



EVALUATION & IMPACT ASSESSMENT OF THE CENTRAL SECTOR SCHEME OF MARINE PRODUCTS EXPORT DEVELOPMENT AUTHORITY

Report

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CENTRAL SECTOR SCHEME OF MARINE PRODUCTS
EXPORT DEVELOPMENT AUTHORITY**

for SFC 2017-2020

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List of Abbreviations

EU	European Union
BMP	Better Management Practices
CIFT	Central Institute of Fisheries Technology
DGFT	Director General of Foreign Trade
EIC	Export Inspection Council
GVA	Gross Value Added
HACCP	Hazard Analysis and Critical Control Point
MPEDA	Marine Products Export Development Authority
NaCSA	National Centre for Sustainable Aquaculture
NETFISH	Network for Fish Quality Management and Sustainable Fishing
NIPHATT	National Institute for Fisheries Pre-Harvest Testing and Training
OECD-DAC	Organization for Economic Cooperation and Development - Development Assistance Committee
REESI	Relevance, Efficiency, Effectiveness, Sustainability and Impact
RGCA	Rajiv Gandhi Centre for Aquaculture
SEAI	Seafood Exporters Association of India

Disclaimer

This report is prepared based on data provided to us. While due care has been taken during the compilation of this report to ensure that the information is accurate to the best of Athena Infonomics and MPEDA knowledge and belief, the content is not to be construed in any manner whatsoever as a substitute for independent advice and decision. Athena Infonomics and MPEDA neither recommend nor endorse any specific products or services that may have been mentioned in this report and nor do they assume any liability or responsibility for the outcome of decisions taken as a result of any reliance placed in this report. Neither Athena Infonomics nor MPEDA shall be liable for any direct or indirect damages that may arise due to any act or omission on the part of the user due to any reliance placed or guidance taken from any portion of this report.

A person is standing on a sandy beach at dusk, wearing a light-colored shirt and shorts. They are holding a net or bag. The scene is framed by a large, glowing blue circle. There are also several other circles of varying sizes and colors (light blue, white, and yellow) scattered around the main circle. The background is a dark blue sky and a calm sea.

CHAPTER 1
**EXECUTIVE
SUMMARY**

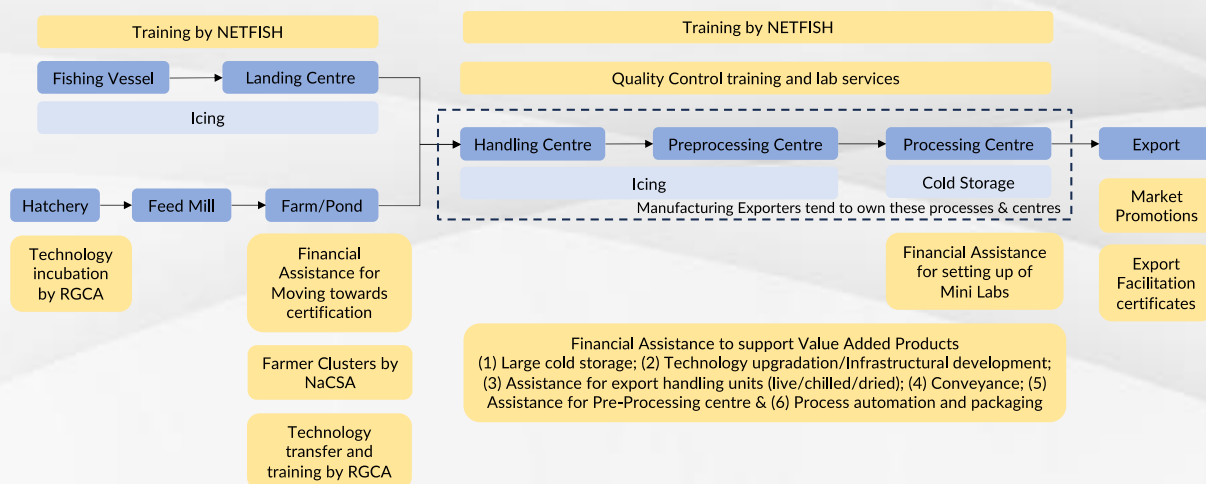
1 Executive Summary

The Marine Products Export Development Authority (MPEDA) was set up by an act of Parliament during 1972. The erstwhile Marine Products Export Promotion Council established by the Government of India in September 1961 was converged in to MPEDA on 24th August 1972. MPEDA is given the mandate to promote the marine products industry with special reference to exports from the country. It is envisaged that this organization would take all actions to develop and augment the resources required for promoting the exports of “all varieties of fishery products known commercially as shrimp, prawn, lobster, crab, fish, shell-fish, other aquatic animals or plants or part thereof and any other products which the authority may, by notification in the Gazette of India, declare to be marine products for the purposes of (the) Act”. The Act empowers MPEDA to regulate exports of marine products and take all measures required for ensuring sustained, quality seafood exports from the country. MPEDA is given the authority to prescribe for itself any matters which the future might require for protecting and augmenting the seafood exports from the country. It is also empowered to carry out inspection of marine products, its raw material, fixing standards, specifications, and training as well as take all necessary steps for marketing the seafood overseas.

MPEDA mandated Athena Infonomics to undertake an evaluation and impact assessment of the Central Sector Scheme of MPEDA for the SFC period 2017-2020. The objective of study is to highlight the impact made by MPEDA through its central sector scheme and various training programs and support services such as QC and ELISA laboratories, and export facilitation certificates for the Exporters and Aquaculture farmers. To assess MPEDA Central Sector Scheme, a comprehensive approach utilizing the Organisation for Economic Co-operation and Development (OECD) REESI Framework (Relevance, Efficiency, Effectiveness, Sustainability, and Impact) was employed. The study involved mixed methods, gathering feedback from key stakeholders in the marine export ecosystem. To assess the user-friendliness of their e-mpeda portal, Heuristic Evaluation framework was used. Various dimensions of user-friendliness including Visibility, Flexibility, Consistency, Freedom, Mapping, Error Prevention, Error Recovery, Recognition, Minimalism, and Help.

MPEDA organises various activities and initiatives along the value chain of the fisheries and aquaculture industry. Under the central sector scheme for the SFC 2017-20 period, MPEDA implemented schemes related to promotion of value addition products, moving towards certification for primary production, establishment of minilabs for exporters, training of farmers and promotion of latest technology for species diversification. The various components of this central sector scheme have been aligned along the value chain as described below.

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA



The specific details of the scheme and its impact are outlined below:

Value Addition:

India's share in global trade of value-added products export is only 2.5% i.e., USD 0.86 million. India's competitors in global seafood trade, China, Vietnam, Thailand etc. are forerunners in the trade of value-added marine products¹. Special emphasis has been given for the promotion of export of value-added products as there is an increasing global demand for value added products in convenient form. The Scheme is aimed to bring in more investment in high end Value Addition and also on establishment of appropriate facilities to export live, chilled, and dried marine products having high unit value.

Financial assistance was offered to exporters to procure large cold storage and machineries for process automation and packaging, upgrade technology, and develop infrastructure to export value-added products. For the evaluation period 2017-20, there were 156 beneficiaries spread across the nine coastal states. Beneficiaries found the assistance very helpful and that it was crucial to pace up the volume of exports for their organisation. 83% of the respondents found the scheme 'excellent'.

Market Promotion:

As part of market promotion activities, MPEDA has undertaken significant endeavours to participate in the international seafood fairs and buyer-sellers meet etc. MPEDA also offers their inputs on issues affecting market access of Indian marine products like Trade policy, Sanitary and Phytosanitary measures, or Technical Barriers to Trade, and Antidumping Duty. During the 2017-2020 period, MPEDA facilitated 14 international fairs with 150 co-exhibitors.

¹ MPEDA

The beneficiaries who are newly established and small-scale exporters found the international fairs to be beneficial in access new buyers as they got a chance to display their products and engage with buyers directly. The large and experienced exporters found these fairs useful for networking. They preferred Buyer-Seller Meets over International fairs to engage with buyers more effectively.

Export traceability and sustainability:

The financial assistance for moving towards sustainability and certification is aimed to help acquire certification standards and infrastructure/equipment for the production of quality seafood from aquaculture Farms/Hatchery/Feed mills/ornamental fish breeding units/ rearing farms/ export holding facilities. For the SFC 2017-2020 period, total of 90 beneficiaries were benefited through this scheme.

Market-related challenges highlighted by the respondents include lower market price for their crop, increasing input costs (feed and electricity) and lack of regulation on feed mills. However, they found the scheme very helpful and the MPEDA officials very supportive and engaging.

MPEDA enables traceability through its export facilitation certificates. For the sea caught species, Catch certificate is issued and the type of certificate is categorised based on the export market such as EU or Non-EU. With regard to shrimp exports to the USA, DS-2031 certificate is issued to declare that the shrimps were caught in a manner not harmful to the turtles or were harvested from aquaculture. ICCAT is a specialised certificate for Tuna species. All respondents found it easy to apply for export facilitation certificates. They got the certificate within 24 hours. They found the MPEDA officials to be supportive.

Technology Incubation in Aquaculture:

The technology developed by Rajiv Gandhi Centre for Aquaculture (RGCA) is in commercial mode and the deliverable will be extended to the needy farmers & entrepreneurs in India. RGCA is seen as Aquaculture Technology Incubation Centre of MPEDA. The species promoted include seabass, mudcrab, GIFT, and artemia. Beneficiaries of the demonstration programs found it useful to understand the scope and market for these species.

Quality Assurance:

To meet the food safety and quality standards and ensure consumer protection, stringent hygiene measures have been adopted at the national, regional, and international levels, based on the Codex Code of Practice for Fish and Fishery Products (Codex Alimentarius Commission, 2016) and its guidance to countries on practical

aspects of implementing good hygiene practices and the Hazard Analysis Critical Control Point (HACCP) food safety management system.

The financial assistance to set up Mini Labs allows for establishment of laboratory for microbial and chemical parameters of fishery products intended for export purpose in approved processing plant/ handling center testing of fishery products. The main objective of the scheme is to enable in-house testing of the export consignments at the processing plant level. 60% of the respondents reported to have better control over quality and realised significant cost saving on account of this scheme. All the respondents reported that the assistance for mini labs was useful.




To monitor the control over the residues of unauthorized substances and environmental contaminants in fish & fishery products, MPEDA has established five Quality Control (QC) Laboratories and ELISA Screening laboratories to support the farming community in ensuring the quality and traceability of the shrimp crops they have produced for export supply. MPEDA operates 14 ELISA labs across India. An average of 11,000 samples were tested annually during 2017-2020. QC labs tested a total of 25,591 samples during the same period. Respondents who availed MPEDA lab services found the services to be reliable and the persons at lab to be responsive and prompt in informing the test results.


Training and Skill Development:

Between 2017 and 2020, various training and skill development programs were organised by the Aquaculture division of MPEDA in which about 30,292 beneficiaries participated. While all the respondents found the training useful and relevant, follow-up with them regarding the adoption of practices remains a challenge. It would be effective to have a targeted approach to different training programs to then move to a scalable model.

Impact and Recommendations

In conclusion, the study highlights MPEDA's instrumental role in expanding India's marine exports ecosystem through well-structured policies, infrastructure expansion, robust institutional building, ecosystem creation, innovative approaches, and remarkable impact at the beneficiary level. The achievements outlined in this study advocate for continued support and recognition of MPEDA's efforts, and the recommendations further strengthen its strategic direction, program efficiency, and overall positive impact on marine products development in India. The key impact of the schemes is outlined below:

REESI Dimensions	Impact Findings
 Relevance	<ul style="list-style-type: none"> • Financial Assistance Schemes were aligned with the beneficiary needs, market demands and global value chain of fisheries and aquaculture. • 100% of respondents have reported that the scheme was crucial for development in marine products exports.
 Efficiency	<ul style="list-style-type: none"> • The e-mpeda portal has a score of 60% on user-friendliness assessed based on heuristic evaluation which leads to sub-optimal performance and lower adoption of online system for application processing. • Only 30-35% respondents found the online application (for financial assistance) easy to use. • About 50% of the respondents found the assistance amount adequate while remaining expect a higher subsidy amount. • 100% of respondents found that participation as co-exhibitors offered improved engagement with the international market. 40% were able to access new buyers. • 100% of respondents found the MPEDA officials supportive and responsive.
 Effectiveness	<ul style="list-style-type: none"> • Respondents of financial assistance scheme have reported an increase in productivity and turnover. Monitoring beyond the obligation period to capture the long-term impact is not available. • 100% of respondents have reported that online portal provided a faster turnaround (less than one day) for export facilitation certificates. • 20% of beneficiaries reported an increase in exports after attending international fairs • 100% of beneficiaries found prospective buyers while participating in the international fairs • Less than 10% of the respondents utilised MPEDA lab services on need basis. Beneficiaries found the MPEDA lab testing services reliable and timely. • Adoption of value-added products or processes after MPEDA training was low due to multiple factors like high cost of investment in production line & lack of adequate

REESI Dimensions	Impact Findings
	<p>support in transferring learning of training into production line.</p> <ul style="list-style-type: none"> • 100% of respondents found mini lab set up with MPEDA's financial assistance useful. • Respondents reported a limited price realization as envisaged as part of cluster formations by NaCSA. • 100% of the respondents found the training material and quality of trainers adequate and relevant. • Online portal is transactional and does not allow for continuous engagement of beneficiaries.
 <p>Sustainability</p>	<ul style="list-style-type: none"> • Respondents of financial assistance scheme for value-added products and mini labs continue to use the infrastructure for furthering exports. • Training programs helped create awareness, but the rate of adoption is slow due to cost-benefit reasons. • Portal for availing export facilitation certificates was reported to be useful and user-friendly leading to higher adoption rate. • Farming clusters were unable to leverage the complete benefits due to low bargaining power. • Technical documentation for all modules of e-mpeda portal not available. Change requests and updates done over email does not allow monitoring and learning of the portal utilisation. • Awareness about the schemes and services of MPEDA is person-driven and nature of benefit realised. • Limited brand building of MPEDA

The suggested recommendations build on stakeholders' feedback and structure around broad dimensions for the Marine Products Export Development Authority (MPEDA) to enhance its impact and effectiveness. The recommendations have been structured on three levels – Strategic, System and Process level and Scheme-level.

Establish a Technical Project Management Office (TPMO): MPEDA should transform from the role of administrator of financial benefits to a techno-commercial agency for better engagement with stakeholders. TPMO would work on mission mode and be cross-functional with clearly defined outcomes aligned to organizational goals and functional goals.

Establish a Marine Sector Skill Council: As per Handbook of Fisheries Statistics 2022, fisheries and aquaculture sector supports about 2.8 crore fishers – 2.3 inland; 49 lakh marine. There are 1,515 registered exporters with MPEDA, 613 processing centres; 271 handling centres; 787 storage facilities (as per MPEDA Annual Report 2019-20) in Marine export industry required varying degrees of skill requirement. This will help address the need for a formal institutional structure to focus on skill development of the entire skill pyramid of the marine industry. To enable industrywide skill development, MPEDA to establish a Marine Sector Skill Council (MSSC) in consultation with MSDE. This will help in standardisation of skilling across the value chain, build world class skilling program, incubate futuristic skilling model, attract investment, and generate employment opportunities.

MPEDA to be designated as Unified Authority for Export Certification – To reduce lead time and improve ease of doing business in issuing of Sanitary Import Permit, Specific Pathogen Free Certificate, NOC from Customs & DGFT for Advance authorisation, the Ministry of Commerce and Industry may consider nominating MPEDA as an authorized agency for single window clearance for import of raw material for reprocessing and export of value-added seafood products, and may be delegated power as a single agency for collection of sample and testing for clearance marine product consignments for import of raw material for reprocessing and export. Though MPEDA was formed in 1972, the powers to certify fish & fishery products for export is still vested with EIC, which deals with multiple commodities. Assigning fish and fishery product certification for exports to MPEDA will help the industry and significantly improve the ease of doing business by offering a single window service to the stakeholders and facilitating import of raw material for reprocessing will increase India's share in global value addition.

Delegation of authority to evaluate proposals: To reduce the duplication of efforts for evaluation of proposals at the Head office and field offices, MPEDA to review the current delegation of power for various levels. This will allow for quick decision-making in evaluation of proposals. Further, the e-mpeda portal needs to be redesigned to accommodate for these changes for faster processing of applications and proposals online itself.

Demand driven budgetary support to various initiatives: MPEDA to devise a demand driven budgetary support system to capture various opportunities in the marine value chain. To enable significant impact of the system post disbursement, MPEDA may consider institutionalising agile/adaptive planning cycle based on the nature of the scheme, lead-time required to create an impact, number of beneficiaries to be targeted, and economic size required to create an impact. Also, a strategic roadmap needs to be created to facilitate/migrate beneficiaries who applied for the schemes but haven't received the assistance to transition smoothly into another scheme if available or engage continuously to support them technically.

Proactive Market Promotion and Engagement: To keep up with the competition in the international markets, MPEDA enables participation of exporters in the International Seafood Fairs each year and organizes buyer-seller meets to help exporters expand their market and buyers. In addition, small exporters (export value less than USD 20 million) receive financial assistance from MPEDA to participate in these fairs as co-exhibitors. To augment this initiative, MPEDA may consider segmenting beneficiary based on their needs and undertake segment specific market promotion activities such as buyer – seller meet in destination markets (virtual and in-person), reverse buyer-seller meets in India for experienced marine exporters, enhanced fair participation for new exporters, and diversification of international fair participation to new emerging markets and deepening in existing markets by participating in regional food fairs.

Adoption of digital and artificial intelligence-based solutions: With the reduced human resources as a reality, it becomes imperative to adopt intelligent digital solutions such as chatbot, decision-support system, blockchain and such tools to share information and communications regarding various initiatives of MPEDA. Redesign the MPEDA website and e-mpeda portal according to GIGW guideline to improve user experience of various stakeholders.

Transformation of societies as FPOs: The National Centre for Sustainable Aquaculture (NaCSA) can help the aquaculture farmer societies form as Farmer Producer Organisations (FPOs) to help access institutional finance and insurance and get better market access and price for their crops. This is critical as 90% of the Indian shrimp farmers belong to small-scale or marginal category with operational holdings of less than two hectare per individual. Further, tying up with Credit Guarantee Trust Fund for Micro and Small Enterprises (CGTMSE) for farmers would help avail collateral-free loans.

Augmenting human resources requirement in technical roles: The total sanctioned strength of MPEDA has been revised from 420 to 250 combining the Head Office and Field Offices. Out of this, the present resource in position is only 181 including 11 officials on deputation. The existing staff is not be adequate to meet the growth objective of the sector. In this context, it is important to recalibrate human resources requirement in line with the sector requirements and build their capacity to take up cross-functional roles while having a holistic view of the export ecosystem.

Other recommendations include providing local language support in both online and physical application forms, leveraging the collective experience of MPEDA, a fee-based research service and market intelligence support can be offered to exporters, investors, etc. and focus on building quality branding and logo.

These recommendations highlight the potential areas where MPEDA can further enhance its operations and its impact on marine export development.



CHAPTER 2
INTRODUCTION

2 Introduction

2.1 Marine Products Industry

The importance of utilizing fisheries and aquaculture resources responsibly is widely recognized and prioritized after the adoption of the Code of Conduct for Responsible Fisheries (the Code; FAO, 1995). This is also aligned with the United Nations Sustainable Development Goals (UN-SDGs), particularly Goal 14, to conserve and sustainably use the oceans, seas, and marine resources.

Global fish and aquaculture production is estimated to reach over 200 million tonnes by 2030. It is estimated to have reached about 179 million tonnes in 2018 with a total first sale value estimated at USD 401 billion, of which 82 million tonnes, valued at USD 250 billion, came from aquaculture production. Aquaculture² accounted for 46% of the total production and 52% of fish for human consumption. Top producers include China, India, Vietnam, and Bangladesh. In 2018, an estimated 59.51 million people were engaged in the primary sector of fisheries and aquaculture, 14% of them women. In total, about 20.53 million people were employed in aquaculture and 38.98 million in fisheries³.

The FAO global marine capture database includes catches for more than 1,700 species (including “not elsewhere included” categories), of which finfish represent about 85% of total marine capture production. Tunas, cephalopods, shrimps, and lobsters are the four most valuable groups.

2.1.1 Production

The production in temperate areas continue to remain stable at between 37.5 million tonnes and 39.6 million tonnes per year. In tropical areas, an increasing trend in catches have been observed in the Pacific Ocean and Indian Ocean. In the Indian Ocean, catches have been increasing steadily, particularly in the Eastern Indian Ocean, with catches of small pelagics, large pelagics (tunas and billfish), and shrimps driving most of the increase. In the Western Central Pacific, tuna and tuna-like species accounted for most of the increase in catches while other main species, it continues to remain stable.

Global production in inland waters have increased steadily year on year, reaching over 12 million tonnes in 2018. The share of inland waters in the total for global captures also increased from 8% in the late 1990s to 12.5% in 2018. Four major species groups

² Aquaculture includes aquatic animals, aquatic algae and ornamental seashells and pearls.

³ State of World Fisheries and Aquaculture Report 2020, FAO

account for about 85% of total inland water catches which includes carps and tilapias. China is the largest producer followed by India, Bangladesh, Myanmar, and Cambodia.

Indian marine fisheries potential is estimated at 5.31 million tons as against present production of 4.17 million tons during 2018-19 (harnessing nearly 78% of the estimated potential). The estimate of potential yield of conventional resources along the mainland & Island ecosystems of India is 5.31 million tonnes and non-conventional resources is 1.847 million tonnes; thus, totalling to 7.158 million tonnes⁴.

