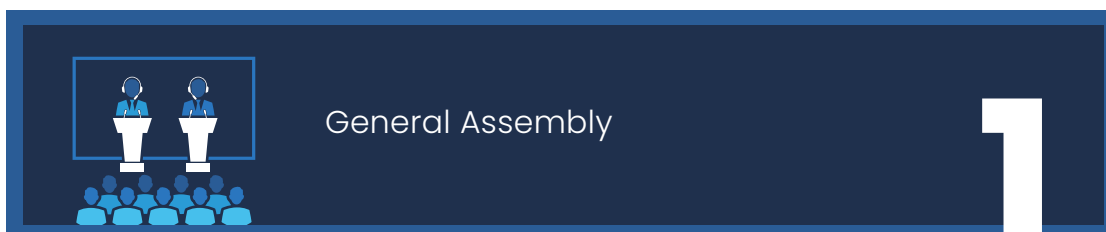
■ **Governance**

AMAQUA's governance needs to be structured and transparent.

Source: The Business Association Development Guidebook, Edge Project/USAID.

Strategic Planning

The importance of strategic planning is to have a clear vision, mission, and roadmap for the next three to five years of the organization.



The current membership should hold a “general assembly” to define the strategic priorities of the association.²

A A third party ideally should facilitate this. A sample strategic plan workshop guide is provided in Annex 2.

B With a clear strategic plan, an implementation roadmap should be defined. This will include objectives, tasks, responsibilities, timelines and M&E indicators.

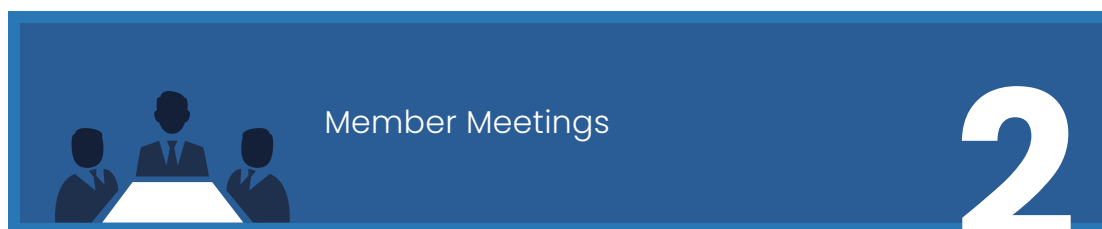
Key areas identified in the research to focus on:

- Information Sharing – Legal & Regulatory, as well as Industry Statistics
- Biosecurity compliance standards/norms
- Production quality, quantities, and schedules
- Access to markets, including sharing export potential trends and the TFSA export readiness toolkit
- Tax regime policy change and preferential rates for water, electricity

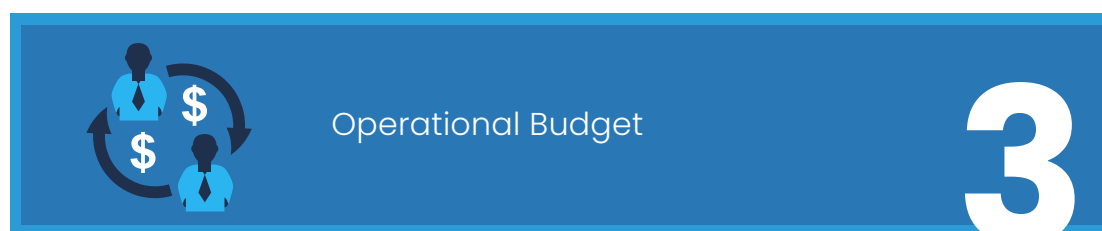
Potential services to develop industry and attract members are indicated in Dimension 2, through the capacity and communication toolkits.

C Given the nature of the association, responsibilities should be shared equitably; on the one hand, this ensures participation of all invested members and on the other, the association can leverage to strengths of members to increase the efficiency in achieving the defined objectives.

² Once an agreed upon quorum is recruited another General Assembly (GA) should be held to share the decisions made in this meeting, and agree to a way forward including the new members.



At a regular frequency, members should meet to evaluate their progress and propose corrective measures when necessary. As well as, update membership on important changes that may affect their industry.



Finally, it is essential that AMAQUA develop an operational budget that takes into account its current approach to financing. Ideally for sustainable associations members should represent a significant contribution of revenues (usually sufficient to cover administrative operational costs).

In a beginning stage they can seek out development partner support to finance additional activities e.g. trainings, expert webinars, workshops (amongst others to be presented in the Capacity toolkit). However, for long-term sustainability AMAQUA needs to develop a business model where their membership can support the majority of its costs, and only seek out punctual sponsorships for specific initiatives.


Membership Recruitment



- The research found that the sector though small is widespread and there are a number of players that remain informal and under the radar, which should be included in the potential membership pool for the association.
- In addition, there is a slight scepticism towards the cost benefit of joining associations that was shared amongst the interviewed. In order to overcome the same, a face to face, or more personal approach should be adopted for membership recruitment.
- Another particular concern that was raised was the capacity of a single association to address nationwide the needs of all the members given their specific geographical and priorities constraints.

