

出國報告(出國類別：國際會議)

出席 APEC 海洋與漁業工作小組
(OFWG)「發展漁業微型與中小企業全
球價值鏈架構之最佳實踐研討會」

服務機關：行政院環境保護署

姓名職稱：魏盟巽研究員兼組長

出國地點：巴布亞紐幾內亞摩士比港

出國期間：107 年 5 月 16 日至 5 月 20 日

報告日期：107 年 6 月 20 日

摘要

本次出席 APEC 海洋與漁業工作小組(OFWG)「發展漁業微型與中小企業全球價值鏈架構之最佳實踐研討會」，主要是配合外交部出席 2018 年 APEC 第 2 次資深官員會議暨相關會議。本署出席人員於會中積極參與議題討論，並發言介紹我國政府極力推動 5 加 2 創新產業計畫包括循環經濟與新農業，以及漁業產銷班為我國漁業最基層的組織，藉由漁民結合組成共同經營產銷班，凝聚共識與認同感，擴大產業與經濟規模，強調建立夥伴關係(PPP)可強化微中小型企業之商業應變能力與競爭力，且應鼓勵年輕人從事漁業生產、建立新商業模式等都是漁業價值鏈永續發展之重要因素，達到加強與各會員體資訊交流之目的。

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出國報告

壹、 出國計畫名稱：出席 2018 年 APEC 海洋與漁業工作小組(OFWG)「發展漁業微型與中小企業全球價值鏈架構之最佳實踐研討會」

貳、 出國日期：107 年 5 月 16 日至 107 年 5 月 20 日

參、 出國行程：

107 年 5 月 16 日	啟程至巴布亞紐幾內亞摩士比港
107 年 5 月 17 日	抵達瑞士巴布亞紐幾內亞摩士比港
107 年 5 月 18 日至 19 日	出席 2018 年 APEC 海洋與漁業工作小組(OFWG)「發展漁業微型與中小企業全球價值鏈架構之最佳實踐研討會」
107 年 5 月 20 日至 20 日	返程

肆、 出國目的與過程

一、 出國目的

本次出席APEC海洋與漁業工作小組(OFWG)「發展漁業微型與中小企業全球價值鏈架構之最佳實踐研討會」，主要是配合外交部出席2018年APEC第2次資深官員會議暨相關會議。本署為APEC海洋與漁業工作小組我國聯絡窗口之一(與農委會漁業署)，藉由出席會議，可加強與會員體之資訊交流。

二、 西元2018年海洋與漁業工作小組(OFWG)「發展漁業微型與中小企業全球價值鏈架構之最佳實踐研討會」會議情形

- (一) 西元 2018 年海洋與漁業工作小組(OFWG)「發展漁業微型與中小企業全球價值鏈架構之最佳實踐研討會」於西元 2018 年 5 月 18 日至 19 日於巴布亞紐幾內亞莫士比港國際會議中心召開。本次研討會由巴布亞紐幾內亞主辦，出席會員體有智利、印尼、巴布亞紐幾內亞、秘魯、馬來西亞、我國、泰國、美國、紐西蘭、越南、菲律賓，共 11 個會員體出席，另外邀請來自美國、澳洲、紐西蘭、馬來西亞及印尼等國之專家擔任講者。
- (二) 本計畫目的係透過能力建構，發展漁業微型與中小企業全球價值鏈架構之最佳實踐，以降低漁業部門的貧窮及所得分配不均，並改善微中小型企業的商业環境。
- (三) 會議邀請巴布亞紐幾內亞(PNG)國家漁業局養殖漁業部門主管 Jacob Wani 開幕致詞，研討會議題包括 APEC 會員體漁業微型與中小企業(MSME)現況、價值鏈之挑戰、價值鏈之挑戰的應對、支持漁業微中小型企業之政策與法規架構等。