Table 1: Potential of Fisheries Resources in the Indian Exclusive Economic Zone (EEZ)

A. Conventional resource	Quantity in million tonnes
Demersal resources (mainland)	2.30
Pelagic resources (mainland)	2.63
Lakshadweep (excluding oceanic resources)	0.01
Andaman & Nicobar (excluding oceanic resources)	0.04
Oceanic (for entire EEZ)	0.23
Others	0.09
Sub Total	5.31
B. Non-Conventional resources: (Additional Potential)	
Deep sea Myctophids	1.00
Oceanic Squids	0.63
Jelly fish	0.20
Marine Macro Algae	0.02
Sub Total	1.85
Resources Grand Total:	7.16

Source: Fishery Survey of India (Report of the working group for revalidating the potential yield of Fishery Resources in the Indian EEZ), 2018

2.1.2 Consumption pattern of fish

Human consumption of fish has increased from 71.8 million tonnes (1965) to 156.4 million tonnes (2018) and per capita consumption has increased from 13.4 kg to 20.5 kg. In 2018, about 88% of the 179 million tonnes of total fish production was utilized for direct human consumption, while the remaining 12% (or about 22 million tonnes) was used for non-food purposes. There are four methods of utilization for human consumption – live, fresh, or chilled, frozen, preserved, or prepared and cured.

In 2018, live, fresh, or chilled fish still represented the largest share of fish utilized for direct human consumption (44%) and was often the most preferred and highly priced form of fish. It was followed by frozen (35%), prepared and preserved fish (11%) and

⁴ Handbook of Fisheries Statistics 2022, Government of India

cured¹⁰ (10%). Freezing represents the main method of preserving fish for food, accounting for 62% of all processed fish for human consumption (i.e., excluding live, fresh, or chilled fish)⁵.

The share of fish utilized for reduction into fishmeal and fish oil is highest in Latin America, followed by Asia and Europe. About two-thirds of the fish production used for human consumption is used in frozen and prepared and preserved forms in Europe and North America. In Asia, a large amount of production is sold live or fresh to consumers. The proportion of global fish consumption by Japan, USA and Europe has declined to 17% (2018) from 47% (1967) while the share of Asia increased from 48% (1961) to 17%.

2.1.3 Global Value Chain of marine products

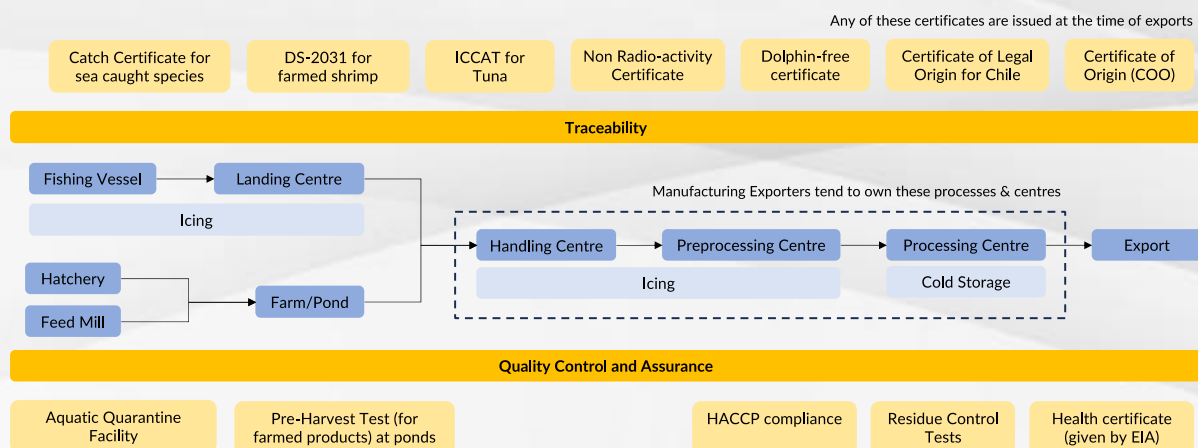
Fisheries and Aquaculture contributes to the value-added in the final demand of other industries.

Figure 1: Representation of Global Value Chain for fisheries and aquaculture



⁵ Handbook of Fisheries Statistics 2022, Government of India

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA



Source: Athena analysis

Note: The value chain is highly interactive and is not always linear in operation.

As fish is a highly perishable food, particular care is required at harvesting and all along the supply chain in order to preserve fish quality and nutritional attributes, and to avoid contamination, loss and waste. In recent decades, the fish sector has become more complex and dynamic, with developments driven by high demand from the retail industry, species diversification, outsourcing of processing, and stronger supply linkages between producers, processors, and retailers. Expansion of supermarket chains and large retailers worldwide has increased their role as key players in influencing market access requirements and standards.

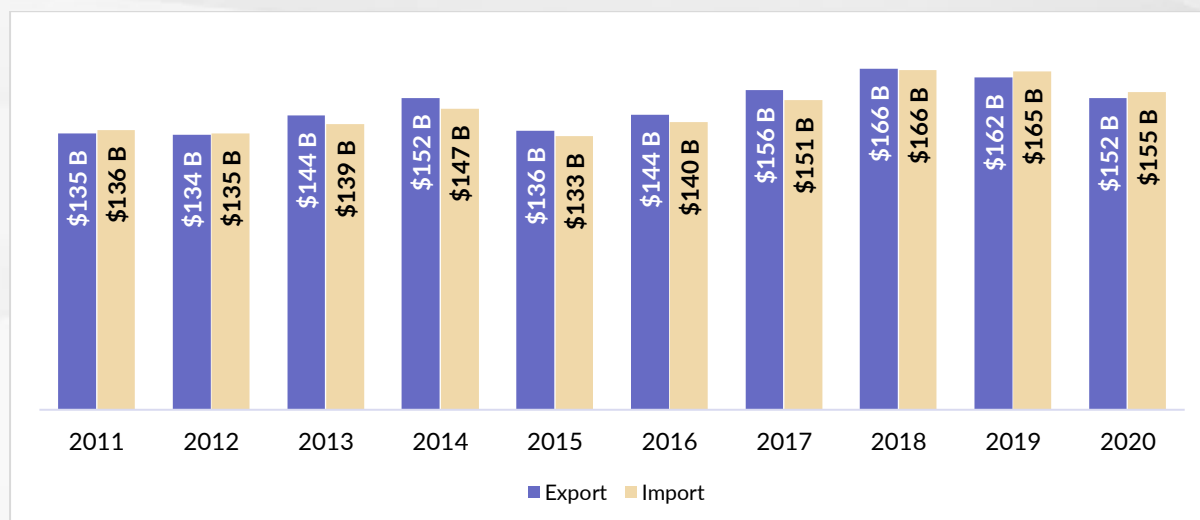
Major improvements in processing as well as in refrigeration, ice-making and transportation have enabled distribution of fish over long distances, across borders and in a greater variety of product forms. In more developed economies, fish processing has diversified particularly into high-value-added products, such as ready-to-eat meals apart from frozen fish.

2.1.4 Trade flow

Fish and fishery products remain some of the most traded food commodities in the world. It has increased from 34.9 million tonnes in 1980s to 67.1 million tonnes in 2018. In value, it has increased from USD 67 billion to USD 164.1 billion for the same period. The share of exports in total production increased from 34.3% to 37.6%. This constitutes almost 11% of the export value of agricultural products (excluding forest products) and about 1% of the value of total merchandise trade. Figure 2 shows that in most part of the last decade, the world has been a net exporter except during 2019 and 2020.

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

Figure 2: Export-Import of Fisheries and Aquaculture (2011-20) by value (in USD billions)



Source: UN Comtrade; HS Codes as per FAO

Overall, from 1976 to 2020, the value of global fish exports increased from USD 7.8 billion to peak at USD 152 billion and a peak in 2018 at USD 166 billion. Exports of fish and fish products represent about 11% of the export value of agricultural products (excluding forest products). Major importing nations include USA, China, Japan, Korea, and European Union (EU).

Table 2: Comparison between top exporting nations in fisheries (2010-20); B-billion

Exporting Nations	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
China	\$18 B	\$19 B	\$20 B	\$22 B	\$20 B	\$21 B	\$21 B	\$22 B	\$21 B	\$19 B
Norway	\$9 B	\$9 B	\$10 B	\$11 B	\$9 B	\$11 B	\$11 B	\$12 B	\$12 B	\$11 B
Viet Nam	\$6 B	\$6 B	\$7 B	\$8 B	\$7 B	\$7 B	\$9 B	\$9 B	\$9 B	\$9 B
India	\$3 B	\$3 B	\$5 B	\$6 B	\$5 B	\$6 B	\$7 B	\$7 B	\$7 B	\$6 B
Chile	\$5 B	\$4 B	\$5 B	\$6 B	\$5 B	\$5 B	\$6 B	\$7 B	\$7 B	\$6 B
USA	\$7 B	\$6 B	\$7 B	\$7 B	\$7 B	\$7 B	\$7 B	\$7 B	\$7 B	\$6 B
Thailand	\$8 B	\$8 B	\$7 B	\$7 B	\$6 B	\$6 B	\$6 B	\$6 B	\$6 B	\$6 B
Total	\$135 B	\$134 B	\$144 B	\$152 B	\$136 B	\$144 B	\$156 B	\$166 B	\$162 B	\$152 B

Source: UN Comtrade; HS Codes as per FAO

The expansion of supply chain has been propelled by increased trade liberalization and facilitated by advances in food processing and transportation technologies. For instance, Africa is a net importer in volume terms but a net exporter in terms of value, reflecting the higher unit value of exports, which are destined primarily for developed country markets, particularly Europe.

However, the average value (in 2018) of imports of fish and fish products by developing countries was USD 1.6 per kilogram (live weight equivalent), while the corresponding

figure for developed countries was USD 3.4 per kilogram. An important factor driving down the unit value of developing country imports is the extent of processing and re-export activities in these regions. Hence, there is a lot of interregional trade flows which are not sufficiently captured in the present official statistics.

India is a net exporter of fisheries and aquaculture products. It has recorded an average growth of 8% in exports in the last decade (2011-20). While the value of import is much lower than export, there has been an increasing trend in imports since 2017. During 2017 and 2020, exports show a declining trend. However, in 2021 and 2022, it has recovered and surpassed the pre-pandemic levels.

Table 3: Indian Export and Import by Value (in USD million) in 2011-22

Year	Export	Import
2011	\$3,391.7	\$127.0
2012	\$3,430.4	\$86.6
2013	\$4,874.3	\$61.1
2014	\$5,638.7	\$75.7
2015	\$4,896.3	\$92.5
2016	\$5,560.3	\$105.4
2017	\$7,188.9	\$100.9
2018	\$6,944.7	\$144.6
2019	\$6,865.5	\$167.9
2020	\$5,829.9	\$212.5
2021	\$7,561.4	\$215.2
2022	\$7,979.8	\$253.3

Source: UN Comtrade, HS Codes as per FAO

Of the 83 ports that enable export of marine products, 12 ports handle nearly 99% of the volume in the last five years (2016-20). In other words, 7% of the ports handle nearly 80% of the export volume.

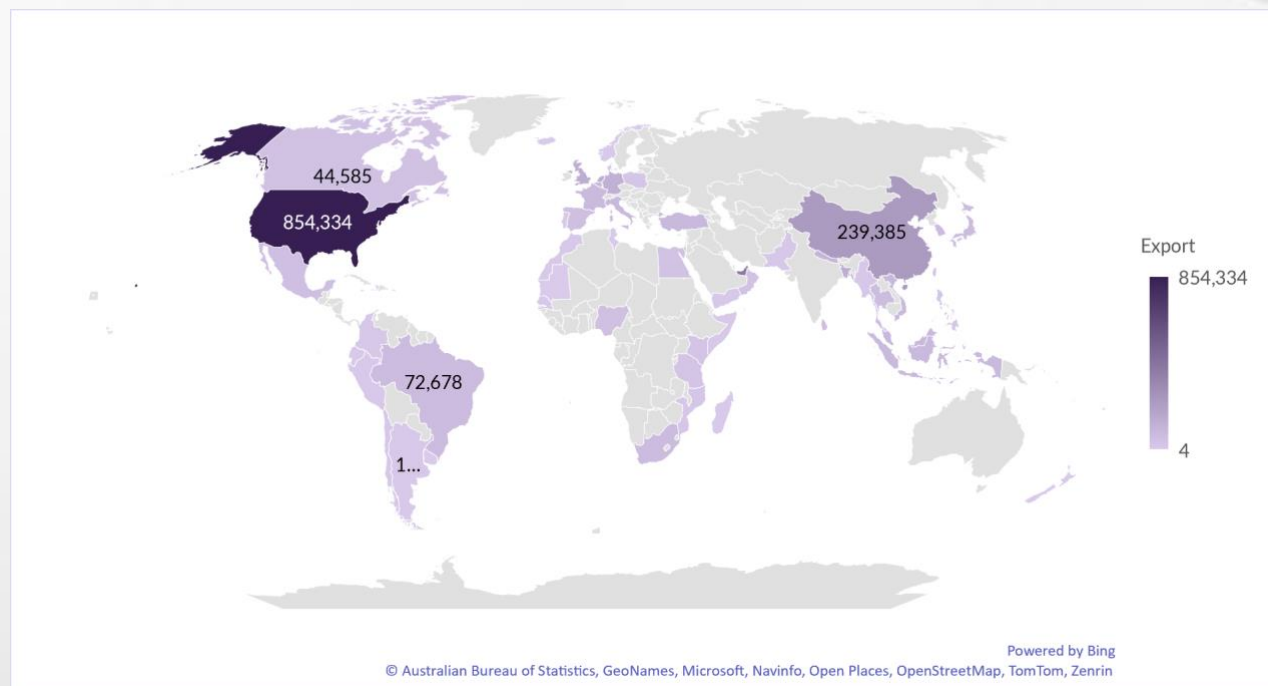
Table 4: Volume of marine products exports handled by Indian ports (2016-20) in MT.

S. No.	Ports	2016-17	2017-18	2018-19	2019-20	2020-21
1	Pipavav	2,32,391	3,06,181	2,93,835	2,57,402	1,85,817
2	Vishakhapatnam	1,59,973	2,00,779	2,21,374	2,41,783	2,16,457
3	Kochi	1,55,989	1,76,090	1,80,457	1,46,038	1,43,552
4	J N P	1,49,914	1,77,752	1,58,213	1,34,766	1,04,605
5	Mangalore/ICD	1,26,405	1,44,235	1,41,980	95,757	1,05,278
6	Kolkata	1,04,691	98,861	1,16,167	1,28,150	1,16,419
7	Krishnapatnam	62,049	86,420	86,248	97,708	64,230
8	Chennai	37,305	48,442	55,296	51,539	68,973
9	Tuticorin	42,026	51,684	55,251	57,159	47,299

S. No.	Ports	2016-17	2017-18	2018-19	2019-20	2020-21
10	Goa	43,199	50,571	37,938	14,699	8,241
11	Ennore	8,212	14,198	18,205	26,174	31,421
12	Mundra	3,918	5,476	8,889	19,431	39,243
	Total Quantity (83 ports)	11,34,948	13,77,244	13,92,559	12,89,651	11,49,510

Source: Data received from Statistics Section, MPEDA on 14 Aug 2023

Figure 3: Export regions for Indian marine products (2022) - Value in USD



Source: Ministry of Commerce and Industry Dashboard

Link: <https://dashboard.commerce.gov.in/commercedashboard.aspx>

2.2 Export Preparedness

NITI Aayog’s Export Preparedness Index (EPI) assesses the performance of the States and UTs across **four pillars** – **Policy, Business Ecosystem, Export Ecosystem, and Export Performance**. Each pillar is composed of sub-pillars, which in turn capture a state’s performance using relevant indicators⁶.

- **Policy Pillar** evaluates states and UTs’ performance based on its adoption of export-related policy ecosystem at a state and district level as well as the institutional framework surrounding the ecosystem.

⁶ *Export Preparedness Index (EPI) Report, 2022*. (n.d.). <https://pib.gov.in/PressReleaseIframePage.aspx?PRID=1939423>

- **Business Ecosystem** assesses the prevailing business environment in a state/UT, along with the extent of business-supportive infrastructure, and a state/UTs' transport connectivity.
- **Export Ecosystem** focuses on the export-related infrastructure in a state/UT along with the trade support provided to the exporters, and the prevalence of Research and Development in the state/UT to foster innovation.
- **Export Performance** is an output-based indicator which gauges the growth of a state's export over the previous year and analyses its export concentration and footprint on the global markets.

Figure 4: Export Preparedness Index - Overall performance of coastal states of India (2022)



Source: Export Preparedness Index Report 2022, NITI Aayog

The coastal states of India serve as a hub for international trade for India. According to the NITI Aayog's Export Preparedness Index, all coastal states except Kerala have performed better than the national average. Indian fisheries and aquaculture thrive in the Indian coastal states. Given the importance of Indian fisheries to the Indian economy, the role of MPEDA and the impact of its schemes has been detailed out in subsequent chapters.



CHAPTER 3
**PROJECT
BACKGROUND**

3 Project Background

India is the 2nd largest aquaculture and 4th largest fish exporting nation in the world. Fisheries and aquaculture sector provides livelihood to about 28 million fishers and fish farmers at the primary level and twice the number along the value chain. India shares 8% to the global production and contributing 1.1% to India's Gross Value Added (GVA) and 6.72% (2020-21) to the agricultural GVA.

Fisheries sector in India has grown with an average annual growth rate of 10.34% during the year from 2014-15 to 2020-21. The fish production in India has registered an average annual growth of 7.53% from 2014-15 to 2020-21. The export of marine products stood at 1.29 million metric tons and valued at INR 46,662.85 crore (USD 6.67 billion) during 2019-20.⁷

India exports frozen shrimps, fish, cuttlefish, squids and dried items and live, and chilled items. Frozen shrimps constitute 75% of export by value and 53% of export by quantity USA and China are the top importers of Indian seafood⁸.

Under the PM Matsya Sampada Yojana (PMMSY), one of the outcomes targeted by the National Fisheries Development Board (NFDB) is the doubling of export earnings from INR 46,589 crore (2018-19) to INR 1,00,000 crore by 2024-25. This is aimed to be achieved through species diversification, value-addition, infrastructure creation and modernization, end-to-end traceability, brand promotion, certification, etc. in association with Marine Products Export Development Authority (MPEDA).

3.1 Marine Products Export Development Authority

MPEDA was set up by an act of Parliament in 1972. The Act empowers MPEDA to regulate exports of marine products and take all measures required for ensuring sustained, quality seafood exports from the country. MPEDA as the nodal agency for the holistic development of the seafood industry in India focuses mainly on Market Promotion, Capture Fisheries, Culture Fisheries, Processing Infrastructure & Value addition, Quality Control, Research and Development. Based on the recommendations of MPEDA, Government of India notified new standards for fishing vessels, storage premises, processing plants, and conveyances.

Roles & Responsibilities

- Registration of infrastructural facilities for seafood export trade.
- Collection and dissemination of trade information.

⁷ Handbook of Fisheries Statistics 2020, Government of India

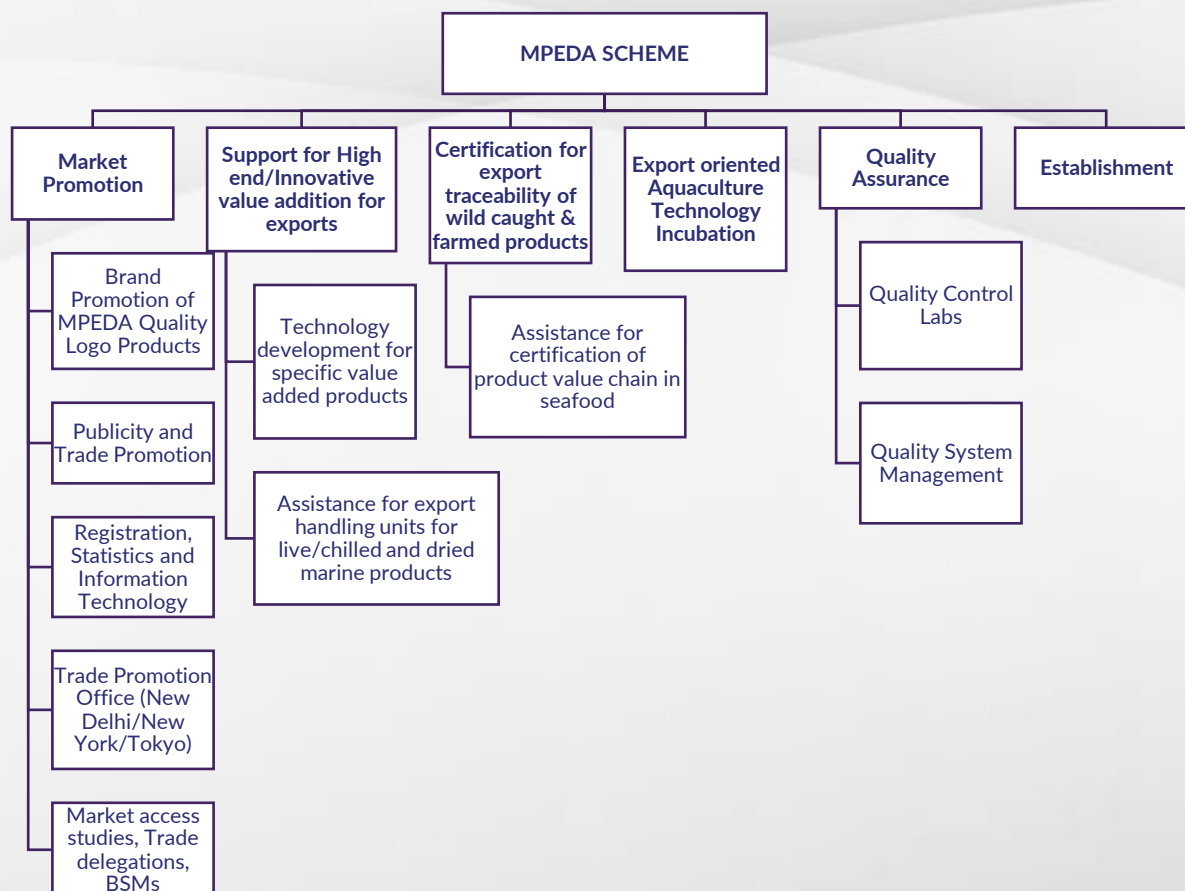
⁸ Handbook of Fisheries Statistics 2022, Government of India

- Promotion of Indian marine products in overseas markets.
- Implementation of schemes vital to the industry by extending assistance for infrastructure development for better preservation and modernized processing following quality regime.
- Promotion of aquaculture for augmenting export production through hatchery development, new farm development, diversification of species and up gradation of technology
- Promotion of deep-sea fishing projects through test fishing, joint ventures, and up gradation & installation of equipment to increase the efficiency of fishing.
- Market promotional activities and publicity.
- To carry out inspection of marine products, its raw material, fixing standards and specifications, training, regulating as well as to take all necessary steps for maintaining the quality of seafood that are marketed overseas.
- Impart trainings to fishermen, fish processing workers, aquaculture farmers and other stake holders in the respective fields related to fisheries, promotion of modernization of fishing harbours.
- Conduct research and development for the aquaculture of aquatic species having export potential through Rajiv Gandhi Centre for Aquaculture (RGCA).
- Conduct extension and awareness activities, trainings etc. through Network for Fish Quality Management and Sustainable Fishing (NETFISH) & National Centre for Sustainable Aquaculture (NaCSA).
- To prescribe for itself any matters required for protecting and augmenting the seafood exports from the country in the future.