Aquaculture Regional Associations 1

An alternative to address the regional specificities of the aquaculture industry, is to consider the option of establishing “regional associations”, where small and medium scale producers can discuss specific issues and channel these to AMAQUA - as an umbrella “national aquaculture association”. Ideally, AMAQUA would consider as a first step (short-term priority) promoting the establishment of regional associations in the most productive geographies, e.g. Manica, Tete and Gaza provinces.



Member Profile

2

Define a desired member profile; this should detail the characteristics that AMAQUA is looking for in its members and account for whether it is limited to tilapia and aquaculture producers or other relevant stakeholders may be included.

- The new aquaculture regulation established the following Aquaculture Classification.

Table 1: Aquaculture Classification (RAQUA)

Parameters	NON-COMMERCIAL	COMMERCIAL		
	Subsistence	Artisanal	Semi-industrial	Industrial
Production Volume	Up to 225 kg/year	>225 a 27,000 kg/year	>27,000 a 135,000 kg/year	>135,000 kg/year
Production System	Extensive	Extensive/semi-intensive	Semi-intensive/intensive	Intensive
Final Use	Family consumption	Family consumption/trade	Trade	Trade

* Classification also includes experimental, research, training, and recreational aquaculture.

- The interviewed tilapia farmers were either artisanal or semi-industrial. AMAQUA representatives expressed interest in focusing on engaging mostly semi-industrial (especially those with potential to grow towards industrial). Nonetheless, they acknowledge the importance of engaging artisanal as well because as the industry grows these would be the future semi-industrialists.
- Furthermore, the industry also comprises of fingerlings and feed producers, ideally these segments should also be involved (some are members already).

Table 1 Source: RAQUA, Annex II – Article 5



Association Presentation

3

Set up a cohesive presentation of the association, including the vision, mission and key objectives for the short/medium term. This presentation may also include a sample of the newsletter described in the Communication toolkit, the latter serves as evidence of the benefits that the association can currently bring. In addition, it should present membership fees & criteria, examples of services that AMAQUA could offer free of charge and examples of services subject to symbolic and/or differentiated fees.



Member Mapping

4

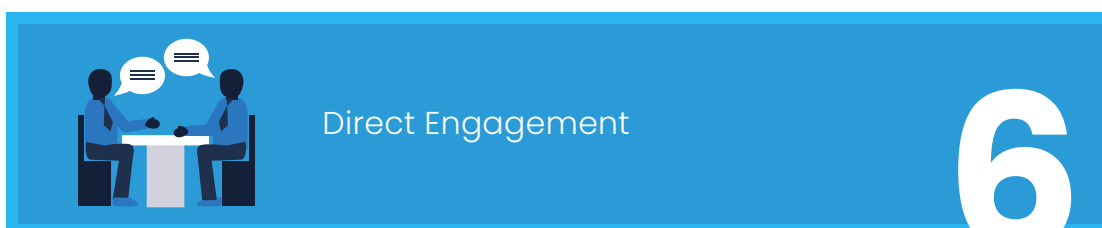
Map the current and potential members, the geographic distribution list from the Key Findings & Insights Report (Annex 3) can serve as a basis to start upon and members may contribute by recommending additional tilapia and aquaculture producers that they may feel fit the desired member profile.



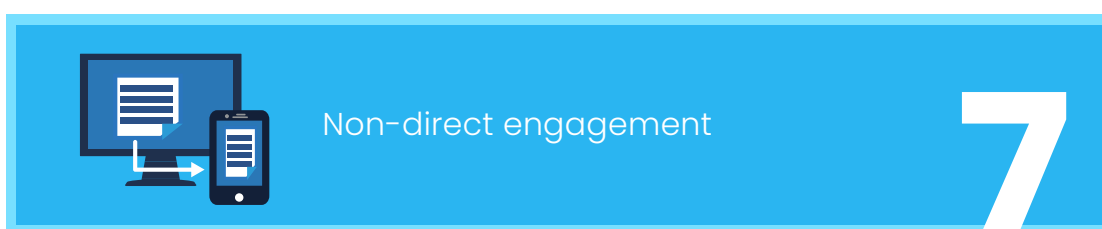
Member Distribution

5

Distribute the potential members (PM) amongst current members (CM) that are in close geographic proximity to engage the potential members.



The secretariat should make initial contact to ensure interest of the PM, and then they would inform the assigned CM to set-up a presentation meeting. Ideally, the CM would also take with them a sign up form³, which the PM can submit back to the secretariat should they decide to join. CM's should also report their assessment of whether or not they believe the PM is likely to join so the secretariat may follow-up, as necessary.