- (四) 美國講者 Shanna Grafeld 表示，太平洋小島國之漁業提供未來成長與繁榮的唯一實踐的機會。為了解各會員體漁業 MSME 的特色，她請會員體代表發言進行資訊分享。我方代表發言說明鼓勵青年投入漁業生產，以解決漁業勞力缺乏與老化問題，並且可因而引進新數位科技應用於漁業生產，增加其生產力與附加價值。另外，提供資金援助也是促進漁業微中小型企業發展的關鍵因素。
- (五) 紐西蘭專家 Claire Massey 發表 21 世紀從事商業的挑戰，她特別提到我方代表有關鼓勵青年從事漁業生產的意見是非常好的想法。Massey 提到目前國際資訊發達且傳播迅速，不過有時因資訊過於繁雜，以致無法聚焦而事倍功半。她舉出世界經濟論壇(WEF)為例，35 個經濟體，42 項全球議題，20 項工業領域，14 項系統倡議等。她建議應找出關鍵議題與其關聯性(Identify the issues and understand the connections)以及分析資料(Analyze data)等方法，已讓漁業生產者能夠更清楚瞭解漁業產業資訊。她並提到霍夫斯泰德文化維度理論(Hofstede's cultural dimensions theory)及 Anholt 的優良國家指數(Good Country Index) 等理論探討文化差異與資源差異在價值供應鏈之關鍵因素。
- (六) Shanna Grafeld 請會員體代表就 MSME 價值鏈落差進行分組討論，PNG 代表表示，商業技巧、缺乏教育、市場行銷、產品加值、產品認證、等都是相當有挑戰性。我國代表表示，科技、認證系統、勞力缺乏、鼓勵年輕人從事漁業生產、商業技巧與新商業模式等都是漁業價值鏈永續發展之重要因素。
- (七) 印尼專家 Irna Sari 發表開發中國家漁業 MSMEs 全球價值鏈的挑戰與障礙。資料顯示，漁業於開發中國家是重要產業，但大多為中小企業。世界漁產量逐年增加包括漁獲量與養殖業，美國、歐盟及日本為主要進口國，約占全球 59%。他並分析全球漁業貿易治理，可追蹤性(Traceability)與標章認證等為多角色全球貿易治理(multi-actor global trade governance)，食品安全、漁業資源、管理措施、非法、未報告、不受規範措施(Illegal, Unreported, Unregulated, IUU)等是政府主導之治理。品質與產量、成本效益及市場等為市場與買家之治理。她指出，微中小型漁業面對全球市場之挑戰與障礙主要包括有限的漁業基礎設施包括冷藏、冰塊供應等、偏遠漁業侷限於有限的買家、無能力去因應全球管理系統、無能力進行產品加值等。她認為夥伴關係以及策略一貫性、法規機制之支持、研發的支持、創新、技術支援以及良好基礎設施等是解決微中小型漁業面對全球市場之挑戰與障礙的方法。
- (八) 澳洲專家 Guy Watson 就中小企業獲得財務支援之挑戰與機會進行分享。他指出，全球價值鏈包括小型漁家、貿易商、漁產加工、消費者(本地、區域及全球)。他指出在全球供應鏈中，可提供漁家技術協助、改善各角色之聯繫以及基礎建設如人工養殖場等。他指出面對挑戰可就組成強有力之漁業組織、生產力提升、基礎設施投資、市場連結、資本取得、法規機制等面向探討，但有些面向難在短期內達成。
- (九) 巴布亞紐幾內亞出席官員報告該國漁業中小企業推動情形，
- 1、 該國人口數為 842 萬，國民生產毛額(GDP)為 2,183 美元(西元 2014

年)，預期壽命約 65.54 歲(西元 2016 年)。該國中小企業政策包括中小企業數從 4 萬 9,000 家成長至 50 萬家(西元 2030 年)、僱用人數從 29 萬 1,348 人增加至 2 百萬人(西元 2030 年)、國民所得從 2,000 美元增加至 9,600 美元。

- 2、 APEC 對漁業微中小型企業並無明確定義，不過多數國家以僱用員工數為標準，例如從紐西蘭 20 位員工數至中國的 1,000 位員工數。巴國則以年銷售額劃分，年銷售額低於 20 萬 K (巴國幣值) 為微型企業、高於 20 萬 K 低於 5 百萬 K 則為小型企業、高於 500 萬低於 1,000 萬為中型企業。
- 3、 巴國提供漁業中小企業支援包括漁業基礎建設含碼頭、魚市場及與冷凍儲藏、小型信貸(micro credit facility)、計畫發展基金、養殖計畫、漁業合作、訓練與能力建構等。
- 4、 巴國漁業中小企業面臨之挑戰包括供應端受限；商業環境包括銀行與信貸機構、運輸服務、市場進入等；高成本之商業經營與經濟規模；資訊與通訊科技應用；能力欠缺等。
- 5、 巴國推動為中小企業進入全球價值鏈之措施包括稅的減免；補助與提供啟動營運之資金等；信貸取得；訓練與能力建構包括食品安全與文化差異；夥伴關係等。另外產品安全、產品標示、海關流程、運輸、冷藏以及國內市場與國外市場的進入等。