The central sector scheme of MPEDA is presented below. It has various sub-components to address different needs of various stakeholders in this ecosystem. It offers financial assistance, training programs, technical assistance, and laboratory services. It also offers other support services such as trade promotions, export facilitation certificates and registration of stakeholders and export units.

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

Figure 5: Components and Sub-components of MPEDA Central Sector Scheme



Source: MPEDA

Table 5: Description of components of MPEDA Central Sector Scheme

Component	Objective
Market Promotion	Promotion of Indian seafood in overseas markets through various promotional campaigns utilizing trade promotion offices, and digital media, including advertisements, participation in trade fairs, trade delegations, market studies, buyer-seller meets etc.
Support for high end/ innovative value addition for exports	Assist export processing units on expenses related to certification, infrastructure upgradation/ modifications and encourage value addition in the sector.
Certification for export traceability of wild caught & products farmed	Carry out sector-specific export promotion activities viz. providing export facilitation certificates to comply with the import market regulations concerned. Forming clusters of small-scale and marginal farmers for sustainable and quality shrimp production.
Export oriented aquaculture technology incubation	Development of incubation centers for aquaculture such as farming through cage culture, pen culture etc.

Component	Objective
Quality Assurance	Improve the quality of marine products exported, through the creation of infrastructure testing infrastructure and providing testing services to the sector.

Source: RFP for this study, Document: SFC MPEDA Final V14 12-09-17

Budget Outlay for MPEDA Scheme

Standing Finance Committee approved Rs. 480 crore for the Implementation of the 'Marine Products Export Development Scheme' by MPEDA for the Medium-Term Framework Plan (2017-18 to 2019-20).

Table 6: Budget Outlay for MPEDA Scheme (2017-20) in Rs. Crore

S No.	Name of the Sub-scheme / Component	2017-18	2018-19	2019-20	TOTAL
A	Market Promotion	18.59	22.93	26.51	68.03
A1	Brand Promotion of MPEDA Quality Logo Products	1.25	1.25	1.50	4.00
A2	Publicity and Trade Promotion	10.60	14.25	16.68	41.53
A3	Registration, Statistics, and Information Technology	1.24	1.38	1.70	4.32
A4	Trade Promotion Office (New Delhi / New York / Tokyo)	3.00	3.30	3.63	9.93
A5	Market access studies through in house and external experts, Trade delegations, Buyer Seller meets	2.50	2.75	3.00	8.25
B	Support for High End/Innovative Value Addition for Exports	23.83	29.24	36.81	89.88
B1	Technology development for specific value-added products.	22.00	26.88	34.00	82.88
B2	Assistance for the export handling units for Live, Chilled and Dried marine products.	1.83	2.36	2.81	7.00
C	Certification for Export Traceability of Wild Caught & Farmed Products	12.99	15.85	18.80	47.64
C1	Assistance for certification of product value chain in seafood	12.99	15.85	18.80	47.64
D	Export Oriented Aquaculture Technology Incubation	25.82	27.25	33.28	86.35
E	Quality Assurance	35.31	30.70	30.79	96.80
E1	Quality Control labs	32.25	26.37	27.18	85.80
E2	Quality System Management	3.06	4.33	3.61	11.01
	Total	116.54	125.97	146.19	388.70
F	Establishment	29.21	29.71	32.38	91.30



CHAPTER 4

**APPROACH AND
METHODOLOGY**

4 Approach and Methodology

4.1 Scope of the Project

The scope of work required conducting an evaluation & impact evaluation of the central sector scheme of the MPEDA for the SFC period 2017 - 2020.

4.2 Study Objectives

To understand the effectiveness and impact of the scheme, the study:

- Identified the problems/hurdles in the implementation of scheme.
- Assessed the effectiveness of the scheme.
- Identified the area of difficulty in the implementation of scheme through the beneficiary's perspective.
- Analysed the outcomes of the international fair participation through participant feedback.
- Assessed the ease of applying for the scheme by the beneficiary, time period from submission of the application and release of assistance/certificate, efficiency of the online portal, and ease of providing documents and the beneficiary satisfaction.
- Evaluated the need and effectiveness of trainings & capacity building.
- Evaluated the impact of the assistance on the promotion of marine products export.
- Provided recommendations for improvement of the scheme.

4.3 Methodology

4.3.1 Impact Evaluation Framework for MPEDA Scheme

The OECD DAC Network on Development Evaluation (EvalNet)⁹ has defined six evaluation criteria – relevance, coherence, effectiveness, efficiency, impact, and sustainability.

⁹ OECD. (2023). *Evaluation Criteria* - OECD. [www.oecd.org](https://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm).
<https://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm>

Table 7: OECD-DAC Impact Evaluation Framework

Criteria	Question	Definition
Relevance	Is the intervention doing the right things?	The extent to which the intervention objectives and design respond to beneficiaries, global, country, and partner/institution needs, policies, and priorities, and continue to do so if circumstances change.
Efficiency	How well are resources being used?	The extent to which the intervention delivers, or is likely to deliver, results in an economic and timely way.
Effectiveness	Is the intervention achieving its objectives?	The extent to which the intervention achieved, or is expected to achieve, its objectives, and its results, including any differential results across groups.
Impact	What difference does the intervention make?	The extent to which the intervention has generated or is expected to generate significant positive or negative, intended, or unintended, higher-level effects.
Sustainability	Will the benefits last?	The extent to which the net benefits of the intervention continue or are likely to continue.
Coherence	How well does the intervention fit?	The compatibility of the intervention with other interventions in a country, sector, or institution.

This framework has been applied to the MPEDA Scheme to assess the impact of its various components on different stakeholders in the marine products value chain.

4.3.2 Heuristics Evaluation Framework for assessment of online portals

A heuristic evaluation is a method for identifying design problems in a user interface. To assess usability, Jakob Nielsen's 10 usability heuristics will be used as a guideline. The guideline heuristics have been outlined below.

Table 8: Heuristic Evaluation Framework

Heuristic	Description	Explanation
Visibility	Show system status and tell what's happening	The interface should always keep users informed about what is going on through appropriate feedback within reasonable time.
Freedom	Provide good defaults and undo	Allow users to leave the unwanted state and have a clearly marked "emergency exit".
Error Prevention	Help users avoid making mistakes	Eliminate error-prone conditions or check for them. Present users with a confirmation option before they commit to the action.
Flexibility	Make advanced tasks fluid and efficient	Allow users to tailor frequent actions and efficiency of use.
Error Recovery	Help users recognize, diagnose, and recover from errors	Error messages should be expressed in plain language, precisely indicate the problem, and constructively suggest a solution.
Mapping	Use familiar metaphors and language	Speak the users' language, words, phrases, and concepts
Consistency	Use the same language and interface throughout	Make sure that the user interface is predictable and learnable.
Recognition	Make information easy to discover	Minimize user's memory load by making objects, actions, and options visible or easily retrievable whenever appropriate.
Minimalism	Provide only necessary information in an elegant way	Every extra unit of information competes with the relevant units of information and diminishes their relative visibility.
Help	Use proactive and in-place hints to guide users	Provide necessary help and documentation. Any such information should be easy to search, focused on the user's task, list of concrete steps to be carried out and not be too large.

Source: Nielsen Norman's Heuristic Evaluation

For this study, we used the Nielsen Norman Group’s Heuristic Evaluation to assess and report the level of user-friendliness of the web portals offered by MPEDA for the central sector scheme.

4.4 Sampling

Purposive sampling method was used. The sample was drawn from the list of beneficiaries during the period 2017-2020 and their geographical distribution. States of Andhra Pradesh, Gujarat, Karnataka, Kerala, Maharashtra, and Tamil Nadu were covered. They are distributed by schemes and programs as tabulated below.

Table 9: Sampling frame

Scheme	Beneficiaries	Sample
Market promotion - International Fairs	40	10
Financial Assistance for Mini Labs	10	5
Financial Assistance for Value-Added	98	40
Moving towards Certification (MTC) for Primary Production	90	35
Other Support Functions – Certificates, Lab services & Training	Multiple	20
Total	238	110

4.5 Report and data limitations

Time lag between scheme implementation and impact survey conducted causing respondents to rely on recall. To counter this, the study questionnaire included recall cues adopting a storyboard approach.

This report focused only on the evaluation of impact of the Central Sector Scheme of MPEDA for the SFC 2017-2020 period. The selection of beneficiaries are also from the same period. Therefore, the impact is restricted and limited to the benefits realised for the said time period alone.

A person is standing on a sandy beach, looking out towards the ocean. The image is overlaid with several geometric shapes: a large, light blue circle that frames the person, a smaller white circle, a white outline circle, and a light blue circle at the bottom left. The text is positioned to the right of the person, within the large blue circle.

CHAPTER 5
**SURVEY DATA
ANALYSIS AND
FINDINGS**

5 Survey Data Analysis & Findings

This chapter covers the impact evaluation framework, the analysis of different scheme components and the key findings from the responses of 110 sample beneficiaries. The geographical coverage of the respondents includes the states of Andhra Pradesh, Gujarat, Karnataka, Kerala, Maharashtra, and Tamil Nadu. The composition of respondents is exporters, aquaculture farmers, boat owners, and farmer societies.

5.1 Impact Evaluation Areas

The evaluation of impact of schemes and services have been conducted based on the OECD-DAC's REESI framework. The respondent beneficiaries provided their feedback on the different schemes, services and trainings represented through these evaluation questions.

Table 10: Impact Evaluation Questions based on REESI framework.

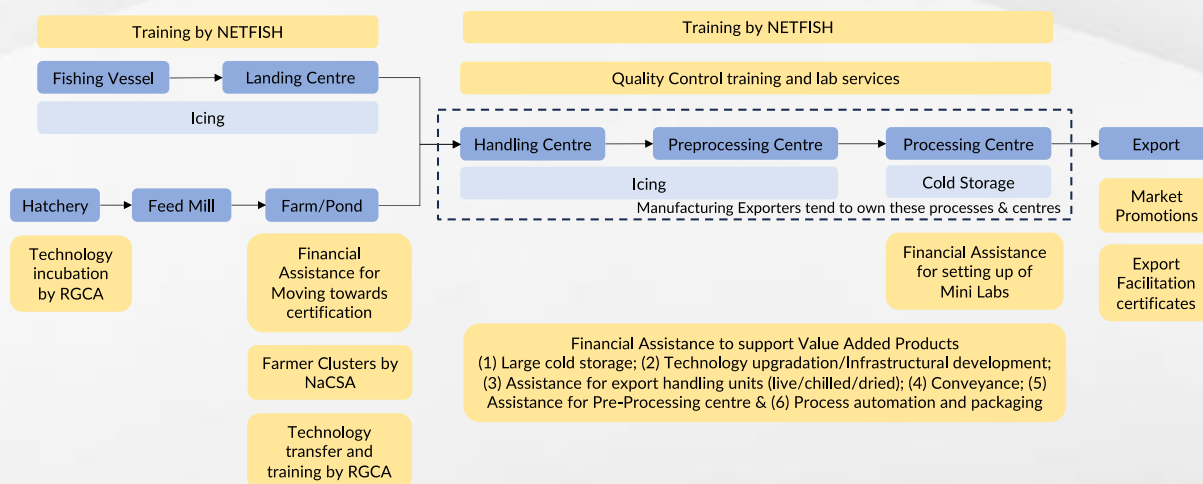
Dimension	Evaluation Questions
Relevance Is the intervention doing the right things?	<ul style="list-style-type: none"> • How do you perceive the relevance of the MPEDA scheme components in addressing your specific needs and objectives? • Did the market promotion activities supported by MPEDA align with your target markets and export goals? • Did the technical assistance and lab services help you export better quality marine products? • Were the species promoted/technology transferred by RGCA as per the need of the sector?
Effectiveness How well are resources being used?	<ul style="list-style-type: none"> • How has your participation in MPEDA-supported international fairs or exhibitions helped improve your exports? • How has the financial assistance provided by MPEDA for value addition contributed to enhancing the competitiveness of your export products? • What challenges, if any, have you encountered during the application process for export facilitation certificates, and how has MPEDA supported you in overcoming those challenges?
Efficiency	<ul style="list-style-type: none"> • How long did it take to collect the documents required to submit the online application?

Dimension	Evaluation Questions
<p>Is the intervention achieving its objectives?</p>	<ul style="list-style-type: none"> • What was the time taken for getting the approval for your application? • How much time does it takes for you to get the certificate after applying? • Whether you received timely technical assistance from RGCA? • What is your opinion about the arrangements for the training?
<p>Impact</p> <p>What difference does the intervention make?</p>	<ul style="list-style-type: none"> • How has the assisted infrastructure helped you in product diversification and increasing export earnings? • How did the scheme benefit your society/cluster? • Whether the formation of cluster helped in better market access and price realisation? • Was the training useful for you to develop a HACCP plan for your unit?
<p>Sustainability</p> <p>How to sustain and scale the benefits of the schemes?</p>	<ul style="list-style-type: none"> • Do you think the online system requires any modifications? If yes, please mention the same. • Any suggestions to improve the schemes and sub-schemes? • How do you feel the training can be improved further? Any suggestions?

5.2 Impact assessment of the Central Sector Scheme

The role of different schemes and programs under the Central Sector Scheme of MPEDA for the SFC 2017-2020 period have been presented along the value chain of the fisheries and aquaculture industry.

Figure 6: Position of Central Sector Scheme of MPEDA in the value chain



Source: Athena analysis

The feedback from the respondent beneficiaries for respective schemes have been covered in the subsequent sub-sections.

5.2.1 Support for high end/ innovative value addition for exports

Special emphasis has been given for the promotion of export of value-added products as there is an increasing global demand for value added products in convenient form. The Scheme is aimed to bring in more investment in high end Value Addition and also on establishment of appropriate facilities to export live, chilled, and dried marine products having high unit value.

There are various sub-schemes under this scheme that include:

- Technology development for Specific Value-Added Products
 - Technology Upgradation Scheme for Marine Products
 - Assistance for Infrastructural Development for Value Addition
 - Assistance for Process Automation and Packaging
 - Assistance for Large Cold Storage
- Assistance for export handling units for Live/Chilled and Dried marine products

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

57% of beneficiaries received 75% of the assistance and they belonged to three states – Andhra Pradesh, Kerala, and Karnataka.

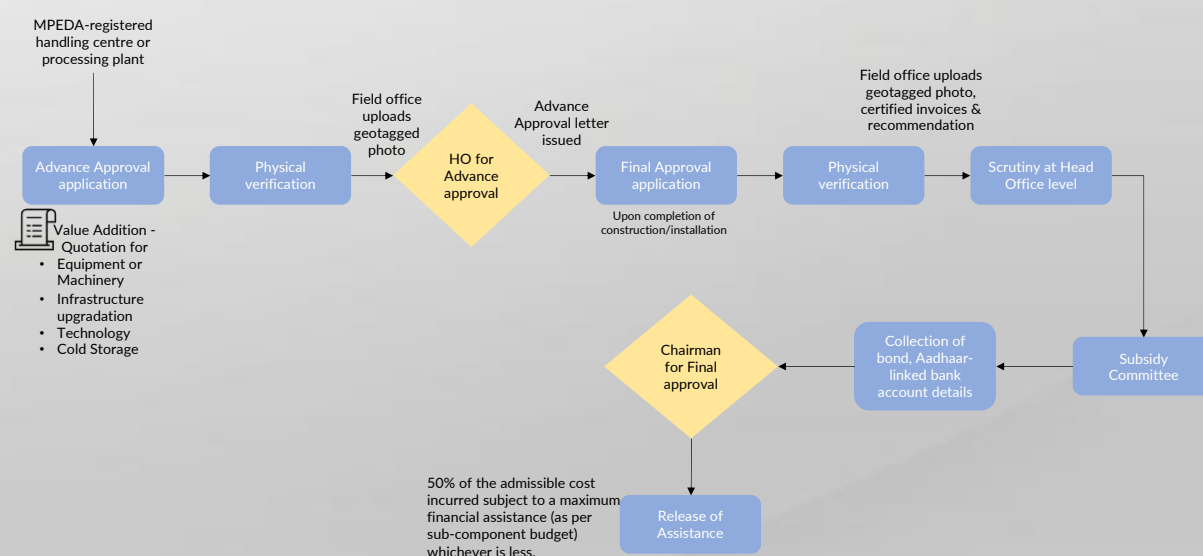
Table 11: Distribution of financial assistance for value-added products (2017-2020)

	2017-18		2018-19		2019-20		Total	
	No. of beneficiaries	Financial assistance (in INR lakh)	No. of beneficiaries	Financial assistance (in INR lakh)	No. of beneficiaries	Financial assistance (in INR lakh)	No. of beneficiaries	Financial assistance (in INR lakh)
Andhra Pradesh	9	478.5	14	960.28	3	158.3	17	1118.58
Goa	3	169.66	0	0	1	38.66	1	38.66
Gujarat	12	108.46	5	75.71	7	91.91	12	167.62
Karnataka	4	182.33	1	1.89	3	148.43	4	150.32
Kerala	15	165	10	611.73	1	43.45	11	655.18
Maharashtra	9	388.02	8	109.41	2	496.05	10	605.46
Odisha	2	12.26	2	8.33	1	150	3	158.33
Tamil Nadu	32	184.36	2	69.44	2	95.38	4	164.82
West Bengal	3	114.29	1	1.5	4	142.89	5	144.39

Source: Data received from Development section, MPEDA on 09 Aug 2023.

Document: State-wise Assistance Details from 2013-14 to 2022-23

Figure 7: Application workflow to avail financial assistance for support for Value-Added Products



Source: Scheme document received from Development section, MPEDA on 09 Aug 2023

Document: TDSV Scheme(2)

The financial assistance scheme was reported to be very useful during the primary survey. Their only source of awareness about the scheme and scheme-related information was MPEDA.

Business Profile of the respondents was such that 66% of them exported single segment, fishes or shrimps alone. Their average annual export ranged from INR 30 to 600 crore. 88% of the respondents operated in diversified markets with a focus on USA and EU.

Only 53% of the respondents filled the application online. MPEDA officials were supportive in the filling up of application and clarifying doubts that came along the way. However, they faced challenges in uploading documents facing network and server errors apart from low file size limit.



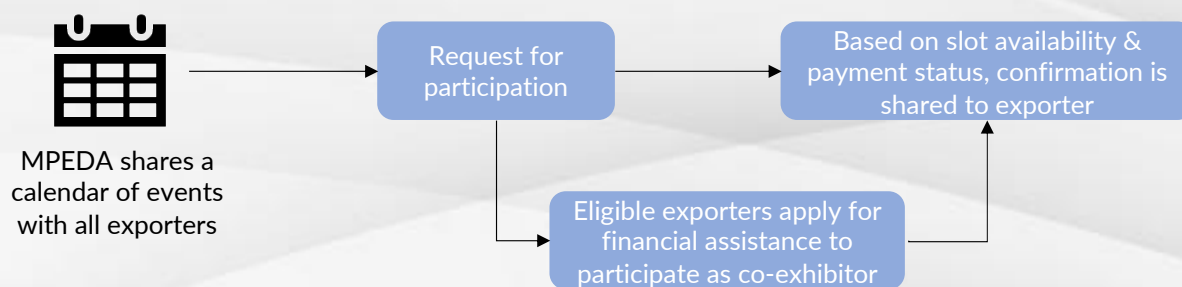
83% of the respondents found the scheme ‘excellent’. 50% of them found the assistance amount to be ‘adequate’. 27% of respondents used the Advance Approval letter to purchase products faster or secure bank loan.

In terms of documentation, respondents found securing the CE certificate and pollution control board certificate to be particularly difficult.