For non-directed engagement's AMAQUA may:

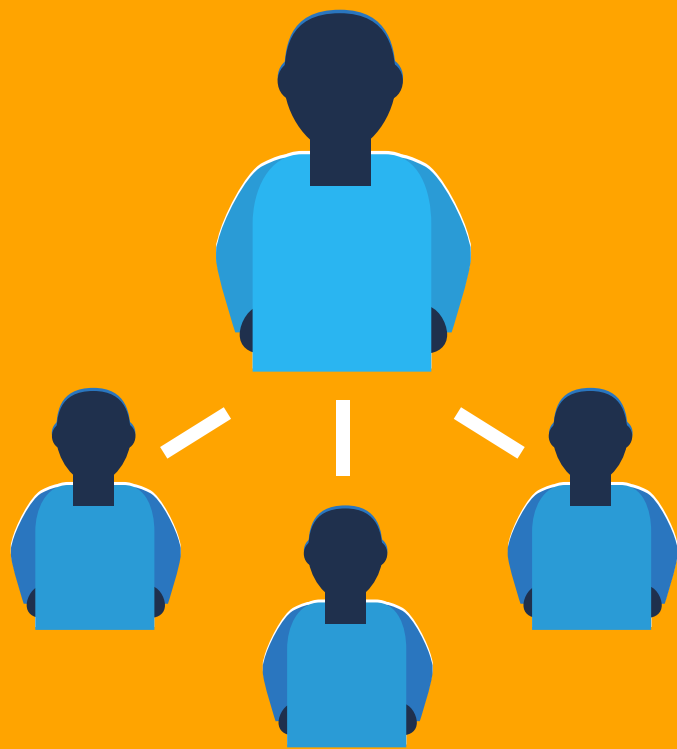
A Leverage their desired public presence (e.g. website/social media/newsletter) to share that they are actively recruiting.

- Key information to be included:
 - Membership criteria
 - Description of AMAQUA and its benefits
 - "How to join?"
 - Contact information to Secretariat⁴

B Share their recruitment desire with opportunity partners, i.e. in a form of quid pro quo, whenever AMAQUA shares a potential opportunity they can request that their membership recruitment desire be shared with opportunity beneficiaries as well (should the beneficiaries fit the membership profile).

³ Note: At the moment, AMAQUA is not charging a membership fee, which may also be attractive to highlight upon sign up. However, for the sustainability of the association, it is necessary to define a business model for the association and establish a future fee structure. An option to consider when developing the fee structure is to apply a tiered fee scale based on producers' size.

⁴ In the future, this can also be a link to a digital form that the secretariat receives.



Dimension 2

Deliver essential services for potential beneficiaries

This section will detail different variables affecting the aquaculture's competitiveness, as discussed in Key Finding & Insights Report. Particularly suggesting potential actions for its improvement informed by the gaps identified and potential ways forward based on the data collection from tilapia producers, government, and development partners.

The section is broken down into the capacity toolkit that looks at providing aquaculture farmers with services to increase their capacity, and the communications toolkit that highlights key information sharing tactics, and a high-level tilapia-branding proposal to increase local demand.

Capacity Toolkit

Key aspects to be addressed in the capacity toolkit include:



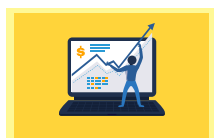
Legal and regulatory framework



Biosecurity compliance across tilapia value chain



Business Environment



Access to markets /Export Readiness

Legislation & Regulatory Framework

Legislation & Regulatory Framework were found by the interviewed tilapia farmers to often be ambiguous, which can be significantly detrimental to aquaculture farmers. Providing timely updates for the members, can allow them to benefit from incentives, avoid undue penalties, and structure a lobbying agenda to further develop the tilapia aquaculture industry.



Audience

Primary: **Aquaculture farmers**

Secondary: **Potential investment stakeholders**



Approach

1

Secretariat should establish a constructive relationship with the varying legal and regulatory bodies that influence the industry.

Examples:

MIMAIP (IDEPA, INIP, ADNAP, licensing, inspections, certification);
MTA (Ministério da Terra e Ambiente, environmental studies, EIA);
MIC (Department of trade - import export);
AT (tax regime department);
MEF (IVA department).

- Develop excel-template listing all issues to be addressed with each department.

2

Through regular engagement secretariat need to ensure that all new legislation passed is shared with AMAQUA membership.

3

The legislation should be summarized for rapid dissemination, as well as creating an archive and share portal for consultation of all members.

- Some key initial policies to address include Fisheries Act, EDA, RAQUA, POLMAR, REJUEM, Inspection & Sanitary Control, Mozambique potential for marine and fresh water aquaculture, but not limited to.

4

The summaries can be shared in summary/highlight form through the same platform that shares industry statistics. However, may follow a different schedule.

A technique that has proven to improve engagement is to set up regular dissemination periods, i.e. sharing an update every quarter creates a reliable pattern of behaviour that members come to expect from AMAQUA, building confidence and familiarity with the association's communication methods.



Biosecurity

Biosecurity compliance was also found to be a concern amongst stakeholders⁵ across the board. On the one hand, there is limited national capacity to provide timely inspection and certification to all current/potential AMAQUA members.