(十) 馬來西亞專家 Bill Downing 針對利益相關者參與(Stakeholder engagement)議題進行經驗分享，依聯合國發展署(UNDP)之定義，多方利益相關者參與過程(MSEP)是用於確保參與特定問題並且基於一系列原則的(結構化)過程。他們旨在確保參與公平及透明，並在不同利益者之間發展夥伴關係和網絡。他指出利益相關者參與之重要性包括找出優先事項、機會與利益；找出可能限制與衝突；互相學習；提供回饋與監測機制；提供對話機制等。他並指出建立利益相關者溝通學習平台，提供安全空間讓利益相關者參與，因此建立互信與分享資訊。他並建議，推動相關計畫之步驟包括願景與行動計畫規劃、執行行動方案、監測、評估與學習、重新檢視計畫規劃之循環式作法。

(十一) 印尼專家 Irma Sari 報告有關促進性別參與中小企業發展。資料顯示，東亞與東南亞地區之女性勞動力參與超過 5 成，亞洲養殖漁業產量占全球 88%。女性參與漁業之決定因素主要包括能力、教育、體力及社會規範等。女性參與漁業之正面效益包括經濟效益與社會效益如增加技能與自信以及社會尊重等。負面影響可能包括社會評斷、時間負擔、家庭生活、安全風險等。女性參與之成功與否取決於家庭支持、財務支持、社會規範、教育與訓練等。

(十二) 會議進行小組討論探討各經濟體如何面對中小企業之挑戰，我方發言介紹我國政府極力推動 5 加 2 創新產業計畫包括循環經濟與新農業。漁業產銷班為我國漁業最基層的組織，藉由漁民結合組成共同經營產銷班，凝聚共識與認同感，擴大產業與經濟規模。我方強調建立夥伴關係(PPP)可強化微中小型企業之商業應變能力與競爭力。我方之發言引起會員體之興趣。

(十三) 紐西蘭專家 Claire Massey 報告創造漁業微中小型企業之良好政策與法規環境。她強調成功的政策形成必須要有明確的目標且有詳細評估。正確的數據、清晰的思考、對於中小企業之實際認知都是成功的重要因素。

(十四) 本次會議將由主辦單位進行後續總結報告之撰寫，並預定於本年 8 月舉行之第 3 次資深官員會議(SOM3)暨相關會議進行會議成果報告。

伍、心得與建議

- 一、我方於會議期間分別與巴布亞紐幾內亞、智利、印尼、秘魯、泰國，越南等經濟體以及來自美國、紐西蘭、澳洲及印尼等國之專家進行互動。我方在分組討論時，亦積極發言針對議題表達看法與各國出席人員分享。鑑於我國在國際舞台之受限，未來應持續積極派員出席相關國際會議。
- 二、我方於出席本次會議時，特別邀請巴布亞紐幾內亞派員出席本署預定於 10 月舉辦之「第 19 屆亞太經濟合作組織企業/私人部門參與海洋環境永續性圓桌會議 (the 19th APEC Roundtable Meeting on the Involvement of the Business/Private Sector in Sustainability of the Marine Environment)」，深化雙方在 APEC 架構下合作，展現我國對巴紐主辦本年 APEC 之支持。

陸、附件



Asia-Pacific
Economic Cooperation

**WORKSHOP ON DEVELOPING A BEST PRACTICE GLOBAL VALUE CHAIN
(GVC) FRAMEWORK FOR FISHERIES MICRO, SMALL & MEDIUM
ENTERPRISES (MSME)**