Other challenges highlighted by some of the beneficiaries in increasing the value and volume of value-added exports include the higher lead time in securing import permit and clearances of raw materials, involvement of multiple agencies such as EIC, Customs and FSSAI in issuing clearance and cost of testing the samples of imported items. This reduces the opportunity for exporters to import raw materials for further processing for exports.

5.2.2 Market Promotion

To keep up with the competition in the international markets, MPEDA enables participation of exporters in the International Seafood Fairs each year and organizes buyer-seller meets to help exporters expand their market and buyers. In addition, small exporters (export value less than USD 20 million) receive financial assistance from MPEDA to participate in these fairs as co-exhibitors.



Intended outcomes of such participation

- (I) Connect with new buyers and markets.
- (II) Trade enquiries

Efficiency: 80% of the respondents found the support extended by MPEDA in enabling participation in the fairs as satisfactory.

Effectiveness: 40% of the respondents reported that they were able to access new buyers from the trade enquiries. 30% of the respondents did not find the enquiries useful. This was primarily attributed to two reasons – exporters had a strong market connect already and the email response rate is much lower than direct engagement with buyers. Newly established exporters especially those attending for the first time may require more handholding support in presenting their products in the stall.

Some of the unintended benefits reported were faster visa approvals, support in consolidation of samples for display.

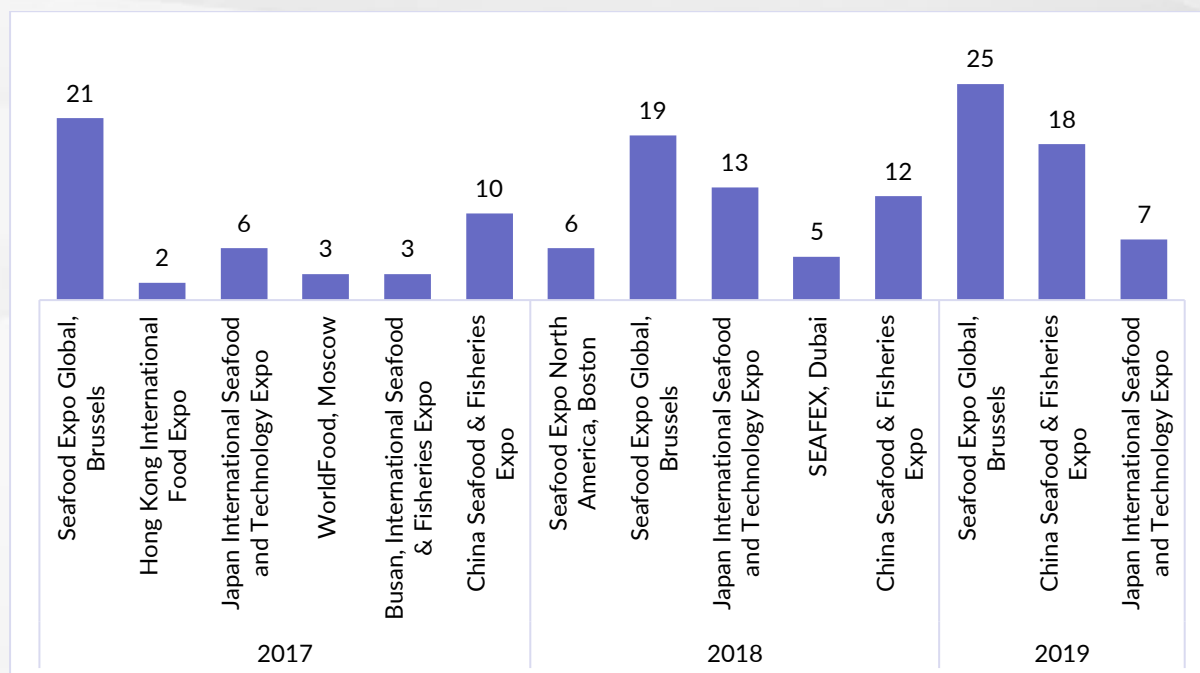
“Stalls act as great pull factor for sales.”
- Exporter

In contrast, 60% of the respondents expect MPEDA’s support in providing information on new markets. 30% of the respondents feel a more continuous engagement of MPEDA and the exporters would be helpful.

Impact: Around 20% of the respondents reported an increase in exports after engaging with buyers from the international fairs. One exporter reported an export value of INR 55 crore while another exporter reported a 2-3% increase in exports.

Relevance and Sustainability: Between 2017 and 2019, there were a total of 150 co-exhibitors in the 14 fairs organised. Of them, 96 (64%) were unique exporters. Many exporters participate in multiple fairs in the same year and over the years as well. While the participation may be voluntary, it is important to encourage more unique participation.

Figure 8: Distribution of Co-Exhibitors in International Seafood Fairs (2017-2019)



Source: Data received from Newsletter desk, MPEDA on 16 Aug 2023

Note: No international fairs happened in 2020 due to COVID pandemic. Virtual events were organized.

5.2.3 Quality Assurance

To meet the food safety and quality standards and ensure consumer protection, stringent hygiene measures have been adopted at the national, regional, and international levels, based on the Codex Code of Practice for Fish and Fishery Products (Codex Alimentarius Commission, 2016) and its guidance to countries on practical aspects of implementing good hygiene practices and the Hazard Analysis Critical Control Point (HACCP) food safety management system.

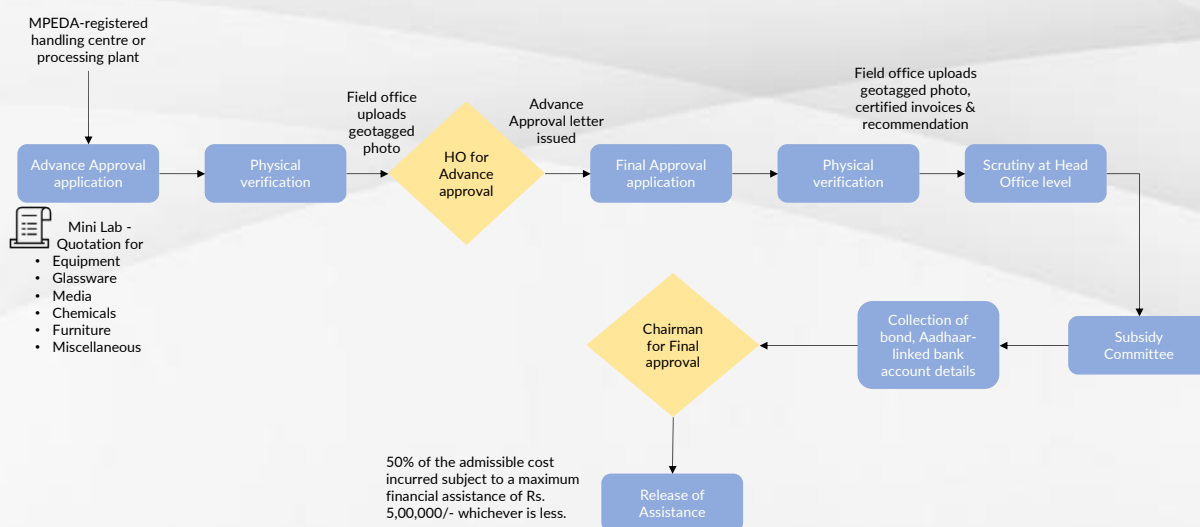
5.2.3.1 Financial Assistance for setting up of Mini Labs

The scheme provides financial assistance for establishment of laboratory for microbial and chemical parameters of fishery products intended for export purpose in approved processing plant/ handling centre testing of fishery products.

The main objective of the scheme is to enable in-house testing of the export consignments at the processing plant level. It is a mandatory requirement for approval of the unit as it also helps in verification of the effectiveness of HACCP implementation of the processing establishment.

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Figure 9: Approval process for application for financial assistance for mini labs

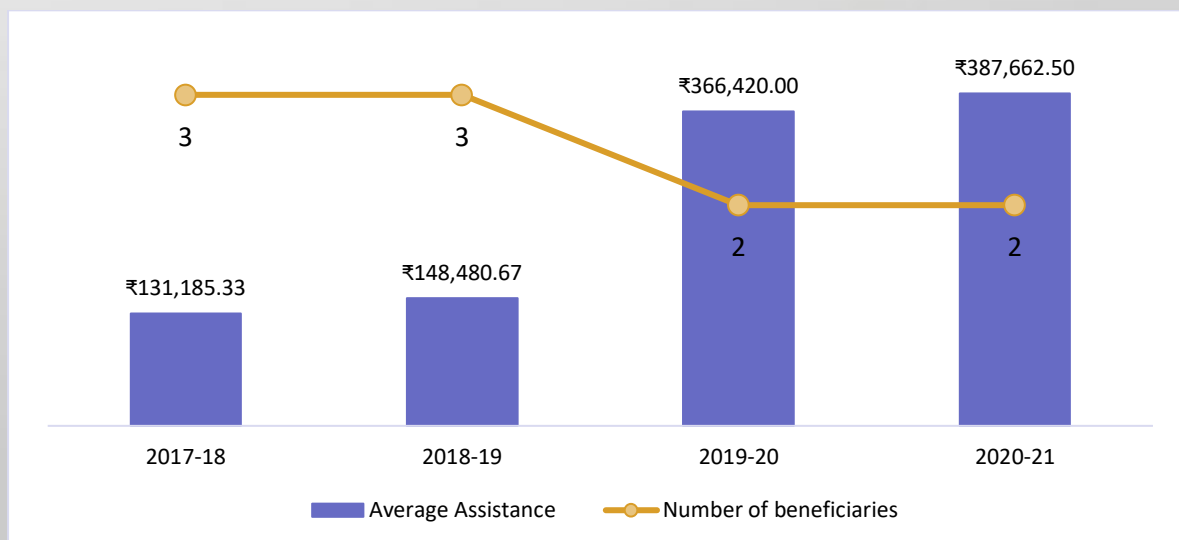


Source: Financial Assistance for Mini Labs scheme document, MPEDA

Subsidy Committee consists of Joint Director (Quality Control) or Joint Director (Marketing) as the Chairman and one member each from Central Institute of Fisheries Technology (CIFT), National Institute for Fisheries Pre-Harvest Testing and Training (NIPHATT) and Seafood Exporters Association of India (SEAI).

Applications are processed based on 'first come first serve' basis. The approval process is as described in Figure 9. The final approval is provided based on the Chairman's approval considering the recommendations of the Subsidy committee and availability of funds in that year's budget. During SFC 2017-2020 period, an average of 2 applications were approved.

Figure 10: Distribution of beneficiaries and average assistance received for SFC 2017-2020



Source: MPEDA

The application for advance approval can be filled as a physical application or on e-mpeda portal using the beneficiary login. 60% of the respondents filled the physical application form while 40% filled it online.

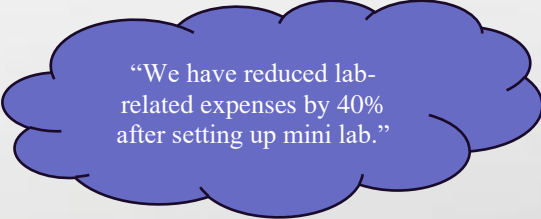
Respondents found the application form easy to understand and fill. They found the officials in the MPEDA field office to be supportive throughout the process.

On an average, the respondents reported that the time elapsed between advance approval and final approval range between four and six months.

100% of the respondents reported that the assistance for mini labs was useful. Only 20% of the respondents felt an assistance of 60-70% would be more sufficient.

The in-house laboratories carry out routine microbial and chemical analysis of fish and fishery products so as to ensure process controls and production of safe and quality seafood intended for exports. In the primary survey, the beneficiaries reported that they tested at least 2000 samples per day.

60% of the respondents reported to have better control over quality. 20% of the respondents reported they could get the test results faster. Lower costs of testing were realised because private labs tend to charge fee based on number of parameters.



“We have reduced lab-related expenses by 40% after setting up mini lab.”

Only concern raised by the respondents was with regard to the media and chemicals as they formed part of recurring costs and felt that some assistance to help them properly dispose the unused chemicals would be very useful.

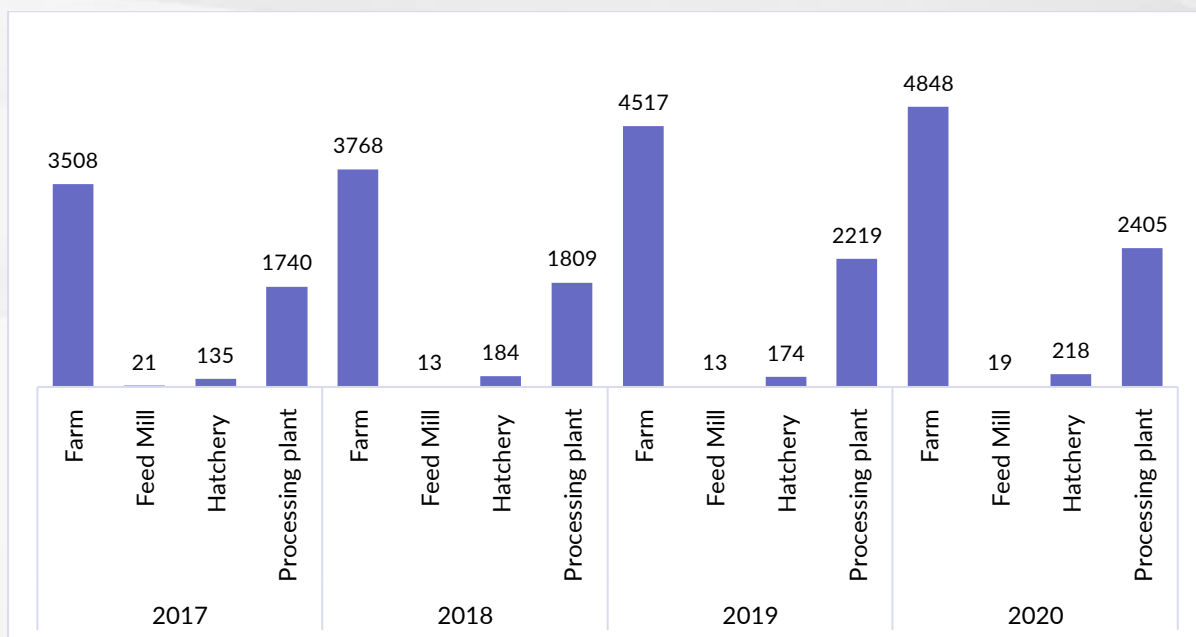
5.2.3.2 Quality Control and ELISA labs

To monitor the control over the residues of unauthorized substances and environmental contaminants in fish & fishery products, MPEDA has established five Quality Control (QC) Laboratories in five locations across India to provide advanced and state-of-the-art testing facilities to the stakeholders. The National Residue Control Plan (NRCP) is a statutory requirement to be implemented by the countries for exporting to EU countries. The conceptualisation, planning and implementation of NRCP is undertaken by the MPEDA QC labs.

25,591 samples were tested during the 2017 to 2020 period. Majority of the samples were tested from either farm or processing plant as seen in Figure 11.

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

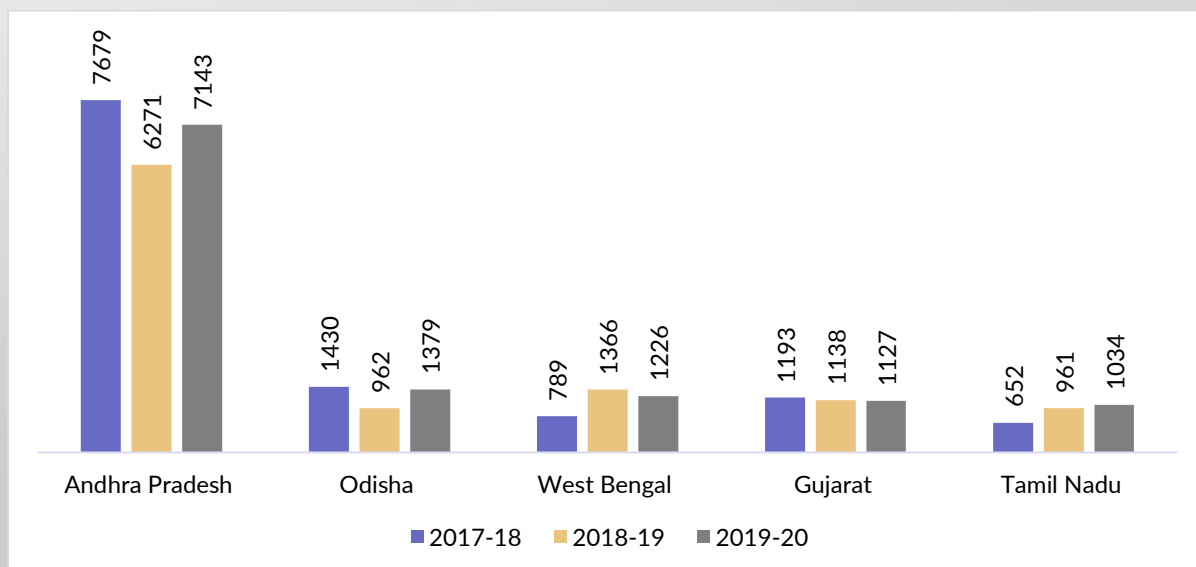
Figure 11: Samples tested under NRCP during 2017-2020 at different sources.



Source: Data shared by QC Section, MPEDA on 14 Aug 2023

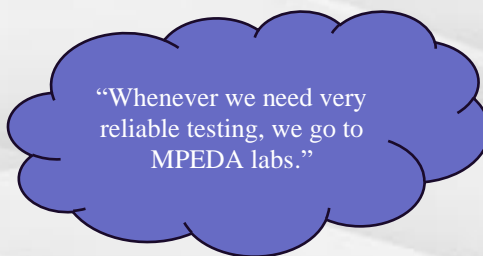
ELISA Screening laboratories in coastal states support the farming community in ensuring the quality and traceability of the shrimp crops they have produced for export supply. The cultured or farmed shrimps are tested for antibiotics residue before they are harvested. The test result is issued in the form of Pre-Harvest Test certificates. MPEDA operates 14 ELISA labs across India. An average of 11,000 samples were tested annually during 2017-2020.

Figure 12: State-wise distributions of PHT certificates issued (2017-2020)



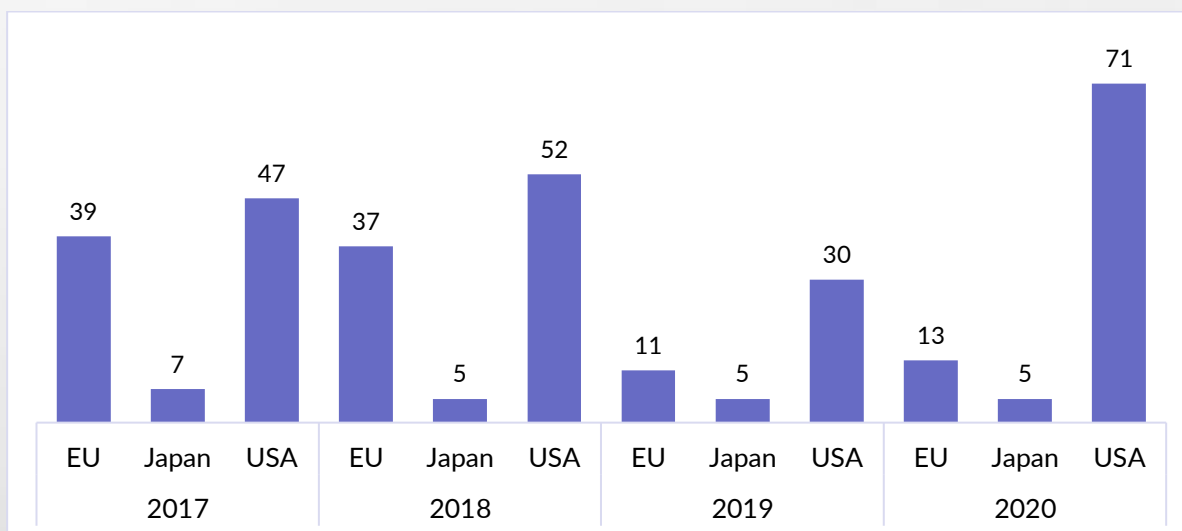
Source: Data shared by QC Section, MPEDA on 14 Aug 2023

Most respondents were aware of the MPEDA lab services but typically opted services of the private labs. They found private labs relatively cheaper and more accessible than MPEDA labs. Respondents who availed MPEDA lab services found the services to be reliable and the persons at lab to be responsive and prompt in informing the test results.



The outcome of adhering to high quality standards of exported products is reflected in the form of low rejections at the international markets. 70% of the rejections from the USA were on account of residues of banned antibiotics, salmonella and filthy. 80% of the rejections from the European Union were on account of residues of banned antibiotics, cadmium, and poor temperature control. Rejection from Japan was only for residues of banned antibiotics.

Figure 13: Trend in export rejections for Indian seafood in the USA, EU, and Japan markets (2017-2020)



Source: Data shared by QC Section, MPEDA on 11 Aug 2023

5.2.4 Training & Capacity building

Various training programmes have been organised by MPEDA and the three societies, NETFISH, RGCA and NaCSA. They have been summarised for the SFC period, 2017-20 in Table 12.