Audience

Aquaculture producers across value chain



Approach

A Biosecurity compliance programme as a long-term but ultimately multi-party beneficial proposal to improve overall national inspection and certification, create an income stream for AMAQUA, and strengthen government relationship with the association. Concisely the concept is to establish AMAQUA as a third-party service provider to INIP that would increase their inspection capacity in particular for aquaculture.

1

INIP is the sole government institution authorised to inspect and certify all fishery products in the country. Given the limitations in reach of this organization, there is potential to consider a third-party service provider.

To establish this, AMAQUA needs to build an argument to negotiate with INIP the requirements and procedures for outsourcing essential biosecurity services.

⁵ Interviewed tilapia farmers, government and development partners.

2

Negotiate the partnership mechanisms (MOU between AMAQUA-INIP), leveraged by the strong liaison relationship proposed in the legal and regulatory recommendations.

3

Draft Terms of Reference for hiring national consultant specialized in aquaculture biosecurity to develop an inspection and training model that AMAQUA can employ and service the aquaculture industry.

- Given the context of Mozambique, one may foresee initial resistance, however this would be a multiparty win if taken on as a long-term objective:
 - i. For aquaculture farmers they could easily access affordable and reliable training or inspection of their production as necessary.
 - ii. For the government their coverage of aquaculture production could be increased, as AMAQUA is more likely to have a slightly more expansive reach.
 - iii. For AMAQUA it can be a reliable income stream that provides revenue and a much-needed benefit that interviewed members have requested for.
- INIP approval and a training participation certification would be essential requirements to validate the reliability and investment of participants.



Biosecurity Plans

Assist farmers in the **development of their biosecurity plans** in a short medium term, AMAQUA can also ensure the dissemination of the new RAQUA biosecurity plan requirements. This activity should be included in the MOU between AMAQUA and INIP.



Audience

Aquaculture farmers across the value chain



Approach

1

Develop a simple adult learning curriculum and training program based on the RAQUA biosecurity plan requirements.

There may be a need for an expert consultant in training (particularly with adult learning experience), as well as a biosecurity expert. In addition, it would be beneficial to highlight alignment with regional and international biosecurity standards as a means to bolster export readiness.

In addition, there may be a number of financial resources involved for mobilizing the program. AMAQUA's existing partners or other stakeholders may be approached to support the successful development of the Program including the Training of AMAQUA Trainers.

2

Share with INIP and relevant MIMAP authorities the intent to share this knowledge with association members and potential members, and secure their buy in around the initiative as part of the MOU between AMAQUA and INIP.

3

Market the training through easy yet widespread communication mechanisms (e.g. WhatsApp/social media).

4

Conduct a pilot run to fine tune the program. Roll out the program once it's been adjusted to lessons learned during the pilot phase.



Lobbying



A number of business environment concerns were highlighted in the project research, namely:

- **Non-preferential rates for local utilities (i.e. electricity and water) companies in comparison to other productive industries;**
- **A non-favourable tax regime in comparison to other productive industries;**
- **High transaction costs due to import duty rates, high logistics costs, just to name a few.**

The above-mentioned examples are some of the easier short-medium term objectives, however AMAQUA should aim to set a long-term lobbying strategy. These can be strengthened as the association grows and becomes more representative, as well as strengthens its ties with government and development partners to present a united vision towards tilapia and overall aquaculture growth. It should be noted that many of the solutions may require advisory services (e.g. fiscal and legal).

Preferential Rates

Negotiate preferential rates with utility companies (e.g. electricity & water) based on volumes of consumption, as association members.



Audience

Utility companies, & Government stakeholder



Beneficiary

Aquaculture farmers across the value chain



Approach

1

Synthesize regime applied in other industries (e.g. agribusiness, poultry, livestock and other relevant productive sectors).

2

Compile aquaculture current volumes of consumption, as association members.

3

Build an argument for lobbying.

4

Identify related government agencies (EDM, Águas da Região de Maputo and FIPAG).

Favourable Terms

Negotiate favourable trade terms (Tax Regime) to address disproportionate incentives received.



Audience

Tax Authority & Government stakeholders



Beneficiary

Aquaculture farmers across value chain



Approach

1

Synthesize tax regime applied to relevant productive sectors (e.g. agribusiness, poultry, fisheries and in specific carapau, aquaculture).

2

Build an argument for lobbying, set priorities and negotiation strategy.

3

Identify related government agencies (AT, MIC, MEF, MIMAIP and CTA).

4

Propose a sample Tax Regime.

Cost Reduction

Explore other conducive avenues to reduce current high operational costs faced by aquaculture industry, specifically:

- Reducing the cost of feed;
- Reducing the cost of logistics to get product to market.



Audience

Aquaculture farmers



Approach

1

Systematize aquaculture feed CIF prices different regions.

2

Negotiate preferential prices.

3

Building buy-in amongst association members.

4

Import aquaculture feed as a group.

5

Acquire refrigerated truck(s) as a group using similar approach.

Export Readiness

At the time of research only a few interviewees expressed export interest. This may also be due to a lack of information on how to access export markets. A short-term solution would be to increase the access to information about regional and international markets.