PROGRAM

TIME	ACTIVITY	PRESENTER/SPEAKER
DAY ONE: May 18		
0900-0930	Registration	
0930-1000	Introduction and Welcome Remarks	Managing Director
1000-1015	Group Photo	Media
<i>MORNING TEA</i>		
SESSION 1: CURRENT STATUS OF FISHERIES MSMEs IN APEC		
1030-1100	Framing MSME and Fisheries MSME in APEC Region	Shanna Grafeld
1100-1130	Challenges of Conducting Business in the 21 st Century (national, regional and international perspectives)	Claire Massey
1130-1230	Bridging the Gaps & Changing the Status Quo for sustainable and inclusive growth	Shanna Grafeld
<i>LUNCH</i>		
SESSION 2: CHALLENGES IN THE VALUE CHAIN		
1330-1400	Challenges and Obstacles in the Global Value Chains: Perspectives of the Fisheries MSMEs in developing countries	Irna Sari
1400-1430	Access to Financial Services, Financial Security and Empowerment	Guy Watson
1430-1500	PNG value chain challenges	Rodney Kirarock
<i>AFTERNOON TEA</i>		
1530-1600	What are the top challenges your economy faces in the value chain?	Roundtable Discussion
1600-1615	Day 1 wrap up	Shanna Grafeld
1900-2100	WELCOME COCKTAIL	Hosted at Yacht Club by Managing Director, NFA

DAY TWO MAY 19

SESSION 3: MEETING THE CHALLENGES WITHIN THE VALUE CHAIN

0900-0930 Stakeholder engagement Bill Downing

0930-1000 Creating an enabling environment for Women-led business (Gender Equality and Women Empowerment in contemporary business setting) Irna Sari

MORNING TEA

1015-1045 Partnerships (PPP) in Fisheries MSME Bill Downing

1045-1115 What skills are necessary to meet the challenges your economy faces? Round Table Discussion

LUNCH

SESSION 5: POLICY AND LEGISLATIVE FRAMEWORK TO SUPPORT THE MSME SECTOR

1430-1500 Creating conducive environment (policies & regulations) for MSME Claire Massey

1500-1530 Project Planning Guy Watson

1530-1600 Capacity Building & Training HR, Finance & Management Bill Downing

1600-1630 Making policies realistic, based on past successes, and measurable Roundtable Discussion

AFTERNOON TEA

SESSION 6: SUMMARY OF WORKSHOP

1700-1715 Summary of Day 1 Presentation & Discussions Shanna Grafeld

1715-1730 Summary of Day 2 Presentation, Discussions & Way Forward Shanna Grafeld

1730-1745 Wrap Up of Workshop/ Closing Remarks Rodney Kirarock



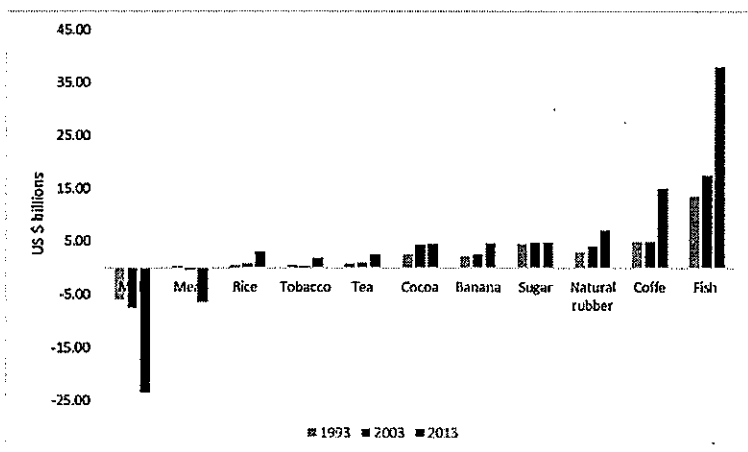
CHALLENGES AND OBSTACLES IN THE GLOBAL VALUE CHAINS: PERSPECTIVES OF THE FISHERIES MSMES IN THE DEVELOPING COUNTRIES

Irna Sari
Sustainable Fisheries Advisor

Presented in
The Second APEC Senior Officials Meeting (SOM2) and Related Meetings and MRT - 18 - 19 May 2018
Port Moresby, Papua New Guinea.



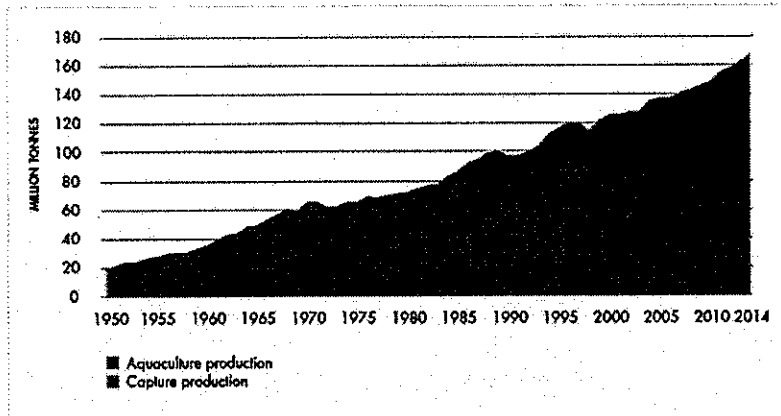
Net exports of primary commodities from developing countries



- Fisheries is important sector.
- Fisheries in developing countries is dominated by medium- and small-scale.