Table 12: Participation in select training programs organised by MPEDA in 2017-2020

S. No.	Name of Training	No. of participants (2017-20)	Organised by
1	HACCP	405	MPEDA-QC
2	Value-Added	472	MPEDA-Development

S. No.	Name of Training	No. of participants (2017-20)	Organised by
3	Training & Skill development	30,292	MPEDA-Aqua
4	Training	1,36,958	NETFISH
5	Trainings/Meetings	66,630	NaCSA
6	Training	1,528	RGCA

Source: MPEDA Annual Reports 2017-2020; RGCA website¹⁰

- 100% of respondents who participated in HACCP & Value-add training found the programs useful and trainer to be very knowledgeable.
- Local language support was crucial in the positive experience of Value-added training.
- 100% respondents found the trainings useful and for HACCP, they were able to make their own manual.
- Most exporters have not adopted value-added production line due to cost of establishment, limited knowledge of transferring learnings from training to production line.
- Encourage the foreign expert to stay for longer duration to enable transfer of learning.
- Demonstration training helped respondents realise scope for species diversification. However, the adoption remains a challenge as the number of beneficiaries are high and difficult to monitor utility. Moreover, seed availability to cater to the demand is presently not commercially available.

Network for Fish Quality Management and Sustainable Fishing (NETFISH) is a society formed as an extension arm of MPEDA. NETFISH functions for improving the quality of fishery products exported from the country and the sustainability of fishery resources as well. NETFISH achieves this goal through grass root level capacity building activities among fishermen, boat crew, harbour workers, fisherwomen, pre-processing and processing workers, technicians, other fishery stakeholders etc. on fish quality management, conservation of fish resources and sustainable fishing. Since inception, NETFISH has successfully conducted more than 27,500 extension programmes whole through the country.

¹⁰ https://v2.rgca.co.in/f_trainprog.php

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Table 13: Training programs conducted by NETFISH (2017-2020)

#	Type of programme	2017-18		2018-19		2019-2020	
		Total No. of programmes	Total No: of Beneficiaries	Total No. of programmes	Total No: of Beneficiaries	Total No. of programmes	Total No: of Beneficiaries
1	Square mesh popularization/Quality/Conservation programme at harbours/landing centres	636	18564				
2	Fish Quality Management/Conservation			604	17449		
3	Harbour/Landing Centre/Fishermen Village Training Programmes					701	20167
4	Square mesh fabrication training	28	753	48	2174		
5	Onboard training	178	2334	136	1771	162	2022
6	Pre-processing centre training	151	4258	112	3300		
7	Processing centre training	47	1386	40	1222		
8	Pre-processing/Processing Centre Training Programmes					101	2991
9	Dry fish training	233	6829	185	5425	106	3090
10	VHSE programme	18	759	19	794		

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#	Type of programme	2017-18	2018-19		2019-2020		
		Total No. of programmes	Total No: of Beneficiaries	Total No. of programmes	Total No: of Beneficiaries	Total No. of programmes	Total No: of Beneficiaries
11	Value addition of fishery products	44	1125	39	1063		
12	Skill Development Training Programmes (Square Mesh Fabrication, Value Addition, Tuna Long Lining etc.)					46	899
13	Other livelihood development programme	7	255				
14	Exposure visits	4	69	2	30		
15	GPS Handling/Eco sounder training	33	971	27	785		
16	Tuna Processing training	12	263	14	240		
17	Cleanup programme	21	1207	31	2162		
18	School programme	21	1608	39	2956		
19	Cuttle Fish Conservation programme	1	11				
20	Sea club programme	3	129	5	195		
21	Sea safety programme	8	344	53	1881	44	1622
22	Other Special programmes	158	13473	35	3153	134	7229

#	Type of programme	2017-18		2018-19		2019-2020	
		Total No. of programmes	Total No: of Beneficiaries	Total No. of programmes	Total No: of Beneficiaries	Total No. of programmes	Total No: of Beneficiaries
	including Street Play, Exhibition etc.						
	Grand Total	1603	54338	1389	44600	1294	38020

Source: Data extracted from NETFISH Annual Reports 2017-2020

Quality related training at the source for marine fisheries is offered by NETFISH. While the fishers and people working at the harbour appreciate the training, the cost of adopting all the appropriate behaviour is reported to be high.

In a study conducted on value chain management practices of fresh fish in Coastal Andhra Pradesh¹¹ revealed that the most significant contributors to final price of the produce are grading, packaging, and branding. This is followed by icing, removal of slime and weighing. The study also highlighted that sorting adds lesser value to the final price. Hence, adoption of practices and behaviour are determined by the incremental value realised as a consequence. Further, the ecosystem determines the pace at which desired practices get adopted.

5.2.4.1 Assessment of need and effectiveness of training and capacity building

Overall, the scale of training (number of participants targeted) is inversely proportional to the effectiveness of the training. Wherever the training and capacity building programs were targeted with smaller number of beneficiaries, the effectiveness was greater which was indicated the beneficiaries' ability to recall specific information and learnings from the programs. While there is explicit need for such training, these programs have to be adjusted to accommodate the stakeholder needs and provide better handholding support to adopt the learning of these programs.

¹¹ Kotni, V V Devi Prasad. (2016). Value Chain Management in Marine Fisheries: A Case Study of Andhra Pradesh. International Journal of Managing Value and Supply Chains. 7. 09-19. 10.5121/ijmvsc.2016.7202.

5.2.5 Certification for export traceability of wild caught & farmed products.

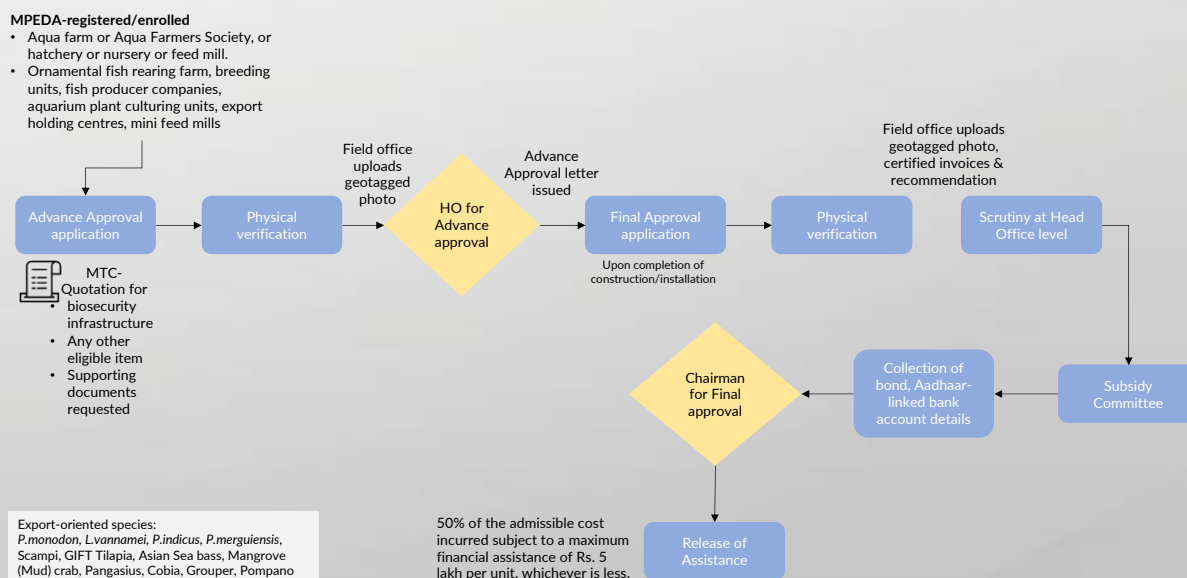
Fish farming allows greater control over production processes than do capture fisheries, and it is more conducive to vertical and horizontal integration in production and supply chains. As a result, aquaculture has expanded fish availability to regions and countries with otherwise limited or no access to the cultured species, often at cheaper prices, leading to improved nutrition and food security. The expansion in aquaculture production is due to species such as shrimps, salmon, bivalves, tilapia, carp, and catfish.

5.2.5.1 Financial Assistance for Moving towards certification

The financial assistance for moving towards sustainability and certification is aimed to help acquire certification standards and infrastructure/equipment for the production of quality seafood from aquaculture Farms/Hatchery/Feed mills/ ornamental fish breeding units/ rearing farms/ export holding facilities.

This scheme envisages capacity building of aquafarmers, small farmers in particular, to achieve the certification standards and facilitate them to get National Certification (SHAPHARI) or a Third-Party Certification thereby paving way for getting easy market access and earning better prices for their produce.

Figure 14: Application process flow to avail financial assistance for moving towards sustainability and certification.



Source: Interpretation of the Scheme Guidelines for Assistance for Certification of primary production, MPEDA-Aquaculture section

For the SFC 2017-2020 period, the average financial assistance provided was INR 2.9 lakh. For 90 beneficiaries, total financial assistance disbursed was INR 2.69 crore.

100% of the respondents have chosen *L.vannamei* as the crop of choice. The median farm size is 5.5 acres.

Respondents from Raigad, Maharashtra reported a unique challenge of not having local hatcheries and feed mill to support production. They usually source it from Andhra Pradesh and Tamil Nadu.

86% of the respondents filled a physical application form and almost always took help of friends, family members and MPEDA officials to fill the form.

The time to purchase and install the required biosecurity infrastructure took between 6 months and 2 years before the respondents applied for final approval to receive the assistance.

45% of the respondents felt that an increase in the subsidy amount would be helpful as the cost of establishing the farm is between six and seven lakh rupees. MPEDA officials have also made representation to increase the eligible amount under the Kisan Credit Card from the regular INR 3 lakh that other agriculture farmers can avail for.

A unique challenge for the farmers from the SC/ST category is the insufficient access to formal credit. As a result, they are unable to fully utilise the 75% financial assistance and the advance approval letter to help purchase the required infrastructure for their farms.

Impact: Only 9% of the respondents reported to have sold their produce directly to the exporter. Remaining 81% sold it to agents but were not sure which market their produce was being exported to. Also, they faced other challenges such as water quality issues, power shortages and increasing input costs (mainly feed and labour).

Market-related challenges highlighted by the respondents include lower market price for their crop, and increasing input costs (feed and electricity).

5.2.5.2 Export Traceability

Around 78% of the fishery products traded worldwide are destined to international markets, so it is necessary to ensure that they do not come from fisheries that compromise the sustainability of resources and ecosystems, nor from illegal, unreported, or regulated (IUU) sources. Hence, traceability becomes a very useful tool to combat these practices and ensure the legitimate origin of the products.

According to World Wildlife Fund, traceability throughout the entire production chain helps:

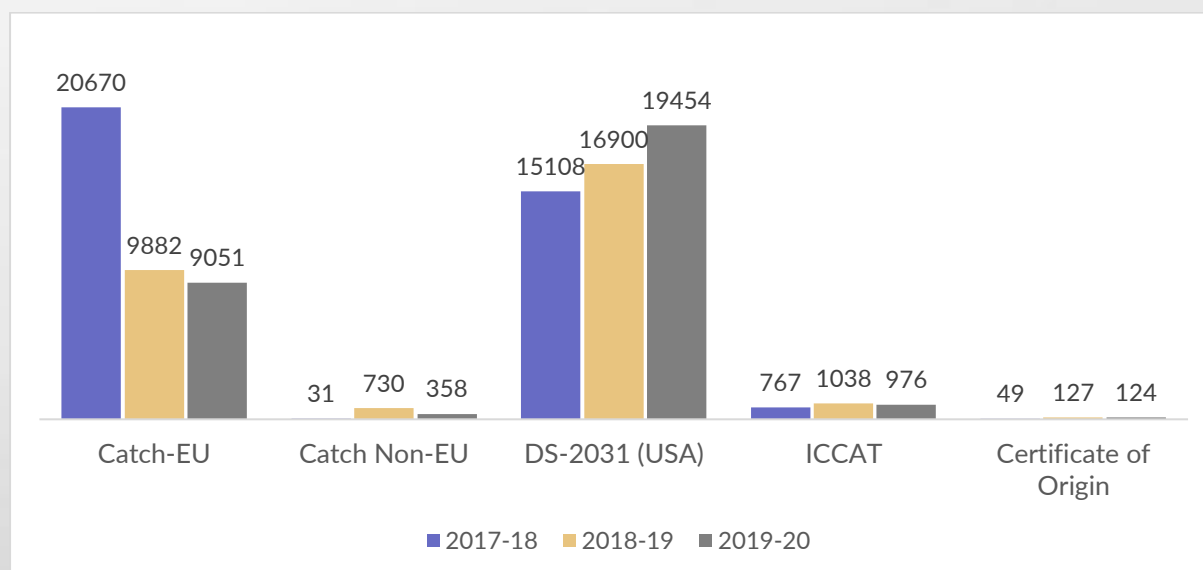
- Ensure traceable products to the point of origin from legal catches from regulated fisheries reports.

- Combat illegal trade in fishery products and other illicit activities that could be taking place.
- Fulfil the legal requirements of fishing activity, market demands and international sustainable fishing standards.
- Improve fishing regulations through better information of the supply chain and a greater transparency in the sea.

MPEDA enables traceability through its export facilitation certificates. For the sea caught species, Catch certificate is issued and the type of certificate is categorised based on the export market such as EU or Non-EU. With regard to shrimp exports to the USA, DS-2031 certificate is issued to declare that the shrimps were caught in a manner not harmful to the turtles or were harvested from aquaculture. ICCAT is a specialised certificate for Tuna species. These certificates are the most sought after by the exporters which is also an indication of the direction of trade for India.

Presently, for facilitating traceability of aquaculture products, MPEDA is implementing hatchery/farm enrolment with pond-wise geographical data.

Figure 15: Distribution of Export Facilitation Certificates (2017-2020)



Source: MPEDA Annual Reports (2017-18, 2018-19 and 2019-20)

All respondents found it easy to apply for export facilitation certificates. They got the certificate within 24 hours. They found the MPEDA officials to be supportive.

Exporters experience delay in getting certificates from Export Inspection Council, EIC (Health certificate). 18% of the respondents found accessing the certificates over the weekend difficult.

5.2.5.3 Farming clusters

More than 90% of Indian shrimp farmers belong to small-scale or marginal category with operational holdings of less than two hectare per individual. National Centre for Sustainable Aquaculture (NaCSA) was established by MPEDA as an outreach organization for uplifting the livelihood of small-scale shrimp farmers by helping them form societies and educating them about the better management practices (BMP) for safe and sustainable shrimp farming. Respondents found the MPEDA and NaCSA officials to be supportive and engaging. They also found the trainings offered to them useful.

Farming clusters aimed for the members to be able to reduce the production cost through efficient use of resources, avoiding unwanted chemicals and antibacterial agents, and sharing of expenses for developing infrastructure such as deepening of canals, seed testing, transportation of inputs, lab, electricity etc. Respondents informed that they were not able to procure seeds and feeds from a single entity to bargain for a better price.

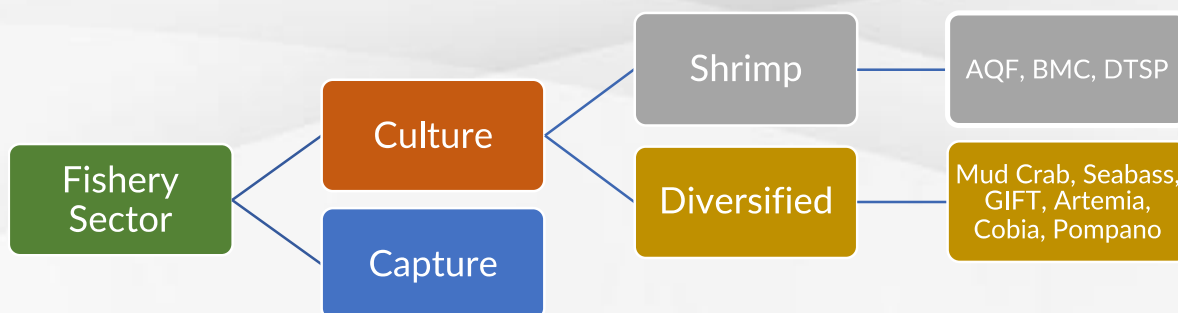
Societies facilitate access to institutional finance and insurance. It is a source for linking the farmers with processors and exporters for better market access and price. However, the benefits of getting better market price or improved market access have not been fully realised as all the respondents informed that the market price is determined by the agents or exporters who come to procure their shrimps.

Societies formed by farmers belonging to Scheduled Castes reported that they were unable to access institutional credit timely and hence, were unable to fully utilise the benefits of the financial assistance scheme within the advance approval period.

5.2.6 Export oriented aquaculture technology incubation

Rajiv Gandhi Centre for Aquaculture (RGCA) is a Research & Development arm of MPEDA for diversified aquaculture. The technology developed by RGCA is in commercial mode and the deliverable will be extended to the needy farmers & entrepreneurs in India and abroad under Technology Transfer agreement. RGCA is seen as Aquaculture Technology Incubation Centre of MPEDA to promote aquaculture of commercial species for export purposes.

Figure 16: Key focus areas of RGCA



Source: RGCA Activities document shared on 11 Aug 2023

Below table summarises the quantum of seeds distributed for the species promoted under species diversification project

Table 14: Distribution of seeds for species diversification by RGCA since inception of the projects

Species	Particulars	Quantity
Seabass	Total number of seed supplied (from 2000)	25.8 million
	No. of beneficiaries	3007
	Area promoted	4251 Ha (0.5/m ²)
Mudcrab	Total number of crab-instar/crablets supplied	9.2 million
	No. of beneficiaries	1049
	Area promoted	1803 Ha
GIFT	Total number of seed/brood-fry supplied	All male seed: 43.65 million Brood-fry: 51,728 nos.
	No. of beneficiaries	531
	Area promoted	1778.5 Ha
Artemia	Artemia biomass & Cyst supplied	Biomass: 7834 Kg Cysts: 2,762 Tins
	No. of beneficiaries	569

Source: RGCA Activities document shared on 11 Aug 2023

Respondents have purchased seeds of GIFT Tilapia, Pearlsport, Mudcrab and Seabass. The demand for Mudcrab seeds in the east coast is higher than the present supply. Main challenges in commercial adoption include timely availability and sufficient quantity of seeds for culture and relatively lower market price compared to shrimps. Respondents wanted more technical guidance from RCGA for commercial adoption. RCGA has also signed MoU with state Governments and private entrepreneurs on transfer of technology for establishment of hatcheries for diversified species.











5.3 Problems/Hurdles in the implementation of the Scheme

Common challenges found in the implementation of the scheme are related to securing supporting documents, processing time of application and engagement frequency with the beneficiaries.

- Delay in allocating funds for disbursement to beneficiaries for the SFC period.
- Documents to be sourced from multiple departments from the state government and local body which delays the collection of documents to be submitted for availing financial assistance.
- New exporters require more hand holding in terms of presenting the required documents and invoices in the prescribed formats. For some of them this has led to lapsing of the extended period of the advance approval. They also require support in being referred to reliable buyers to avoid changes in the quotation post receipt of advance approval.
- Large number of documents to be verified especially for financial assistance causing delay in processing applications with limited manpower at the Head office and field offices.
- Online portal is not user-friendly to help officials verify and validate documents and invoices.
- Application forms are not in local or regional language making applicants dependent on MPEDA officials to clarify and complete the application.
- Lack of a monitoring and decision-making tool for the MPEDA officials to track the progress of scheme disbursements and other performance metrics or deliverables.
- The structure of MPEDA is functionally organized into administrative sections, there is limited formal flow of information and data among the sections leading to the schemes and programs being implemented as a standalone activity.

5.4 Analysis of user friendliness of online portal

Based on heuristic evaluation framework, e-mpeda portal was assessed for its user-friendliness.

Heuristic		Gap Identified	Recommendation
Visibility			
Show system status and tell what's happening	 1	As the page loads or when a task is being executed, there is no indication to the user that the portal is functioning well.	Feature needs to be provided to indicate the running status when tasks are being executed.
Freedom			
Provide good defaults and undo	 2	Users cannot undo or edit any data entered like the shrimp size	Provide functionality to edit calculation and a confirmation pop-up before submission.
Error Prevention			
Help users avoid making mistakes	 1	There is little indication of errors made while entering data. There is minimal validation of data entered.	Provide validation checks for each of the important data fields.
Flexibility			
Make advanced tasks fluid and efficient	 3	None	
Error Recovery			
Help users recognize, diagnose, and recover from errors	 1	There is no scope for user to correct any entry. They are required to reach out to MPEDA officials to make changes.	Provide features like draft or preview for each module and sub-module. Can provide examples near the field to help users make correct entry.
Mapping			
Use familiar metaphors and language	 3	None	
Consistency			
Use the same language and interface throughout	 3	None	
Recognition			
Make information easy to discover	 1	The navigation of the portal is not intuitive for the users. They are expected to recall the way they previously used the portal rather than providing an easy way to recognise.	Information architecture and navigation of the portal and different modules need to be reorganised.
Minimalism			
Provide only necessary information in an elegant way	 3	None	
Help			
Use proactive and in-place hints to guide users	 1	No product design document available	Need to create a complete and updated technical document for the portal and a user manual for easy onboarding. Sample user manual: https://coo.dgft.gov.in/manuals/Exporter-Manual.pdf
Total Score	60%		

Portal related Issues reported by beneficiaries:




- Network issues
- Server issues
- File size limit to upload not sufficient.


New feature requests from beneficiaries

- Dashboard view
- Eligible schemes and programs to be alerted on the portal itself.
- MPEDA wallet facility so that money can be deposited in bulk and consumed as per need and avoiding the hassle of OTP for each transaction.
- Improve browser compatibility.