Audience

Aquaculture farmers



Approach

1

Compile and publicise related information (biosecurity standards) MZ-SADC-EU market, thus contributing to assist farmers willing to access external markets as well as, tracking of trends in regional and global markets and dissemination of these to producers or members to help them make decisions related to pursuing export markets.

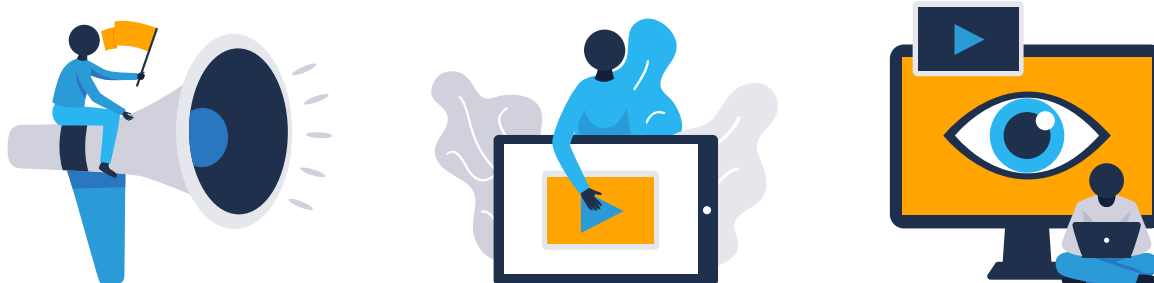
2

As a part of AMAQUA collaboration with TFSA Programme, there is an opportunity to publicise the TFSA Export Readiness Toolkit a simple yet comprehensive checklist that can guide farmers in their export readiness preparation.

3

Provide guidance and liaison services as required.

Communications Toolkit



Information Sharing

This section focuses on disseminating reliable industry statistics and opportunities for aquaculture farms (starting nationally, expanding to SADC, and then internationally).

Over time should AMAQUA adopt a public presence e.g. website / social media / newsletter to increase the outreach of information collected by the association.



Audience

Primary: **Members**

Secondary: **Potential investors**



Approach

Industry Statistics, given that the industry is relatively nascent AMAQUA members can serve as a representative pool for the industry. The priority statistics to be shared regularly include but are not limited to aquaculture classification, source of feed, source of fingerlings, growth technique, growth period, volumes of catch, sizes of catch, gate sale price by size, primary buyers, inspection visits and export readiness / appetite.

1

The secretariat should collect data from members, and complement as much as possible with reliable external sources. A template of what information should be collected is presented in Annex 1.

A Data collection needs to be conducted systematically. It should be part of the terms and conditions of membership to share the information in a timely manner (e.g. within 14 days of request).

B Data collection can be done electronically, via email, survey monkey, but not limited to. This then needs to be tabulated in excel. An additional benefit is that over time, this could become a robust database for industry analysis. However, experience has shown that in many cases follow-up calls, if not, conducting the questionnaire telephonically may be required.

2

Data is then uploaded to the dissemination template, and circulated with the members. At a beginning stage this could be done every semester based on ideal harvest periods, as the industry expands the possibility for more regular updates may be explored.

- Potential platforms include a WhatsApp flyer, email, and the same information can be shared on AMAQUA's website/social media.

3

As a means to increase knowledge transfer and audience, the data collection and analysis could be done in partnership with academia⁶. This could on the one hand reduce the cost of data collection, and more importantly introduce a new partner for AMAQUA to develop evidence-based reports to inform strategic decisions for the industry.

⁶ To be solidified in the form of an MOU.



Approach

Opportunity Sharing, the research found that tilapia farmers have limited information about development initiatives that take place in the country, therefore it would be beneficial to consolidate the same and share with AMAQUA's membership.

1

A few development partners already have financial and non-financial initiatives in place in Mozambique (e.g. IFAD – ProDAPE project, ProAzul – Janela Mais Peixe Sustentável; WB – MozRural project, Norway – CEPAQ, but not limited to). The secretariat should nurture relationships with the same in order to provide their members with timely information in order for them to take advantage of these.

- Key information to make readily available include type of opportunity (financial vs. non-financial), selection criteria, participation requirements, deadlines, and support resources.

2

When new opportunities arise, they should be shared through the same chosen communication platform as soon as possible with members. In addition, as deadlines approach it may be beneficial to remind members not to miss out.

3

Opportunity details should be made readily available in the share portal, and summaries/ highlights can be shared in the same vehicle that shares industry statistics.

Tilapia Branding

This section focuses on increasing the market demand for tilapia. There is a perception that tilapia is mostly consumed in the north and centre regions of Mozambique, however the research found that increasingly tilapia has a potential market even in the south region of the country. What appears to be a catalyst for this is the taste/quality of the fish that first time consumers' experience, in that more times, than not they turn into repeat buyers. Therefore, the hurdle is to increase the number of first time consumers, then ensure production quantities and quality are maintained.

Developing standardized communication about tilapia allows for collective messaging that creates a consistent message in consumers perception, which is proven to increase to probability of purchase.