Source: Vannuccini 2017

World capture fisheries and aquaculture production

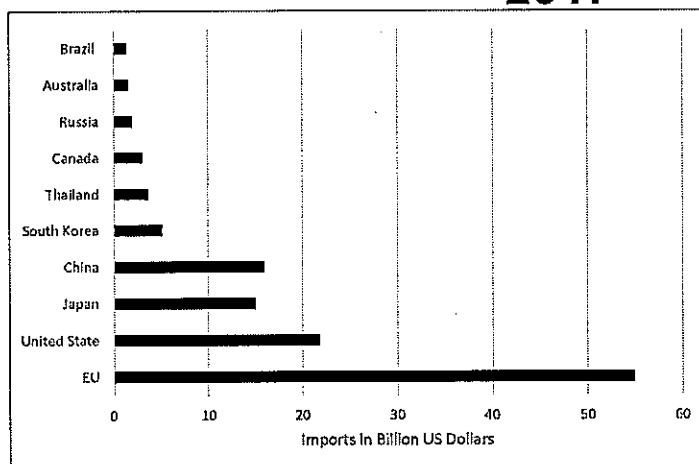


Source: FAO 2016



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Leading importers of fish and fisheries products 2017



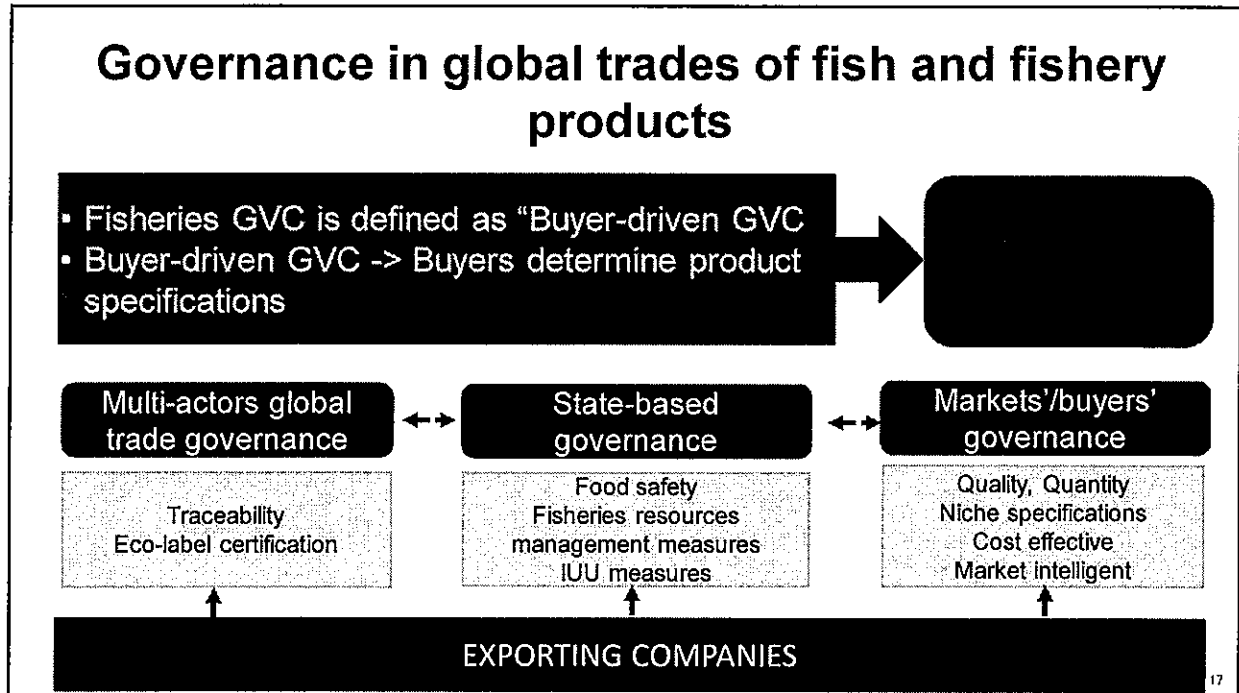
Source: Statista 2018

The EU, the United States of America and Japan are dependent on fishery import for domestic consumption.