5.5 Key takeaways

The key takeaways from the beneficiary survey have been summarised below as:

 <p>Relevance</p>	<ul style="list-style-type: none"> • Financial Assistance Schemes were aligned with the beneficiary needs, market demands and global value chain of fisheries and aquaculture. • 100% of respondents have reported that the scheme was crucial for development in marine products exports.
 <p>Efficiency</p>	<ul style="list-style-type: none"> • The e-mpeda portal has a score of 60% on user-friendliness assessed based on heuristic evaluation which leads to sub-optimal performance. • Only 30-35% respondents found the online application easy to use. • About 50% of the respondents found the assistance amount adequate. • 70% of the respondents who participated in international fairs found support extended by MPEDA adequate. • 100% of respondents found the MPEDA officials supportive and responsive.
 <p>Effectiveness</p>	<ul style="list-style-type: none"> • Respondents of financial assistance scheme have reported an increase in productivity and turnover. Monitoring beyond the obligation period to capture the long-term impact is not available.

	<ul style="list-style-type: none"> • 100% of respondents have reported that online portal provided a faster turnaround (less than one day) for export facilitation certificates. • 20% of beneficiaries reported an increase in exports after attending international fairs. • 100% of beneficiaries found prospective buyers while participating in the international fairs. • Less than 5% of the respondents utilised MPEDA lab services on need basis. Beneficiaries found the MPEDA lab testing services reliable and timely. • Low conversion of beneficiaries adopting value-added products or processes after MPEDA training due to multiple factors • 100% of respondents found mini lab set up with MPEDA's financial assistance useful. • Respondents reported a limited price realization due to cluster formation. • 100% of the respondents found the training material and quality of trainers adequate and relevant. • Online portal is transactional and does not allow for continuous engagement of beneficiaries.
 <p>Sustainability</p>	<ul style="list-style-type: none"> • Respondents of financial assistance scheme for value-added products and mini labs continue to use the infrastructure for furthering exports. • Training programs helped create awareness, but the rate of adoption is slow due to cost-benefit reasons. • Portal for availing export facilitation certificates was reported to be useful and user-friendly leading to higher adoption rate. • Farming clusters were unable to leverage the complete benefits due to low bargaining power. • Technical documentation for all modules of e-mpeda portal not available. Change requests and updates done over email does not allow monitoring and learning of the portal utilisation. • Awareness about the schemes and services of MPEDA is person-driven and nature of benefit realised.



CHAPTER 6
RECOMMENDATIONS

6 Recommendations

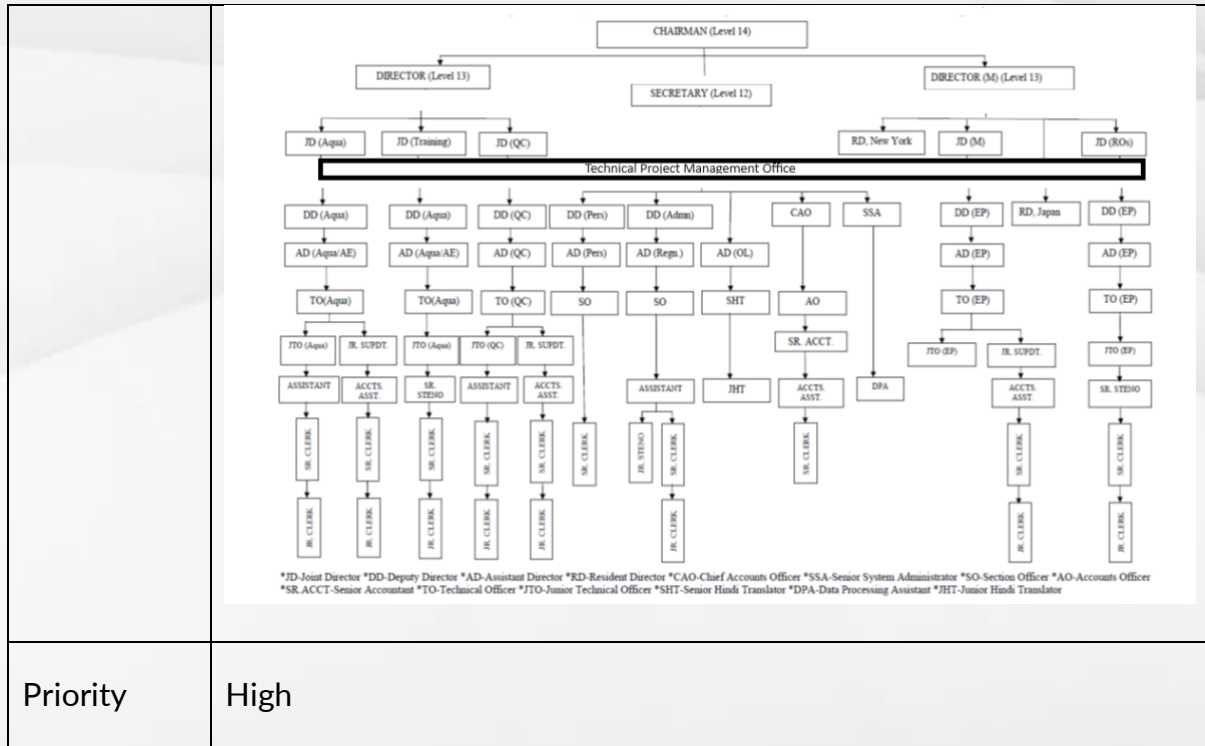
The recommendations have been structured on four levels – (1) Strategic; (2) System and Process; (3) Scheme-level and (4) Ecosystem Initiatives.

6.1 Strategic

6.1.1 Establish a Technical Project Management Office (TPMO)

Context	<ul style="list-style-type: none"> • The structure of MPEDA is functionally organized into administrative sections, there is limited formal flow of information and data among the sections leading to the schemes and programs being implemented as a standalone activity. • From beneficiary perspective, the role of MPEDA is seen as administrator of financial benefits than technical agency leading to reduced stickiness with beneficiaries and may lead to marginalization of MPEDA role in the future.
Action Points	<ul style="list-style-type: none"> • Establish cross-functional Technical Project Management Office (TPMO) to ensure alignment of goals • Rebranding of MPEDA as techno-commercial agency from beneficiary perspective • TPMO will operate on Mission Mode with clearly defined outcomes linking organisational goals with functional goals - Balanced score card. • Build evidence-based outcome templates. • Design and develop impact dashboard. <p>Technical PMO will support the top management in:</p> <ul style="list-style-type: none"> ▪ Prioritization of projects and ideas ▪ Distribution of strategic information ▪ Strategic alignment of projects and ideas ▪ Cost-benefit analyses of projects and ideas ▪ Check for achieved strategic contribution

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Priority

High

6.1.2 Establish a Marine Sector Skill Council

Context	<ul style="list-style-type: none"> • There is no formal institutional structure to focus on skill development of the entire skill pyramid of the marine industry. • Fisheries and aquaculture support about 2.8 crore fishers – 2.3 crore inland fishers and 49 lakh marine fishers¹². There are 1,515 exporters registered with MPEDA. There are 613 processing plants; 271 handling centres; 787 storage facilities¹³ in Marine export industry required varying degrees of skill requirement.
Action Points	<ul style="list-style-type: none"> • Establish Marine Export Sector Skill Council in association with NSDC. • Act as nodal agency for certification and accreditation for vocational training program in marine and aquaculture sector on export related activities. • Develop functional and occupational mapping, prepare National Occupational Standards (NOS) and Qualification Packs, Roll-out RPL and Short-term training program in association with training partners. • Converge all the current training initiatives of MPEDA under the Marine Sector Skill Council <p>Advantages:</p> <ul style="list-style-type: none"> • Build a self-sustaining training ecosystem in marine products export sector. • Convergence of existing MPEDA training programme under the Marine Sector Skill Council (MSSC) • Develop market driven training programs for exporters on value addition, market regulations etc. • Increased access to training program for fishers through PMKVY RPL programs • Access to funding through donors, CSR and PMKVY schemes, which is a major constraint right now due to reduced budgetary support.
Priority	High

¹² Handbook on Fisheries Statistics 2020, Government of India

¹³ MPEDA Annual Report 2019-20

6.1.3 MPEDA as Unified Authority for Export Facilitation

<p>Context</p>	<p>World seafood trade is to the tune of USD 190 billion¹⁴, of which trade of value-added products under Harmonised System (HS) Code Chapter 16 is worth USD 34.6 million. India's share in global trade of value-added products export is only 2.5% i.e., USD 0.86 million. India's competitors in global seafood trade, China, Vietnam, Thailand etc are forerunners in the trade of value-added marine products. As against India's miniscule share of 2.5%, China, the hub for reprocessing and value addition industry in the world holds share of 28.5 % of global value-added marine products trade under Chapter 16, followed by Thailand at 11.01% and Vietnam at 8.24%.</p> <p>In the context of Indian seafood industry, owing to issues related to non-availability of sufficient raw material, Indian processors are currently able to be utilize only 25-30% of the installed capacity, which is tuned to the peak harvest season.</p> <p>Given this background, India can be positioned as global hub for value addition. To unlock this opportunity, several process related bottlenecks needs to be addressed such as:</p> <ol style="list-style-type: none"> 1. Lead time in issuing Sanitary Import Permit (SIP) and Specific Pathogen Free (SPF) certificate and involvement of multiple agencies in the clearance process <ol style="list-style-type: none"> a. The major seafood importing countries like US, EU, and Japan are not insisting/issuing SPF certificate for import and export of seafood consignment. b. Notified ports in India does not have the laboratory facilities for testing the World Organisation for Animal Health (WOAH), listed pathogens and chemicals in the imported fishery products. The samples taken by FSSAI/AQCS are sent to the outside designated laboratory for testing. Once FSSAI/AQCS issues a No-Objection Certificate (NOC), EIA takes the sample again & tests all the parameters. The consignment is allowed to be processed only after the sample passes the EIA test.
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¹⁴ Source: MPEDA

	<p>2. Lead-time in issuance of NOC from Customs & DGFT for Advance Authorization</p> <p>a. The lead-time ranges from 15 to 25 days in advance authorization</p> <p>MPEDA was formed in 1972. However, the powers to certify fish & fishery products for export is still vested with EIC, which deals with multiple commodities. This requires exporters to interface with more than one entity for export facilitation.</p>
<p>Action Points</p>	<ul style="list-style-type: none"> ▪ MPEDA may be designated as an authorized agency for single window clearance for import of raw material for re processing and export of value-added seafood products. MPEDA would facilitate export of fish and fishery in line with the regulatory functions of APEDA & Spices Board. ▪ MPEDA may be delegated power as a single agency for collection of sample and testing for clearance for import of marine product raw material for reprocessing and export to reduce lead-time in getting NOC from FSSAI and EIC ▪ Include import of marine products for value addition and export under Foreign Trade Policy as a chapter to provide exclusive focus on marine products. ▪ Leverage the Manufacturing and Other Operations in Warehouse (MOOWR) scheme for import of raw materials to reduce delay clearing customs. <p>Advantages:</p> <ul style="list-style-type: none"> ▪ Ease of doing business for marine exporters ▪ Increased value addition of imported raw materials ▪ Single point of control for import and export of marine products ▪ Assigning fish and fishery product certification for exports to MPEDA will help the industry and significantly improve the ease of doing business by offering a single window service to the stakeholders.
<p>Priority</p>	<p>High</p>

6.2 Scheme-level

6.2.1 Demand driven budgetary support to value addition schemes

<p>Context</p>	<ul style="list-style-type: none"> • 40 applications worth INR 99 crore (backlog) were pending due to non-availability of funds and change in scheme components. Anticipating fund support from MPEDA, entrepreneurs established the facility utilizing institutional finance. • The process of availing scheme benefits specifically value addition require significant effort in collecting various documents from local authorities leading to 6 months to 15 months leading to beneficiary missing out on the scheme benefits due to scheme construct and or non-availability of funds for disbursement.
<p>Action Points</p>	<ul style="list-style-type: none"> • Planning and implementation period scheme may be extended to include the time required for beneficiary preparedness and application process time. <ul style="list-style-type: none"> ○ First 12 months (1st year) - market assessment of proposed scheme construct ○ 12 months to 48 months (3 year) – scheme implementation period ○ 48 months to 54 months (6 months) – scheme transition period (cooling period) before migrating to next plan period • Conduct demand assessment before the planning period combining the pending applications and expected demand for the scheme based on market feedback. • Appraise and prepare the beneficiaries for the impending change in market demands and scheme construct during cooling period as outlined above. • Create a strategic roadmap to help beneficiaries who applied for the schemes but haven't received the assistance to transition smoothly into another scheme if available or engage continuously to support them technically. For this, additional fund support may be extended to MPEDA. <p>Advantages:</p> <ul style="list-style-type: none"> • Accurate estimation of demand off-take for various scheme components with clearly defined outcomes.

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	<ul style="list-style-type: none">• Adaptive scheme implementation approach to accommodate implementation challenges at state level.• Leverage training programs as lead generators for different financial assistance schemes and technical guidance converting training to production line.• Help reduce the mismatch in expectations between beneficiaries and MPEDA
Priority	High

6.2.2 Delegation of authority for evaluation of scheme proposals to RD

Context	<ul style="list-style-type: none"> • During the evaluation period, the scheme related proposals from exporters and farmers move from Sub-Regional Division (SRD) to Regional Division (RD) to HQ through iterative evaluation process leading to multiple review and validation at different levels causing significant duplication of evaluation process. • At present, the e-mpeda portal is only 60% effective in delivering online evaluation process leading to physical movement of documents to HQ, multiple validation, and scrutiny of documents along the administrative chain leading to delay and bandwidth constraint at all levels.
Action Points	<ul style="list-style-type: none"> • Modalities of delegation of power to be decided by committee. • Redesign of portal to support online evaluation of proposals submitted by exporters and farmers. • Decentralized document evaluation at zonal level may be established to ensure process compliance before the final decision can be taken at appropriate level.
Priority	High

6.3 System and Process

6.3.1 Augmenting human resources for effective functioning of MPEDA

Context	<ul style="list-style-type: none"> • The total sanctioned strength of MPEDA has been revised from 420 to 250 combining the Head Office and Field Offices based on the restructuring proposal of the Ministry of Commerce and Industry. • At present, the number of resources in position is only 181 including 11 officials on deputation. The existing staff is not adequate to meet the growth objective of the sector. • There are 66 vacant posts for technical positions in aquaculture, export promotion and quality control.
Action Points	<ul style="list-style-type: none"> • Approval to the restructuring proposal of MPEDA and prioritize recruitment of all the vacant positions for better functioning of the authority to support the sector. • Make capacity building training of internal staff to enable them to take up cross-functional activities. • Training of personnel to focus on increased engagement with stakeholders that will encourage high-end or value-added exports. <p>Advantages:</p> <ul style="list-style-type: none"> • Building of a resilient team to deliver on the export target for India. • Skilled resources to manage the market demands.
Priority	High

6.3.2 Adoption of digital and artificial intelligence-based solutions

Context	<ul style="list-style-type: none"> • Reduced human resources is creating a burden in continuous engagement with relevant stakeholders • Existing digital solutions are under-utilized. There is no local language support in the existing e-mpeda portal that is driving engagement with all stakeholders for various schemes. • Social media is also under-utilized for market promotions.
Action Points	<ul style="list-style-type: none"> • Redesign the e-mpeda portal to make it user-friendly and inclusive in terms of offering regional or local language support. • Redesign MPEDA’s website as per Government of India Guidelines for Websites (GIGW) guidelines to improve user experience and cope up with market demands. • Provide interactive chatbot service to address common queries of stakeholders – schemes, trainings, source for seeds & feeds, etc. • Use e-mpeda portal to display critical input information for different stakeholders as a dashboard to push information automatically. • Use of blockchain technology in MPEDA’s traceability systems to verify details of farm registrations, consignment creation, lab testing, etc. • Build mobile apps for sharing market information for better marketing, tracking of applications and registrations. • Strengthen and automate data collection in the harbors. • Establish a dedicated team to manage MPEDA’s products and events on social media platforms like Twitter, Facebook, Instagram, etc. <p>Advantages:</p> <ul style="list-style-type: none"> • Improved and reliability in traceability systems. • Help bridge the gap between supply and demand for export. <p>Areas of digital interventions:</p> <ul style="list-style-type: none"> • Decision support systems for top management • AI-based chat bot for addressing day-to-day queries from exporters.

	<ul style="list-style-type: none">• Knowledge management of organizational processes, initiatives, and market level intelligence• Registration of farmers and exporters for continuous engagement.
Priority	Medium

6.4 Ecosystem Initiatives

To improve the efficiency and effectiveness of central sector schemes, the following recommendations are outlined below:

6.4.1 NaCSA to facilitate incubation of FPOs for aquaculture farmers

Context	<ul style="list-style-type: none"> NaCSA is working towards making Aquaculture Sustainable activity to improve livelihoods of Coastal villagers, with a “Self Help Group” approach to address market concerns through convergence of various Stakeholders and move towards formation of societies and educated them on better management practices (BMP) for safe and sustainable shrimp farming. NaCSA also trained these farmer societies to follow cluster approach in shrimp farming. While the above process helped farmers from capacity building perspective, the bargaining power of farmers continue to be challenge from supply and demand perspective
Action Points	<ul style="list-style-type: none"> Help farmers to form FPOs to ensure better alignment of supply and demand side and create a self-sustaining model. At present, around 2773 FPOs are registered under the Central Sector Scheme for Formation and Promotion of 10,000 FPOs by Small Farmers Agri-Business Consortium as on 23-08-2023¹⁵. <p>Advantages:</p> <ul style="list-style-type: none"> Institutional access to finance e.g., Producer Organisation Development Fund Convergence of central and state schemes and facilitate scaling up of FPOs
Priority	Medium

¹⁵ Source: SFAC, Govt of India

6.4.2 Tie-up with Credit Guarantee Trust for Micro and Small Enterprises

Context	<ul style="list-style-type: none"> • The beneficiaries have expressed satisfaction with MPEDA schemes construct. Their limited access to credit constrains the beneficiaries from availing the schemes in large-scale leaving the assigned funds under-utilized.
Action Points	<ul style="list-style-type: none"> • To address last mile credit delivery, MPEDA may consider tie-up with CGTMSE for collateral free loan through eligible financial institutions. <ul style="list-style-type: none"> ○ At present, the credit guarantee covers up to a loan amount Rs. 2 crore. ○ Up to Rs. 1 crore, maximum credit guarantee cover available is 85% of project loan with ceiling of Rs. 85 lakh. ○ Above Rs.1 crore and up to Rs. 2 crore, credit guarantee cover available is 75% of project loan with a maximum ceiling of Rs. 1.50 crores ○ For project loan of more than Rs. 2 crore, credit guarantee cover will be limited maximum up to Rs. 2 crore only. • The eligible projects under the CGTMSE include – Agricultural input and output services, infrastructure development, value addition, seed production, seed bank and processing units etc.,
Priority	Medium

6.4.3 Augment revenue through fee-based data and research support

Context	<ul style="list-style-type: none"> • MPEDA has 3 major divisions viz Aquaculture, Quality Control & Marketing, apart from this, MPEDA has functioning three Societies viz (i) Rajiv Gandhi Centre for Aquaculture (RGCA), the research and development arm of MPEDA (ii) Network for Fish Quality Management and Sustainable Fishing (NETFISH), the extension arm of MPEDA stands for improving the quality of fishery products exported from the country and the sustainability of fishery resources as well and (iii) National Centre for Sustainable Aquaculture (NaCSA) which provide technical support to the primary aquaculture societies ad build capacity among small farmers to produce quality shrimps in a sustainable manner. • Over the years, MPEDA has built a strong technical and market intelligence knowledge on the marine export development value chain. The data, information and best practices can be leveraged for offering value added services to marine exporter.
Action Points	<ul style="list-style-type: none"> • Establish technical consulting and research wing to provide support to marine exporters in the area of process automation, market intelligence and trade related reports.
Priority	Medium

6.4.4 Expansion of Market Promotion Activities

Context	<ul style="list-style-type: none"> • MPEDA participates in international fairs along with exporters as co-exhibitors. Usually, Indian participation is prominent in 4 major and 4 minor fairs each year. New international fairs targeted include Global Fishery Forum and Seafood Expo in Russia, and Vietfish in Vietnam. • Buyer Seller Meets are also organised to help expand the market and buyer space for Indian marine products. • Since 2013-14, Indian seafood products were exported to 27 new markets. Indian exporters are lagging behind Vietnam and Thailand in the value-added products segment in the existing markets. • It is important to build a new strategy to not only expand Indian presence in the existing markets but also venture into new markets in order to achieve the INR 1 lakh crore target for 2024-25.
Action Points	<ul style="list-style-type: none"> • Segment the nature of engagement with exporters into two - (1) Exposure and (2) Expansion. Exposure based engagement would be for newly established and small exporters to have a visibility in the international market and Expansion based engagement would be for experienced and large exporters to broaden their marketing horizon. • Expand Buyer-Seller Meets into Virtual Buyer-Seller meets, and Reverse Buyer-Seller meets (by bringing potential buyers to India to engage with Indian exporters). • When participating in international fairs, strategize on displaying those products that aligns to greater demand in targeted markets. MPEDA can liaison and ensure follow-up engagement with potential buyers and Indian exporters identified during these fairs.
Priority	Medium

A person is standing on a sandy beach at dusk, holding a net. The scene is framed by a large, glowing cyan circle. Several other circles of varying sizes and colors (light blue, white, and cyan) are scattered around the main circle. The background is a dark, blue sky over the ocean.

CHAPTER 7
CONCLUSION

7 Conclusion

The MPEDA Central Sector Scheme has played an important role in facilitating marine exports from India. In other words, the scheme acts as an avenue to increase value addition, facilitate market promotion for exporters, establish quality standards, incubate aquaculture technology for species diversification, facilitate capacity building of aquaculture farmers and exporters, and help in export traceability of wild caught & farmed products. The study proposes number of initiatives for improving scheme relevance, efficiency, effectiveness, sustainability and its impact. The path of implementation would however call for some bold and pragmatic approach to ensure effective implementation. Given this background, the scheme has thus acted as a catalyst and impacted beneficiaries through various initiatives.