Audience

Urban / middle income population



Approach

1

Develop a visually attractive “fact sheet/narrative” of the health and lifestyle benefits of introducing tilapia into their regular diet.

2

Members have to collectively agree to the desired messaging, and to introduce it into their sales and marketing for tilapia.

A

Focusing on the lifestyle approach, an innovative and potentially cost-effective approach to massifying this messaging is to engage a social media influencer to promote the brand. Their reach should drive the selection of the influencer, targeting one whose audience is primarily within the desired demographic (mid-income population). The influencer's⁷ brand would ideally be associated with food/gastronomy or healthy eating.

The concept would be for the influencer to illustrate simple but aesthetically appealing recipes using tilapia, speak to the benefits of the product, and mention producers or retail spaces where consumer can purchase.

- Key metrics for selection.
- An additional benefit of using social media is that their reach often goes beyond the target audience, which can increase across the board awareness of aquaculture tilapia.

B

An alternative more traditional approach is to approach retailers and collaborate on activation events, where consumers can experience consumption of the product (encouraging potential purchase)⁸.

- Key metrics for selection.
- Showcase "easy but fancy preparations".

⁷ Who should be contractually required to have Facebook visibility to maximize impact.

⁸ On a rotational basis, different farmers would have the opportunity to highlight their product.

C

Furthermore, incentivizing a direct-to-consumer approach may also be beneficial, given that, a significant amount of tilapia purchase tends to be towards untapped markets. Cognizant that most tilapia is transported to its larger commercial centres, there is a potential to retail the fish en route. Introducing the concept of the “Camião do Peixe”:

- i. Farmers gathered production (TBD) that could be sold with discount prices (e.g. 10% off sale).
- ii. Define and decide where and when this sale event could take place.
- iii. Combine this with advertisement of simple recipes.
- iv. The advertisements can be done on flyers that inform of the date, time and place where the “camião do peixe” will be in your town, and on the reverse have a recipe for tilapia. In the long term AMAQUA may even consider establishing a form of loyalty program, where by repeat buyers can receive better discounts after an established number/quantity of purchases.



Audience

Rural / low-income population



Approach

1

Develop a visually attractive “fact sheet/narrative” of the **food security** benefits of introducing tilapia into their regular diet.

2

Members have to collectively agree to the desired messaging, and introduce it into their sales and marketing for tilapia.

- Showcase versatility and familiarity.

3

Members should also be encouraged to highlight their more affordable cuts/quantities of tilapia, reducing the effect of price sensitivity of this demographic.

Annexes



Annex 1: Sample Data Collection Form

Objective: Understanding the profile of the association member

Date:

Contact Information Name:

Phone:

E-mail:

QUESTION	ANSWER				
1. Based on your last harvest please select the category that best describes your production	Production Volume	Up to 113 kg <input type="checkbox"/>	>123 to 13,500 kg <input type="checkbox"/>	>13,500 to 67,500 kg <input type="checkbox"/>	>67,500 kg <input type="checkbox"/>
	Production System	Extensive <input type="checkbox"/>	Extensive / Semi-intensive <input type="checkbox"/>	Semi-intensive / Intensive <input type="checkbox"/>	Intensive <input type="checkbox"/>
	Final use	Family consumption <input type="checkbox"/>	Family consumption / Trade <input type="checkbox"/>	Trade <input type="checkbox"/>	Trade <input type="checkbox"/>
2. Where did you source your feed	Produced On-site (local inputs) <input type="checkbox"/>	Produced On-site (imported inputs) <input type="checkbox"/>		Imported Directly <input type="checkbox"/>	Imported through local 3rd party <input type="checkbox"/>
3. Where did you source your fingerlings/seed	Wild capture <input type="checkbox"/>	Local Supplier <input type="checkbox"/>	Local Research Centre <input type="checkbox"/>	Grown On-site <input type="checkbox"/>	Imported <input type="checkbox"/>
4. Are you using	Ponds <input type="checkbox"/>		Cages <input type="checkbox"/>		
5. When did you start your growth cycle					
6. When did you harvest your production					
7. By size, can you approximate how much was harvested?	Size	Harvest (kg)		Gate Price /kg (MZN)	
	< 200g				
	> 200g – 400g				
	> 400g – 600g				
8. Have you exported in the last 3 years	Yes <input type="checkbox"/>		No <input type="checkbox"/>		
9. If not, please list main reasons why not?					
10. Of your harvest turnover how much is domestic vs. international	Percentage	Where do you primarily sell (Province, Country)			
	Domestic				
	International				
11. How is your harvest processed	Type	Percentage			
	Fresh				
	Frozen				
	Dried salted				
	Fillets				
	Whole fish				
	Gutted				
Un-gutted					
12. Who is the main target market	Type	Percentage			
	Direct to consumer				
	Wholesalers				
	Retailers				
	Supermarket chains				
	Local markets (mercados)				
B2B (business to business)					
13. During your harvest where did you receive an official inspection	Who	When			

Annex 2: Strategic Planning Guide

Figure 2: Association Planning Model



Source: Microfinance Association Planning Guide, the SEEP Network, 2011.