63 % in value and 59% in quantity combined for 2014.

Source: FAO, 2016

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Governance in global trades of fish and fishery products

Traceability becoming a necessity

By Steven Hedlund
March 15, 2009

SHARE



Implementing a traceability option for seafood suppliers, i panelists at Sunday's conferer It's Good for the Seafood Industry International Boston Seafood

UK supplier, MCS, MSC launch foodservice seafood guide

By SeafoodSource staff
September 24, 2014



EU, Norway mackerel upgraded on fish to eat list

By Jason Holland
May 16, 2018

Canada's largest herring fishery scores MSC certificate

By Madeline Roberts
December 1, 2014

SHARE



Canada's largest herring fishery, operating out of the Bay of Fundy area, has achieved certification from the Marine Stewardship Council (MSC).

NMFS announces SIMP to begin with "informed compliance" period

By Sara Jankowski
November 21, 2017



Industry's challenge to seafood import monitoring program rejected

By GUY CARO
August 21, 2017

SHARE



A legal challenge to the Seafood Import Monitoring Program (SIMP) -- a set of regulations requiring

McDonald's introduces new Japanese-inspired salmon burger

May 8, 2018



Burger King to introduce cod pie in Chinese market

May 2, 2017



BARBARI'S RESTAURANT

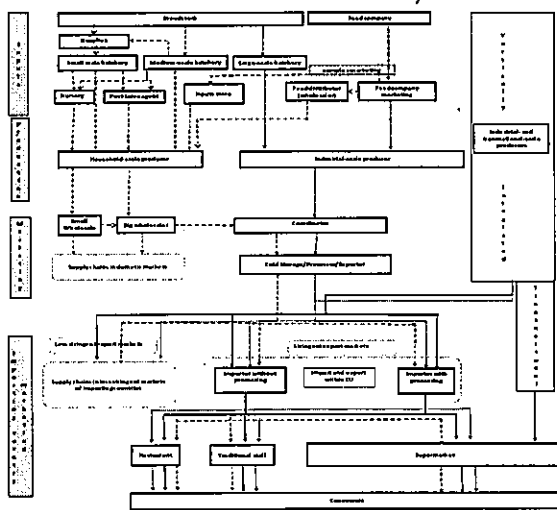






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General attributes of GVC for medium- and small scale - enterprises

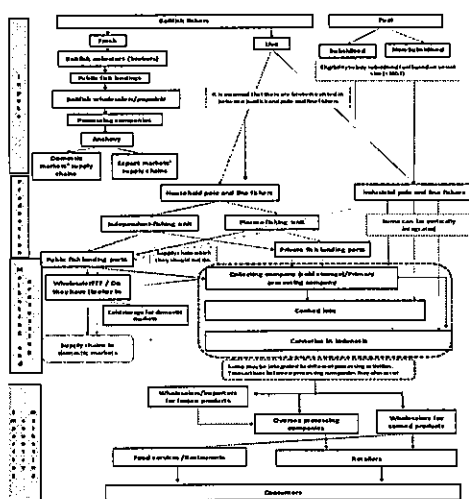


Indonesian Farmed shrimp GVC

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- Small production.
- Small-, and medium scale's GVCs are very fragmented.
- Involve many intermediaries.
- Lengthy supply chains.

General attributes of GVC for medium- and small scale - enterprises



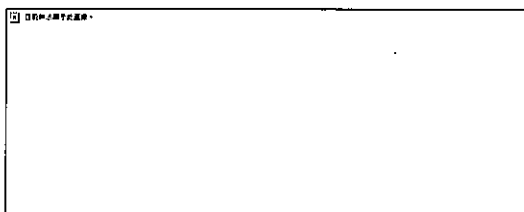
Indonesian handline tunas GVC

8 of 17

- Often scattered across wide geographical range and at remote areas.
- Limited access to services and capitals.
- Limited skills and knowledge.
- Often practices are determined by common practices.
- Lack of R&D support in determining market innovation and product competitiveness.

Challenges and obstacles of SMES to meet the global market needs

- Poor post harvest handling and quality.