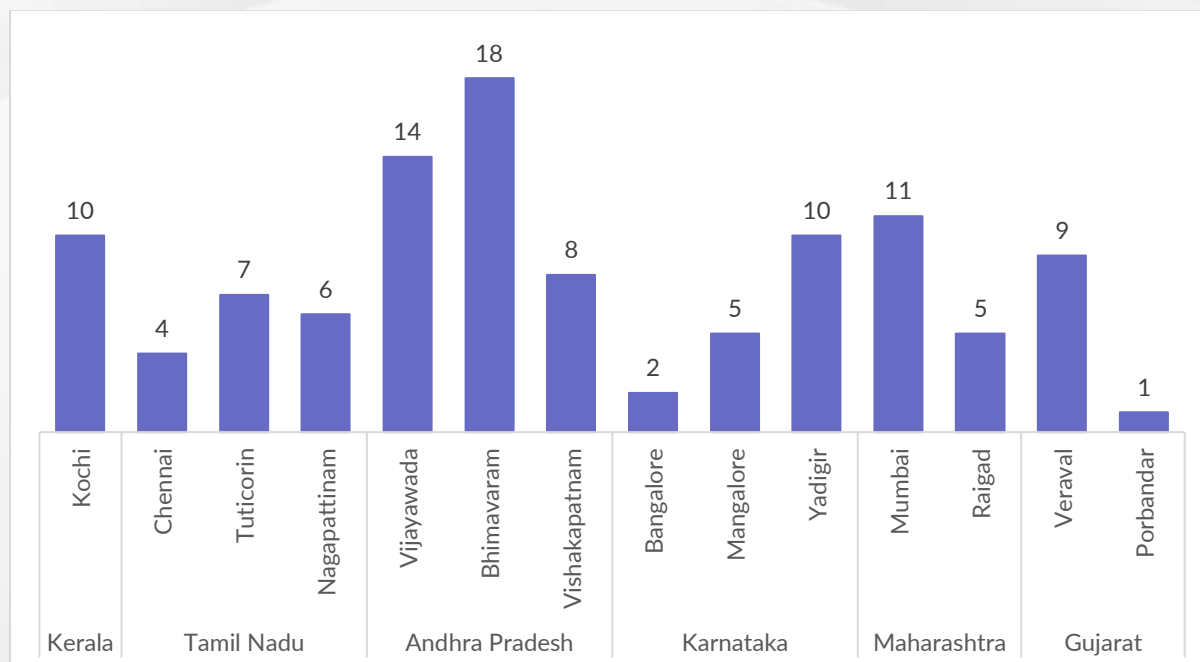


CHAPTER 8
APPENDICES

8 Appendices

8.1 Appendix A: Respondent beneficiaries

Figure 17: Geographical distribution of respondents (exporters and aquaculture farmers)



Source: Primary survey

8.2 Appendix B: Details of Visit

#	Designation/Section
1	Head Office, Kochi <ul style="list-style-type: none"> - The Chairman - The Director - Secretary - Jt Director (QC) - Jt. Director (Mktg) - Joint Director (Training) - Dy. Director (MS) - Dy. Director (DEV) - Chief Accounts Officer - Systems Analyst (Retd)

#	Designation/Section
	<ul style="list-style-type: none"> - Dy. Director (Lab) - Dy. Director (QC) - Dy. Director (Aqua) - Deputy Director (Admn.) - Dy Director (Pers) - Asst. Director (Coord & Regn) - Asst. Director (Stat.) - Asst. Director (MS) - CEO (NETFISH) - Market Promotions - RGCA
2	RD Kochi <ul style="list-style-type: none"> - Dy. Director - State Coordinator, Kochi – NETFISH
3	RD Vijayawada <ul style="list-style-type: none"> - Jt. Director - State Coordinator, NETFISH
4	SRD Bhimavaram <ul style="list-style-type: none"> - Asst Director - NETFISH - NaCSA - QC lab
5	SRD Vishakapatnam <ul style="list-style-type: none"> - Dy. Director - NETFISH - CIFT - NIPHATT
6	RD Mangalore <ul style="list-style-type: none"> - Asst Director

#	Designation/Section
7	RD Mumbai - Dy. Director - NETFISH
8	RD Chennai - Dy. Director - Asst Director
9	SRD Nagapattinam - Dy. Director
10	SRD Tuticorin - Dy. Director
11	SRD Veraval - Dy. Director

8.3 Appendix C: Details of human resources & vacancies in MPEDA

The details of posts and vacancies in MPEDA based on the restructuring proposal with the Ministry of Commerce and Industry has been detailed below.

Group	Present Sanction	Proposed As per Restructure	Agreed As per Restructure	Total (MIP including deputation)	Vacancy As per restructure
A	87	81	81	59	22
B	133	124	86	55*	33
C	200	45	45	67*	9
Total	420	250	212**	181	64

* Including supernumerary posts

**Excluding 38 new posts creation

Source: Data received from Personnel Section, MPEDA on 05 Oct 2023

8.4 Appendix D: Questionnaire

Exporters

A. Instruction to the interviewer

- The interviewer must start with his/her introduction and the nature of the work done by the organization.
- Orient the respondent about the consent for the interview and share the correct estimated time required for this discussion and then initiate the discussion guided by the questionnaire.
- In the case of qualitative data collection, it is not necessary to follow the guide in sequential order; the discussion can be guided basis answers from the respondent, ensuring the areas of inquiry are covered overall. However, in the case of structured questions of quantitative questionnaires, the given order of questions is to be followed. To adopt this method, please read the guide properly and understand the sections and questions very clearly. Practice as much as possible before collecting data.
- This research questionnaire (both quantitative and qualitative) will cover the beneficiaries identified by the MPEDA field offices (Regional Division or Sub-Regional Division) only.
- Please ensure that the interview is held within the premises of the MPEDA field office (Regional Division or Sub-Regional Division).
- In case beneficiaries are not available on the day of visit of team, the questionnaire may be administered through virtual meeting or over a call.

B. Introduction and Consent for the Interview

Hello Sir/Madam! My name is ----- and I am working as a researcher with Athena Infonomics India Pvt. Ltd.

As you would be aware, the Central Sector Scheme of Marine Products Export Development Authority (MPEDA) a flagship initiative of the Government of India to promote exports of marine products in the country. MPEDA offers various schemes like financial assistance to support high-end or value-added products, financial assistance to move towards certification for primary production, financial assistance to set up Mini Labs, Training through different divisions and societies, Laboratory services, Certifications for traceability and Assistance for technology incubation.

For a systematic and comprehensive review, MPEDA has engaged Athena Infonomics India Pvt. Ltd. to assess the Central Sector Scheme of MPEDA. The objective of the assessment is to (i) Evaluate the performance/effectiveness of the scheme; (ii) Assess the impact of the scheme; (iii) Identify the challenges in the implementation of the scheme; (iv) Evaluate the need and effectiveness of trainings; (v) Assess the ease of applying to the scheme and (vi) User-friendliness of the online portal of MPEDA.

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The selection of beneficiaries is random, and you have been selected for this interview as your role has been important in the implementation of this scheme and your experience would be relevant to strengthening the scheme and organization.

You may feel free to ask me any questions related to the study. Thank you for your support. Now we can start our discussion.

Beneficiary: MPEDA-Registered Processing or Handling Units for Exports

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview (DD/MM/YY)	
3.	Permission for interview granted.	(1) Yes (2) No
4.	The place of Interview	(1) Within the premise of Field Office (2) Other/community
5.	Respondent Name	
6.	Name of Handling Centre	
7.	Address of Handling Centre	
8.	District name	
9.	State name	

Business Profile

S No.	Particulars	Response
1.	For how many years have you been in the business of marine products?	
2.	Are you a first-generation entrepreneur?	(1) Yes (2) No
3.	In which year did you start this Handling Centre/Processing Unit?	
4.	Number of Processing Plants	
5.	What marine products do you export?	
6.	Which is your export market? (You may select more than one option)	<input type="checkbox"/> USA <input type="checkbox"/> EU <input type="checkbox"/> Japan <input type="checkbox"/> Other: _____

Are you a beneficiary of

- Financial Assistance to support for Value Added Products
- Participant in International Seafood Fairs or Buyer-Seller Meets
- Financial Assistance for Mini Labs
- HACCP Training
- Value-Add Training
- Aailed Export Facilitation Certificates
- Aailed QC services of MPEDA

Scheme: Financial Assistance to support high end or innovative value addition

The scope of the Scheme is to help with Existing Units who wish to switch over their production to Specific Value-Added Products and also to new entrepreneurs venturing into the seafood trade for the production and exports of VAPs. Machinery and equipment's for the production of cooked/blanched products, AFD products, Surimi based products etc. for Value Addition, machinery such as IQF with Cooking line, Glazing, Blanching, Boiler, Vacuum packing, battering and breadng line, advance packing equipment's etc. will be considered for assistance.

S No.	Particulars	Response
1.	When did you receive Advance Approval?	MM/YYYY
2.	When did you receive Final Approval?	MM/YYYY

Awareness

S No.	Particulars	Response
1.	How did you come to know about the scheme?	(1) Friends (2) Newspaper/Advertisement (3) Fishing/Aquaculture Society (4) Local Associations. Name_____
2.	How did you access the scheme information?	(1) Through MPEDA Head Office (2) Through MPEDA RD Office (3) Through MPEDA SRD Office (4) Online (5) Friends/Community

Ease of Application

S No.	Particulars	Response
1.	How did you fill out your application?	(1) Physical Application Form (2) Online Application
2.	Did you find the online application process for financial assistance user-friendly?	(1) Yes (2) No
3.	Who filled out your application?	(1) Myself (2) Family/Friends (3) MPEDA officials

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

S No.	Particulars	Response
		(4) Consultants - Individual or Firm..... (5) Others: ____
4.	Were the details requested in the application form easy to understand?	(1) Yes (2) No
5.	If No was selected, what was the challenge?	<i>Text</i>
6.	How many days did it take for you to complete your application?	
7.	Which document(s) were the most difficult to collect?	
8.	Who helped you clarify at different stages of the application process?	(1) Friends/Family (2) MPEDA Officials (3) Others: ____

Outcome

S No.	Particulars	Response
1.	What is the export value (year-on-year) since the receipt of assistance from MPEDA? (Mention in INR)	<input type="checkbox"/> 2019: ____ <input type="checkbox"/> 2020: ____ <input type="checkbox"/> 2021: ____ <input type="checkbox"/> 2022: ____
2.	For what purpose did you utilize the assistance from MPEDA?	<input type="checkbox"/> Value-Added Products <input type="checkbox"/> Equipment & Machinery <input type="checkbox"/> Infrastructure modification
3.	How critical was the assistance in the export activities of your unit?	(1) I would not have exported without this assistance. (2) I had an alternate plan in place if I had not received approval. If so, please indicate _____
4.	Have you implemented high-end or innovative value addition processes	(1) Yes (2) No (3) In process

Satisfaction

S No.	Particulars	Response
1.	On a scale of 1-5, how would you rate your experience with this scheme? Experience includes application process, interaction with officials, updates, and financial assistance.	(1) Bad (2) Needs Improvement (3) Average (4) Good (5) Excellent
2.	Was the financial assistance sufficient for your business needs?	(1) Yes (2) No
3.	If No was selected, how much assistance would you think be sufficient? Why?	<i>Text</i>

S No.	Particulars	Response
4.	How useful was the Advance Approval Letter?	(1) Helped me secure bank loan (2) Helped me purchase necessary products faster (3) No utility (4) Others: _____
5.	Which aspect of the Scheme would you improve this scheme?	(1) Ease of filling up application (2) Tracking of application status (3) MPEDA's support or guidance for queries related to supporting documents (4) Increase in assistance amount (5) Others: _____
6.	Are you accessing any other scheme for marine products exports?	(1) Yes (2) No
7.	If (1) Yes was selected, name the scheme and purpose.	Name of scheme: _____ Purpose: _____

Export Facilitation Certificates for export traceability

To facilitate exports, MPEDA issues export facilitation certificates to exporters to help them ship their consignment to export markets such as European Union, United States, Chile and others. Such certificates include Catch Certificate, DS-2031 certificate, ICCAT certificate, Certificate of Legal Origin and Certificate of Origin.

S No.	Particulars	Response
1.	What marine products do you export?	
2.	Which export certificate did you apply for? <i>Select whichever is applicable.</i>	<input type="checkbox"/> Catch Certificate - EU <input type="checkbox"/> Catch Certificate - Non-EU <input type="checkbox"/> DS-2031 <input type="checkbox"/> ICCAT <input type="checkbox"/> Certificate of Legal Origin <input type="checkbox"/> Certificate of Origin <input type="checkbox"/> Others: _____
3.	Was there any difficulty in applying online for the export facilitation certificates?	(1) Yes (2) No
3A	If (1) Yes was selected, what difficulty did you face?	<i>Text</i>
4.	How much time does it take for you to get the certificate after applying? <i>Mention in number of hours</i>	
5.	How often do you apply for export certificate?	(1) Monthly (2) Quarterly

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S No.	Particulars	Response
		(3) Any other: _____
6.	Was the officer dealing with your application helpful and understanding?	(1) Yes (2) No
6A	If (2) No was selected, what difficulty did you face?	<i>Text</i>
7	Have you received their export facilitation certificates within the stipulated time?	(1) Yes (2) No
8	How satisfied were you with the quality of service?	(1) Very satisfied (2) Satisfied (3) Can be improved Please state your reason _____
9	Did you experience improved market acceptance and access due to export facilitation certificates?	(1) Yes (2) No

Market Promotion

MPEDA organizes participation of India in the major International Seafood Fairs and encourages participation of Indian seafood exporters. It helps Indian exporters showcase their products and interact with potential overseas buyers. Trade queries are also received from these fairs.

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview (DD/MM/YY)	
3.	Permission for interview granted.	(3) Yes (4) No
4.	The place of Interview	(3) Within the premise of Field Office (4) Other/community
5.	Respondent Name	
6.	District name	
7.	State name	

Awareness

S No.	Particulars	Response
1.	Have you attended any International Seafood Fairs?	(1) Yes (2) No

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

S No.	Particulars	Response
2.	If (1) Yes was selected, who organized your participation in the Fair?	(1) MPEDA (2) Self (3) Friends/Community (4) Others: ____
3.	If (2) No was selected, why did you not participate?	(1) Expensive to participate (2) Not useful (3) Others: ____
4.	How did you come to know about the International Fairs?	(1) Friends (2) MPEDA (3) Other exporters (indicate the name)_____ (4) Newspaper/Advertisement (5) Fishing/Aquaculture Society (6) Associations (7) Consultants (8) Other: _____
5.	How did you enrol for the Fair?	(1) Through MPEDA Head Office (2) Through MPEDA RD Office (3) Through MPEDA SRD Office (4) Online (5) Others: ____
6.	Did you have access to the trade queries or market leads from the International Fairs?	(1) Yes (2) No
7.	If (1) Yes was selected, how useful were the queries/leads?	(1) Got access to new buyers (2) Got access to new market (3) Others: ____
8.	If (2) No was selected, what was the challenge in accessing the information?	(1) Did not know that information was available (2) No assistance received on how to proceed further (3) Others: _____
9.	Have you got any market lead/orders obtained through the fair	(1) Yes (2) No If Yes, Elaborate on the market lead Export market: Product: Export Value
10.	Did you increase exports as a result of attending international fairs	(1) Yes (2) No
11.	Have you secured long-term contracts or partnerships through fair participation	(1) Yes (2) No If yes, please elaborate_____
12.	Are the fairs being participated in through MPEDA adequate?	(3) Yes (4) No

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S No.	Particulars	Response
13.	If (2) No was selected, what other support do you require?	Text
14.	How many times have you participated in the international seafood fairs?	Text
15.	Would you recommend international seafoods to others?	(1) Yes (2) No

Scheme: Training and Capacity Building

S No.	Particulars	Response
1.	Which training program did you participate?	(1) Value-Addition (2) HACCP
2.	How satisfied were you with the quality of training? <i>Quality of training refers to trainer's ability to engage with the audience, training environment and hands-on sessions.</i>	(4) Very satisfied (5) Satisfied (6) Can be improved
3.	If (3) Can be improved was selected, Please elaborate what improvements you wish to see.	(1) Engage with audience better (2) Use of local language (3) Training center facilities (4) More hands-on training (5) Others: _____
4.	Which aspects of the training material you were satisfied with? <i>Select all that apply</i>	<input type="checkbox"/> Very relevant content <input type="checkbox"/> Provided in local language <input type="checkbox"/> Easy and concise to read <input type="checkbox"/> Could apply to my work directly
5.	How would you rate the knowledge level of the trainer?	(1) Very knowledgeable – provided practical & relevant information & market-specific info, etc. (2) Good – helped learn something useful (3) Average
6.	What kind of trainer you are looking for?	(1) Indian experts (2) Foreign experts
7.	What other value-added products you would like to train your workforce on?	
8.	Was the training useful for you to develop a HACCP plan for your unit?	(1) Yes (2) No
9.	If (2) No was selected, What more information was required?	

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

10.	Did you get an updated knowledge of the regulatory requirements of major markets?	(1) Yes (2) No
11.	If (2) No was selected, What information you think was missing?	

Scheme: Financial Assistance for Mini Labs

The scheme is for providing financial assistance for the establishment of laboratory for microbial and chemical parameters of fishery products intended for export purpose in approved processing plant/ handling centre testing of fishery products.

S No.	Particulars	Response
1.	When did you receive Advance Approval?	MM/YYYY
2.	When did you receive Final Approval?	MM/YYYY

Awareness

S No.	Particulars	Response
1.	How did you come to know about the scheme?	(1) Friends (2) Newspaper/Advertisement (3) MPEDA (4) Fishing/Aquaculture Society (5) Associations (6) Banks (7) Consultants (8) Other: _____
2.	How did you access the scheme information?	(1) Through MPEDA Head Office (2) Through MPEDA RD Office (3) Through MPEDA SRD Office (4) Online (5) Friends/Community

Ease of Application

S No.	Particulars	Response
1.	How did you fill out your application?	(1) Physical Application Form (2) Online Application
2.	Who filled out your application?	(1) Myself (2) Family/Friends (3) MPEDA officials (4) Others: _____
3.	Were the details requested in the application form easy to understand?	(1) Yes (2) No
4.	If No was selected, what was the challenge?	Text
5.	How many days did it take for you to complete your application?	

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

6.	Which document(s) were the most difficult to collect?	
7.	Who helped you clarify at different stages of the application process?	(1) Friends/Family (2) MPEDA Officials (3) Others: _____

Outcome

S No.	Particulars	Response
1.	How many samples have been tested since availing assistance?	
2.	For what purpose did you utilize the assistance from MPEDA?	<input type="checkbox"/> Equipment <input type="checkbox"/> Media <input type="checkbox"/> Chemicals <input type="checkbox"/> Glassware <input type="checkbox"/> Furniture <input type="checkbox"/> Miscellaneous
3.	How critical was the assistance in the export activities of your unit?	(1) It reduced my dependency on external labs. (2) Helped me with HACCP compliance. (3) No impact.

Satisfaction

S No.	Particulars	Response
1.	On a scale of 1-5, how would you rate your experience with this scheme? Experience includes application process, interaction with officials, updates, and financial assistance.	(1) Bad (2) Needs Improvement (3) Average (4) Good (5) Excellent
2.	Was the financial assistance sufficient for your business needs?	(1) Yes (2) No
3.	If No was selected, how much assistance would you think be sufficient?	Text
4.	How useful was the Advance Approval Letter?	(1) Helped me secure bank loan (2) Helped me purchase necessary products faster (3) No utility (4) Others: _____
5.	Which aspect of the Scheme would you improve this scheme?	(1) Ease of filling up application (2) Tracking of application status (3) MPEDA's support or guidance for queries related to supporting documents

		(4) Increase in assistance amount (5) Others: _____
6.	Are you accessing any other scheme for marine products exports?	(1) Yes (2) No
7.	If (1) Yes was selected, name the scheme and purpose.	Name of scheme: _____ Purpose: _____

Aquaculture Farmers

Are you a beneficiary of

- Financial Assistance to Move Towards Certification
- Training for Aquaculture & Skill Development
- Lab services
- Technology incubation

Scheme: Financial Assistance under Certification of primary production

The Scheme aims to provide financial assistance for acquiring certification standards and infrastructure/equipment to produce quality seafood from aquaculture farms or hatcheries or feed mills or ornamental fish breeding units or rearing farms or export holding facilities. There are three sub-schemes: (1) Moving Towards Sustainability and Certification; (2) Second Party Certification and (3) Third Party Certification.