Sample Strategic Planning Agenda

TIME	OBJECTIVE
9:00-9:15	Welcome intro - Overview of the day
9:15-10:00	<p>How did we get here?</p> <ul style="list-style-type: none"> o What do we do well? Where can we improve? What would we like to see? o Review of situational analysis – the Key Findings & Insights can provide industry, and members needs assessment, however, an organizational capacity assessment would still be required. o Review of Mission and Vision
10:00-10:45	<p>Where are we going?</p> <p>Discussion: 3-year Vision & Mission: The vision of the association describes what the organization will be in the future.</p> <ul style="list-style-type: none"> o A vision is not a statement of “who you are” or “what you do,” but is a common idea of what the association will become. The vision begins to define the direction of the association. o The organizational mission, on the other hand, is a concise statement defining the overall purpose and scope of responsibility. It explains the reason the association exists. o Finally, the organization’s values are commonly held beliefs to which it commits itself. Ultimately and ideally, an association’s values should guide the behaviour of every individual within the organization.
10:45-11:30	Coffee break
11:30-12:30	<p>How are we going to get there?</p> <p>Define AMAQUA Strategic priorities, which they should include goals, strategic objectives, critical success factors, and key decisions.</p> <ul style="list-style-type: none"> o Goals are the long-term targets, such as growth, sustainability, or market leadership, that guide and characterize the association’s work. o Strategic objectives are the specific statements of what the association wants to achieve during the period of the plan. o Critical success factors are issues deemed important to the organization with respect to its present and future performance. o Key decisions are statements that outline how the association will address specific critical success factors to ensure they are resolved and do not delay implementation of the plan. Generally, each success factor will have at least one key decision associated with it, and maybe more.
12:30-1:30	Lunch
1:30-2:00	Why change?

Adapted from: One Day Strategic Planning Meeting – Sample Agenda, SME Strategy Consulting, 2016; and Microfinance Association Planning Guide, The SEEP Network, 2011.

TIME	OBJECTIVE		
2:00–2:45	Measuring success / KPI's Table 2: Sample Key Capacity Areas with Related Standards of Excellence		
	Key capacity area	Standards of excellence	Description
	GOVERNANCE	Membership	<ul style="list-style-type: none"> Association membership is representative of the market and is defined and held accountable by common standards of performance and practice.
		Democratic participation	<ul style="list-style-type: none"> The association has a participatory decision-making process supported by transparent and consensus-oriented systems.
		Board	<ul style="list-style-type: none"> The board of directors is accountable to the membership and provides effective leadership in fulfilling the association's mission.
	OPERATIONS	Planning	<ul style="list-style-type: none"> The association utilizes a comprehensive and participatory system of planning to define its priorities and organize activities in the short and long term.
		Systems	<ul style="list-style-type: none"> Systems are in place to ensure efficient flow of information, compliance, and transparency.
		Monitoring and evaluation	<ul style="list-style-type: none"> The association monitors and evaluates its performance on a regular basis and utilizes information gathered to make improvements and ensure accountability.
	FINANCIAL VIABILITY	Financial planning	<ul style="list-style-type: none"> Financial planning is an integral part of short- and long-term organizational plans, and appropriate financial performance measures are used to set goals and monitor performance.
		Financial performance	<ul style="list-style-type: none"> Financial performance measures—associated with earned income, the development of operating reserves, and operational efficiency—are strong and show positive trends.
		Financial administration	<ul style="list-style-type: none"> Financial administration processes are transparent and provide the necessary level of control to ensure that resources are used efficiently and for their intended purpose.
	HUMAN RESOURCES	Leadership	<ul style="list-style-type: none"> Association leaders consistently demonstrate success in carrying out the mission of the organization and are influential in shaping the future of the sector.
		Personnel management	<ul style="list-style-type: none"> Personnel management policies and processes are clearly documented and communicated, and adequately meet the needs of the association in its present stage of development.
		Professional development	<ul style="list-style-type: none"> The association prioritizes the professional development of its staff.
		Organizational culture	<ul style="list-style-type: none"> The association has a dynamic and open organizational culture.
	EXTERNAL RELATIONS	Contacts	<ul style="list-style-type: none"> The association successfully draws guidance and information from its close contacts with a diverse range of aquaculture industry stakeholders to achieve its organizational objectives.
		External communications	<ul style="list-style-type: none"> The association has a clear communications strategy that effectively targets a diverse range of aquaculture stakeholders.
		Credibility	<ul style="list-style-type: none"> The association is recognized as an important and capable representative of the aquaculture sector, and effectively advocates on behalf of its members.
SERVICE DELIVERY	Market responsiveness	<ul style="list-style-type: none"> The association is market oriented and responsive to changing conditions. 	
	Service mix	<ul style="list-style-type: none"> The association's core services are well designed and reflect its comparative advantage. 	
	Member focus	<ul style="list-style-type: none"> The association is driven by the needs and demands of its members. 	
2:45–3:30	What is the most important priority moving forward?		
3:30–4:15	Risk identification – What is going to Stand in our way?		
4:15–5:00	Next steps / Action Steps		

Annex 3: Geographic distribution of the tilapia value chain in Mozambique and current AMAQUA membership

REGION	PROVINCE	LOCATION	COMPANY	THE BUSINESS	THEIR CURRENT MARKET	AMAQUA CURRENT MEMBERSHIP	
						YES	NO
NORTH (1)	Niassa	Lichinga	Renovação Chikoa	Fingerlings Feed	Niassa C.Delgado		×
CENTER (10)	Tete	Cahora Bassa	Chicoa Fish Farm	Fingerlings, Farming, Processing Feed imported from ZBW	Domestic Exports	×	
	Tete	Cahora Bassa	Mozambezi	Fingerlings	Tete		×
	Zambézia		Aquapesca	Prawns	Exports	×	
	Zambézia	Nicoadala	Aquacultivos	Fingerlings	Zambezia	×	
	Zambézia	Licungo	Unilicungo	Fingerlings	Zambezia		×
	Maníca		Agromaco	Fingerlings	Manica		×
	Maníca		Chicamba-Pescas	Fingerlings, Feed	Manica		×
	Sofala	Beira	MAA	Fingerlings, Feed	Sofala		×
	Sofala	Beira	MozTai	Feed	Sofala		×
	Sofala	Beira	Sulimoz, SU	Fingerlings	Sofala		×
SOUTH (9)	Inhambane	Inharrime	Poelela Fish	Fingerlings, Feed, Farming, Fillet processing	Centro e Norte		×
	Gaza	Bilene	Tilápia do Bilene	Fingerlings, Feed, Farming	Zona sul		×
	Inhambane	Zavala	Sihaka	Farming	Zona sul		×
	Gaza	Chókwè	Papa Pesca	Fingerlings, Farming	Zona sul	×	
	Gaza	Chókwè	IAC - Incubadora de Aquacultura de Chókwè	Farming	Zona sul	×	
	Inhambane	Vilanculo	IAM, Aquacultura	Fingerlings	Vilanculo		×
	Maputo		Grupo MEREK	Feed retailer (imported from Thailand)			×
	Maputo	Matola Rio	MEADOW	Feed	Zona Sul		×
	Maputo	Tchunissa	Umbeluzi Farms	Fingerlings, Farming (feed imported from RSA)	Zona Sul		×
	?		Nuibrava			×	
	?		PAL			×	
TOTAL			22			7	15

Source: current producers along value chain (IDEPA, INIP*), Feb. 2022
Source: current membership (AMAQUA), Jan 2022

Annex 4: Business Environment: Understanding the tax regime in force

Pauta Aduaneira / Customs Tariff

O que pagamos quando importamos espécies de proteína animal e preparados utilizados na aquacultura?

Importações na óptica do consumo

NÚMERO DE POSIÇÃO	DESIGNAÇÃO DAS MERCADORIAS	CLASSE	TAXA GERAL	SADC				UE	IVA
				RSA		OUTROS M.			
				CATEG.	TAXA	CATEG.	TAXA		
2.01	Carne bovina (fresca, refrigerada, congelada)	C	20%	C1	0	C1	0		17%
2.03	Carne suína (fresca, refrigerada, congelada)	C	20%	C1	0	C1	0		17%
2.04	Carne ovina ou caprina (fresca, refrigerada, congelada)	C	20%	C2	0	C1	0		17%
2.07	Carne das aves (fresca, refrigerada, congelada)	C	20%	C3	0	C1	0		17%
3.02	Carapaus frescos	C	20%	A	0	A	0		17%
3.02	Outros peixes frescos	C	20%	B1	0	B1	0		17%
3.03	Carapaus congelados	M	0%	A	0	A	0		0%
3.03	Outros peixes congelados	C	20%	B1	0	B1	0		17%
23.09	Preparações utilizadas na aquacultura	C	0%	B1	0	B1	0		17%
23.xx	Preparações utilizadas na pecuária, avicultura	Várias	7,5%		0		0		17%

Source: <http://www.at.gov.mz/por/Pauta-Aduaneira>

Annex 5: List of Terms of Reference (TORs) and Memorandum of Understanding (MOUs) to be developed

- TOR for Executive Secretariat, ES
- TOR for Stakeholders Focus Group, SFG
- TOR for Fiscal/Legal adviser (tax regime & preferential rates, arguments for lobbying)
- TOR for Fish Quality Control expert (biosecurity issues incl. training manuals)
- MOU for partnership with Academia (high-level needs assessment, survey, database, studies, but not limited to)
- MOU for partnership with INIP (outsourcing biosecurity)
- TOR for IT expert (development of AMAQUA website)

Strengthening the Institutional Capacity of AMAQUA

To better represent the aquaculture industry in Mozambique

| Consultant |



| Beneficiary |



| Implementers |



TOOLKITS

September 2022