Beneficiary: Aquaculture farmers

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview (DD/MM/YY)	
3.	Permission for interview granted.	(1) Yes (2) No
4.	The place of Interview	(1) Within the premise of Field Office (2) Other/community
5.	Respondent Name	
6.	District name	
7.	State name	

Business Profile

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

S No.	Particulars	Response
1.	For how many years have you been in the business of aquaculture?	
2.	Are you a first-generation entrepreneur?	(1) Yes (2) No
3.	In which year did you start this farm?	
4.	What is the size of your farm? <i>Mention in acres</i>	
5.	Which species of shrimp do you culture?	(1) Black Tiger Shrimp (2) L. Vannamei (3) Scampi (4) Others: _____
6.	Which is your preferred export market? <i>You may select more than one option</i>	<input type="checkbox"/> USA <input type="checkbox"/> EU <input type="checkbox"/> Japan <input type="checkbox"/> Other: _____
7.	Have you improved market access and price realization due to cluster formation?	(1) Yes (2) No
8.	Where do you source seeds for your farm?	(1) Own hatchery (2) Nearby hatchery (3) Imported
9.	Where do you source feeds for your farm?	(1) Own feed mill (2) Nearby feed mill (3) Imported

S No.	Particulars	Response
1.	When did you receive Advance Approval?	MM/YYYY
2.	When did you receive Final Approval?	MM/YYYY

Awareness

S No.	Particulars	Response
1.	How did you come to know about the scheme?	(1) Friends (2) MPEDA (3) Newspaper/Advertisement (4) Fishing/Aquaculture Society (5) Associations (6) Banks (7) Consultants - Individual/Firm- ----- (indicate the name) (8) Other: _____
2.	How did you access the scheme information?	(1) Through MPEDA Head Office (2) Through MPEDA RD Office (3) Through MPEDA SRD Office

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

		(4) Online (5) Friends/Community
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Ease of Application

S No.	Particulars	Response
1.	How did you fill out your application?	(1) Physical Application Form (2) Online Application
2.	Who filled out your application?	(1) Myself (2) Family/Friends (3) MPEDA officials (4) Others: ____
3.	Were the details requested in the application form easy to understand?	(1) Yes (2) No
4.	If No was selected, what was the challenge?	<i>Text</i>
5.	How many days did it take for you to complete your application?	
6.	Which document(s) were the most difficult to collect?	
7.	Who helped you clarify at different stages of the application process?	(1) Friends/Family (2) MPEDA Officials (3) Others: ____

Outcome

S No.	Particulars	Response
1.	Do you export shrimps do you export?	(1) Yes (2) No
	If (2) No was selected, what challenges did you face?	
2.	What is the export value (year-on-year) since the receipt of assistance from MPEDA? (<i>Mention in INR</i>)	<input type="checkbox"/> 2019: ____ <input type="checkbox"/> 2020: ____ <input type="checkbox"/> 2021: ____ <input type="checkbox"/> 2022: ____
3.	For what purpose did you utilize the assistance from MPEDA?	<input type="checkbox"/> Crab fencing <input type="checkbox"/> Bird fencing <input type="checkbox"/> Hand dip and Foot dip <input type="checkbox"/> Sludge pump <input type="checkbox"/> Aerators/Blowers <input type="checkbox"/> Others
4.	Have you availed any of these assistances? <i>Select all that apply</i>	<input type="checkbox"/> Technical Assistance on Better Management Practices <input type="checkbox"/> Training and capacity building for adoption of sustainable practices <input type="checkbox"/> None

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

5.	How critical was the assistance in the export activities of your unit?	<ol style="list-style-type: none"> 1. I would not have exported without this assistance. 2. I had an alternate plan in place if I had not received approval.
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S No.	Particulars	Response
1.	On a scale of 1-5, how would you rate your experience with this scheme? Experience includes application process, interaction with officials, updates, and financial assistance.	<ol style="list-style-type: none"> (1) Bad (2) Needs Improvement (3) Average (4) Good (5) Excellent
2.	How often officials' visits to their farms?	text
3.	Are you happy with support extended by the local officials?	<ol style="list-style-type: none"> (1) Yes (2) No (3) Needs improvement Please elaborate your experience:
4.	Was the financial assistance sufficient for your business needs?	<ol style="list-style-type: none"> (4) Yes (5) No
2A	If No was selected, how much assistance would you think be sufficient?	Text
5.	How useful was the Advance Approval Letter?	<ol style="list-style-type: none"> (1) Helped me secure bank loan (2) Helped me purchase necessary products faster (3) No utility (4) Others: _____
6.	Which aspect of the Scheme would you improve this scheme?	<ol style="list-style-type: none"> (1) Ease of filling up application (2) Tracking of application status (3) MPEDA's support or guidance for queries related to supporting documents (4) Increase in assistance amount (5) Others: _____
7.	Are you accessing any other scheme for your farm or for exports?	<ol style="list-style-type: none"> (1) Yes (2) No
5A	If (1) Yes was selected, name the scheme and purpose.	Name of scheme: _____ Purpose: _____

Scheme: Technology Incubation for Aquaculture

S No.	Particulars	Response
1.	<p>What technology did you receive from RGCA?</p> <p><i>Select all that apply</i></p>	<input type="checkbox"/> GIFT seeds <input type="checkbox"/> Pearlsport/Etropolis Seeds <input type="checkbox"/> Seabass Seeds <input type="checkbox"/> Pompano <input type="checkbox"/> P. monodon <input type="checkbox"/> Fingerlings (FinFish) <input type="checkbox"/> Crablets/crab-instar <input type="checkbox"/> Artemia biomass & Cyst
2.	<p>Were the species promoted/technology transferred by RGCA as per the need of the sector?</p>	<ul style="list-style-type: none"> • Yes • No
3.	<p>If (2) No was selected, which species/technology you think should be included?</p>	<i>Text</i>
4.	<p>Did the technology transfer help diversify your aquaculture practice?</p>	<p>1. Yes</p> <p>2. No</p>
5.	<p>Did you receive timely technical assistance from RGCA?</p>	<p>(1) Yes</p> <p>(2) No</p>
6.	<p>If (2) No was selected, what was the concern?</p>	<i>Text</i>
7.	<p>What technical assistance did you receive from RGCA?</p>	<input type="checkbox"/> Hatchery technology <input type="checkbox"/> Laboratory services <input type="checkbox"/> Establishment/operation of Aquatic Quarantine Facility <input type="checkbox"/> Technology for production through Pre- and Post-Nursery stages <input type="checkbox"/> Others: _____
8.	<p>Were you satisfied with the technical assistance offered?</p>	<p>(1) Very satisfied</p> <p>(2) Satisfied</p> <p>(3) Can be improved</p>
9.	<p>If (3) Can be improved was selected, what can be improved?</p>	<i>Text</i>

Scheme: Services by MPEDA QC & ELISA labs

S No.	Particulars	Response
1.	Which lab services of MPEDA did you take up?	(1) ELISA Lab for Pre-Harvest Tests (2) QC Lab – Microbiology test (3) QC Lab – Chemical Test for fish and fish products (4) QC Lab – Chemical Test for water (5) QC Lab – Special package for aquaculture farm and hatcheries
2.	How often do you take the services of MPEDA labs?	(1) Weekly (2) Monthly (3) Quarterly (4) Any other: _____
3.	Have you used laboratory services apart from those offered by MPEDA?	(1) Yes (2) No
4.	If (1) Yes was selected, Please provide the name of the Laboratory.	Text
5.	Which aspects of MPEDA labs do you like?	(1) Responsive staff (2) Prompt update on test request and results (3) Reliable service – sample collection (4) Informed about non-compliant samples (5) Affordable Prices (6) Quick resolution of queries (7) Latest equipment (8) Others: _____
6.	Were there any delays in giving the test results?	(1) Yes (2) No
7.	If (1) Yes was selected, Please mention the extent of delay in number of days.	
8.	Which aspects of MPEDA labs you think would require improvement in comparison to other accredited labs?	<input type="checkbox"/> Staff <input type="checkbox"/> Promptness of test updates <input type="checkbox"/> Sample collection <input type="checkbox"/> Testing fee <input type="checkbox"/> Resolution of queries <input type="checkbox"/> Service reliability <input type="checkbox"/> Information on non-compliant samples <input type="checkbox"/> Equipment <input type="checkbox"/> Others: _____

NaCSA

A. Instruction to the interviewer

The interviewer must start with his/her introduction and organization work. Secure the consent of the respondents to participate in the Focus Group Discussion (FGD) and share the correct estimated time required for this discussion and then start a question-answer session with the help of this questionnaire/guide.

B. Introduction and Consent for the Interview

Hello Sir/Madam! My name is ----- and I am working as a researcher with Athena Infonomics India Pvt. Ltd.

As you would be aware, the Central Sector Scheme of Marine Products Export Development Authority (MPEDA) a flagship initiative of the Government of India to promote exports of marine products in the country. MPEDA offers various schemes like financial assistance to support high-end or value-added products, financial assistance to move towards certification for primary production, financial assistance to set up Mini Labs, Training through different divisions and societies, Laboratory services, Certifications for traceability and Assistance for technology incubation.

For a systematic and comprehensive review, MPEDA has engaged Athena Infonomics India Pvt. Ltd., New Delhi to assess the Central Sector Scheme of MPEDA for the SFC period, 2017-2020. The objective of the assessment is to (i) Evaluate the performance/effectiveness of the scheme; (ii) Assess the impact of the scheme; (iii) Identify the challenges in the implementation of the scheme; (iv) Evaluate the need and effectiveness of trainings; (v) Assess the ease of applying to the scheme and (vi) User-friendliness of the online portal of MPEDA.

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview	<i>DD/MM/YYYY</i>
3.	Permission for interview granted.	(1) Yes (2) No
	The place of Interview	(1) Within the premise of Field Office (2) Other/community
4.	Respondent Name	
5.	District name	
6.	State name	

Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

Business Profile

S No.	Particulars	Response
1.	For how many years have you been in the business of aquaculture?	
2.	Are you a first-generation entrepreneur?	(3) Yes (4) No
3.	In which year did you start this farm?	
4.	What is the size of your farm? <i>Mention in acres</i>	
5.	Which species of shrimp do you culture?	(5) Black Tiger Shrimp (6) L. Vannamei (7) Scampi (8) Others: _____
6.	Which is your preferred export market? <i>Select all that apply</i>	<input type="checkbox"/> USA <input type="checkbox"/> EU <input type="checkbox"/> Japan <input type="checkbox"/> Other: _____
7.	Where do you source seeds for your farm?	(4) Own hatchery (5) Nearby hatchery (6) Imported
8.	Where do you source feeds for your farm?	(4) Own feed mill (5) Nearby feed mill (6) Imported

S No.	Particulars	Response
1.	How did you come to know about NaCSA?	(1) Friends (2) Newspaper/Advertisement (3) Fishing/Aquaculture Society (4) Associations (5) Banks (6) Consultants (7) Others: _____
2.	What assistance have you received from NaCSA in improving your farming activities? <i>Select all that apply</i>	<input type="checkbox"/> Facilitated access to MPEDA financial assistance schemes <input type="checkbox"/> Technical support <input type="checkbox"/> Assistance in farm enrollment with MPEDA <input type="checkbox"/> Capacity building or training programs <input type="checkbox"/> Market information <input type="checkbox"/> Access to institutional finance and insurance

S No.	Particulars	Response
		<input type="checkbox"/> Facilitated linkage with Processors and Exporters <input type="checkbox"/> Helped obtain licenses from the Coastal Aquaculture Authority (CAA) <input type="checkbox"/> Others: _____
3.	What according to you are the benefits of being part of the cluster?	<input type="checkbox"/> Better Prices for input materials <input type="checkbox"/> Better market price for produce <input type="checkbox"/> Better access to markets <input type="checkbox"/> Others: _____ <input type="checkbox"/> No benefits
4.	How frequently do the NaCSA officials visit your farm?	(1) Weekly (2) Monthly (3) Quarterly (4) Half-yearly (5) Annually (6) Any other: _____
5.	What kind of support do you expect from NaCSA?	

Discussion Guide - Head Office/RD

Introduction and Consent for the Interview

Hello Sir/Madam! My name is ----- and I am working as a researcher with Athena Infonomics India Pvt. Ltd.

As you would be aware, the Central Sector Scheme of Marine Products Export Development Authority (MPEDA) a flagship initiative of the Government of India to promote exports of marine products in the country. MPEDA offers various schemes like financial assistance to support high-end or value-added products, financial assistance to move towards certification for primary production, financial assistance to set up Mini Labs, Training through different divisions and societies, Laboratory services, Certifications for traceability and Assistance for technology incubation.

For a systematic and comprehensive review, MPEDA has engaged Athena Infonomics India Pvt. Ltd., New Delhi to assess the Central Sector Scheme of MPEDA for the SFC period, 2017-2020. The objective of the assessment is to (i) Evaluate the performance/effectiveness of the scheme; (ii) Assess the impact of the scheme; (iii) Identify the challenges in the implementation of the scheme; (iv) Evaluate the need and effectiveness of trainings; (v) Assess the ease of applying to the scheme and (vi) User-friendliness of the online portal of MPEDA.

Development Section

S No.	Particulars	Response
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Evaluation and Impact Assessment of the Central Sector Scheme of MPEDA

1.	Name of interviewer	
2.	Date of interview	DD/MM/YYYY
3.	Permission for interview granted.	(1) Yes (2) No
4.	Respondent Name	
5.	Designation	
6.	District name	
7.	State name	

1. Please outline the process from application to final disbursement.?
2. How do you budget for the scheme?
3. How has the uptake of the financial assistance scheme for value-added have been?
4. Where do you face most challenges? (Prompt: Scheme awareness, documentation, etc.)
5. How long does it usually take to process applications related to financial assistance schemes – advance approval and final approval?
6. How many applications do you get annually for each scheme?
7. How is the uptake of online application? If the interviewee says there are challenges related to online application, probe further.
8. What challenges do you face with online applications?
9. How have you overcome some of these challenges?
10. What suggestions for improvements with regard to the schemes do you think would help?
11. What are the expectations of beneficiaries regarding the schemes and services offered by MPEDA? How do you manage the expectations?
12. How often do you interact with beneficiaries post disbursement?
13. What were the main concerns expressed by beneficiaries? (Either during your interaction or other modes?)
14. How do you address those concerns? Individual or regular meetings? If there are regular meetings, how often do you conduct such meetings?
15. How do you assess the impact of the scheme?

Aquaculture Section

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview	DD/MM/YYYY
3.	Permission for interview granted.	(1) Yes (2) No
4.	Respondent Name	
5.	Designation	
6.	District name	
7.	State name	

1. What is the process from application to final disbursement?
2. How do you budget for the scheme?
3. How has the uptake of the financial assistance scheme under Certification of primary production been?
4. Where do you face most challenges faced by beneficiaries? (Prompt: Scheme awareness, documentation, etc.)
5. How long does it usually take to process applications?
6. How many applications do you get annually for each scheme?
7. How is the uptake of online application? If the interviewee says there are challenges related to online application, probe further.
8. What challenges do you face with online applications?
9. How have you overcome some of these challenges?
10. What suggestions for improvements with regard to the schemes do you think would help?
11. What are the expectations of beneficiaries regarding the schemes and services offered by MPEDA? How do you manage the expectations?
12. How often do you interact with beneficiaries post disbursement?
13. What were the main concerns expressed by beneficiaries? (Either during your interaction or other modes?)
14. How do you address those concerns? Individual or regular meetings? If there are regular meetings, how often do you conduct such meetings?
15. How do you assess the impact of the scheme?

Market Promotion

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview	DD/MM/YYYY
3.	Permission for interview granted.	(1) Yes (2) No
4.	Respondent Name	
5.	Designation	
6.	District name	
7.	State name	

1. What are the key market promotion activities undertaken by your section?
2. How do you budget for the market promotion?
3. How do you engage exporters as part of market promotion?
4. Where do you face most challenges from beneficiaries perspectives? (Prompt: Scheme awareness, documentation, etc.)
5. What are the major queries from exporters w.r.to market promotion?
6. How often do you interact with exporters for market promotion initiatives?
7. What are your suggestions for market promotion improvements?
8. How do you assess the impact of market promotion?

RGCA

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview	DD/MM/YYYY
3.	Permission for interview granted.	(1) Yes (2) No
4.	Respondent Name	
5.	Designation	
6.	District name	
7.	State name	

1. What is the mandate of RGCA?
2. What is the process for various activities of RGCA? (Problem statement to solution, to deployment etc.?)
3. How do you go about budgeting for various activities of RGCA?
4. What are your development plans for the future?
5. How do you engage beneficiaries as part of your mandate?
6. Where do you face most challenges from market and beneficiaries perspectives?
7. What are the major queries from beneficiaries w.r.to RGCA initiatives?
8. How often do you interact with beneficiaries for RGCA?
9. What are your suggestions for scaling up your programs and activities? (Financial and non-financial)
10. How do you assess the impact of RGCA?
11. Have you carried out any RGCA specific impact assessment?

Mini Labs

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview	DD/MM/YYYY
3.	Permission for interview granted.	(1) Yes (2) No
4.	Respondent Name	
5.	Designation	
6.	District name	
7.	State name	

1. What is the process for establishing mini labs?
2. How do you budget for the scheme?
3. How critical is the mini lab in promoting the exports?
4. Where do you face most challenges in implementing the schemes?
5. How long does it usually take to process applications related to mini labs?
6. How is the uptake of online application? If the interviewee says there are challenges related to online application, probe further.
7. What challenges do you face with online applications?
8. How have you overcome some of these challenges?
9. What suggestions for improvements with regard to the schemes do you think would help?
10. What are the expectations of beneficiaries regarding these schemes and services offered by MPEDA?
11. How often do you interact with beneficiaries post disbursement?
12. What were the main concerns expressed by beneficiaries? (Either during your interaction or other modes of interactions?)
13. How do you address those concerns? Individual or regular meetings? If there are regular meetings, how often do you conduct such meetings?
14. How do you assess the impact of the scheme?

QC & ELISA Labs

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview	DD/MM/YYYY
3.	Permission for interview granted.	(3) Yes (4) No
4.	Respondent Name	
5.	Designation	
6.	District name	
7.	State name	

1. What is the mandate of QC & ELISA section?
2. How are the services offered by QC & ELISA Labs?
3. How critical is the QC & ELISA labs in promoting the exports?
4. What is the beneficiary acceptance of QC & ELISA certificate ?
5. Where do you face most challenges faced by QC & ELISA labs in implementing the schemes?
6. How have you overcome some of these challenges?
7. How do you compete with private labs? In terms of infrastructure, pricing, market acceptance?
8. How do you compare your labs with private labs?
9. What suggestions for improvements with regard to the QC & ELISA do you think would help?
10. How do you address the rejection of consignment at destination markets?
11. What are the expectations of beneficiaries regarding QC & ELISA?
12. How often do you interact with beneficiaries to understand QC & ELISA related services?
13. What were the main concerns expressed by beneficiaries? (Either during your interaction or other modes of interactions?)
14. How do you address those concerns? Individual or regular meetings? If there are regular meetings, how often do you conduct such meetings?
15. How do you assess the impact of the QC & ELISA labs?

Training and Capacity Building

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview	DD/MM/YYYY
3.	Section Name	
4.	Permission for interview granted.	(1) Yes (2) No
5.	Respondent Name	
6.	Designation	
7.	District name	
8.	State name	

1. What are the key training and capacity building initiatives of your section?
2. What is the process for administrating training and capacity building? – mobilization to conduct of training program?
3. How do you budget for the scheme?
4. What percentage of beneficiaries are covered under the training and capacity building? – Potential vis-v-vis Actual coverage?
5. How critical is the training and capacity building in promoting the exports?
6. How do you go about identifying and structuring the coverage for various training programs?
7. Have you done any skill gap analysis of beneficiaries for the respective training programs?
8. What kind of systems are available to track – pre – and post – training feedback?
9. How often do you update the content for the programs?
10. How many trainers do you have? (In-house and external)
11. Have you looked at RPL initiatives of central govt programs?
12. Where do you face most challenges in implementing the training programs?
13. How have you overcome some of these challenges?
14. What suggestions for improvements with regard to the training and capacity building?
15. What are the expectations of beneficiaries in training and capacity building?
16. What were the main concerns expressed by beneficiaries? (Either during your interaction or other modes of interactions?)
17. How do you address those concerns? Individual or regular meetings? If there are regular meetings, how often do you conduct such meetings?
18. How do you assess the impact of your training and capacity building scheme?

NETFISH

S No.	Particulars	Response
1.	Name of interviewer	
2.	Date of interview	DD/MM/YYYY
3.	Section Name	
4.	Permission for interview granted.	(3) Yes (4) No
5.	Respondent Name	
6.	Designation	
7.	District name	
8.	State name	

1. What is the mandate of NETFISH?
2. How do you go about budgeting for various activities of NETFISH?
3. What are your development plans for the future?
4. What percentage of beneficiaries are covered under your programs? – Potential vis-v-vis Actual coverage
5. How do you engage beneficiaries as part of your mandate?
6. Where do you face most challenges from market and beneficiaries perspectives?
7. What are the major queries from beneficiaries w.r.to NETFISH initiatives?
8. How often do you interact with beneficiaries for NETFISH?
9. What are your suggestions for scaling up your programs and activities? (Financial and non-financial)
10. How do you assess the impact of NETFISH?
11. Have you carried out any NETFISH specific impact assessment earlier? If yes, have you incorporated the suggestions of the impact assessment?
12. What are the challenges in implementing/scaling-up your programs?



HEAD OFFICE

The Marine Products Export Development Authority,
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The Marine Products Export Development Authority (MPEDA) was set up by an act of Parliament during 1972. The erstwhile Marine Products Export Promotion Council established by the Government of India in September 1961 was converged in to MPEDA on 24th August 1972. MPEDA is given the mandate to promote the marine products industry with special reference to exports from the country. It is envisaged that this organization would take all actions to develop and augment the resources required for promoting the exports of “all varieties of fishery products known commercially as shrimp, prawn, lobster, crab, fish, shell-fish, other aquatic animals or plants or part thereof and any other products which the authority may, by notification in the Gazette of India, declare to be marine products for the purposes of (the) Act”. The Act empowers MPEDA to regulate exports of marine products and take all measures required for ensuring sustained, quality seafood exports from the country. MPEDA is given the authority to prescribe for itself any matters which the future might require for protecting and augmenting the seafood exports from the country. It is also empowered to carry out inspection of marine products, its raw material, fixing standards, specifications, and training as well as take all necessary steps for marketing the seafood overseas.