9 of 17

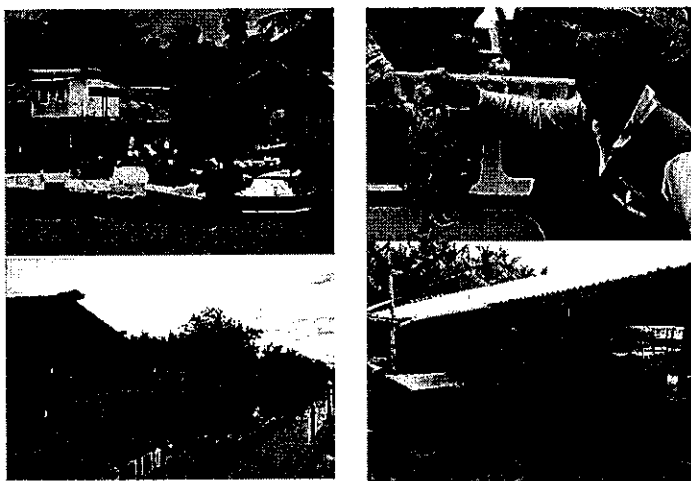
Challenges and obstacles of SMES to meet the global market needs



- Limited fishery infrastructures : cold storage, clean water & ice supplies and cold chains.
- Fishery infrastructures do not meet hygienic and food safety standards.

10 of 17

Challenges and obstacles of SMES to meet the global market needs

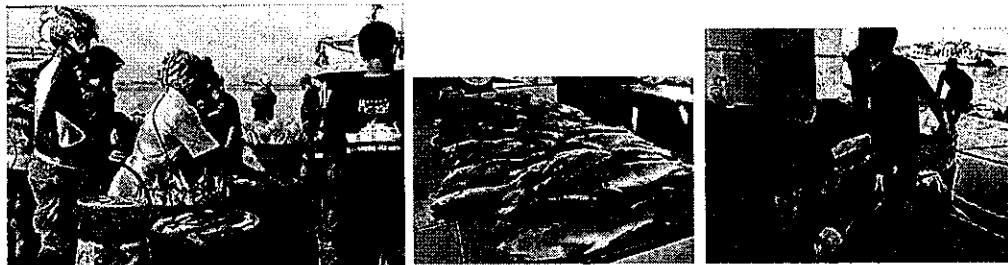


Fishers in remote areas are often dependent on a limited buyers; limited market access.

11 of 17

Challenges and obstacles of SMES to meet the global market needs

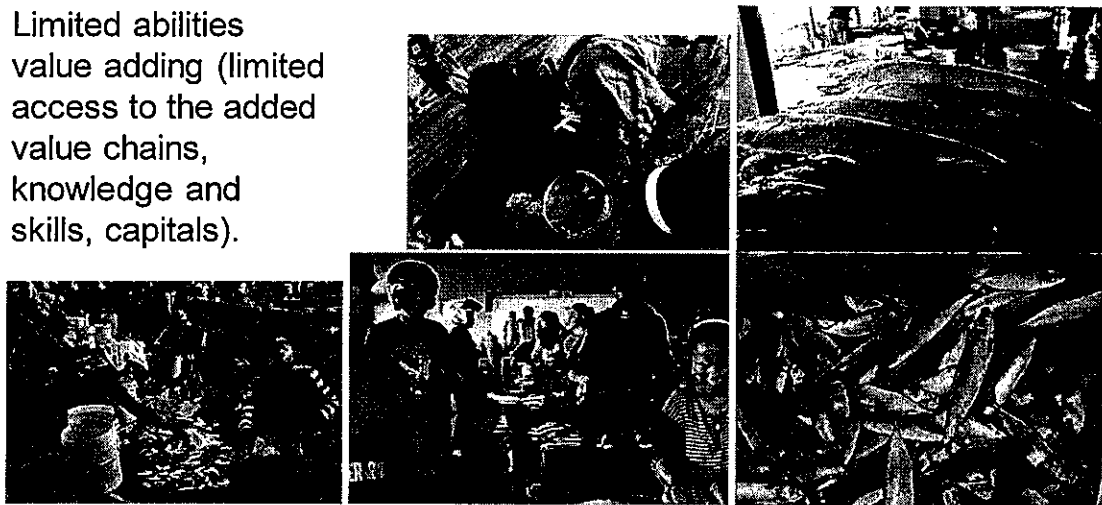
- Limited abilities to comply with global management measures and traceability.
- Lack of data landing monitoring and integrated production/catch data.
- Weak fishery management policies.
- Limited technical supports



12 of 17

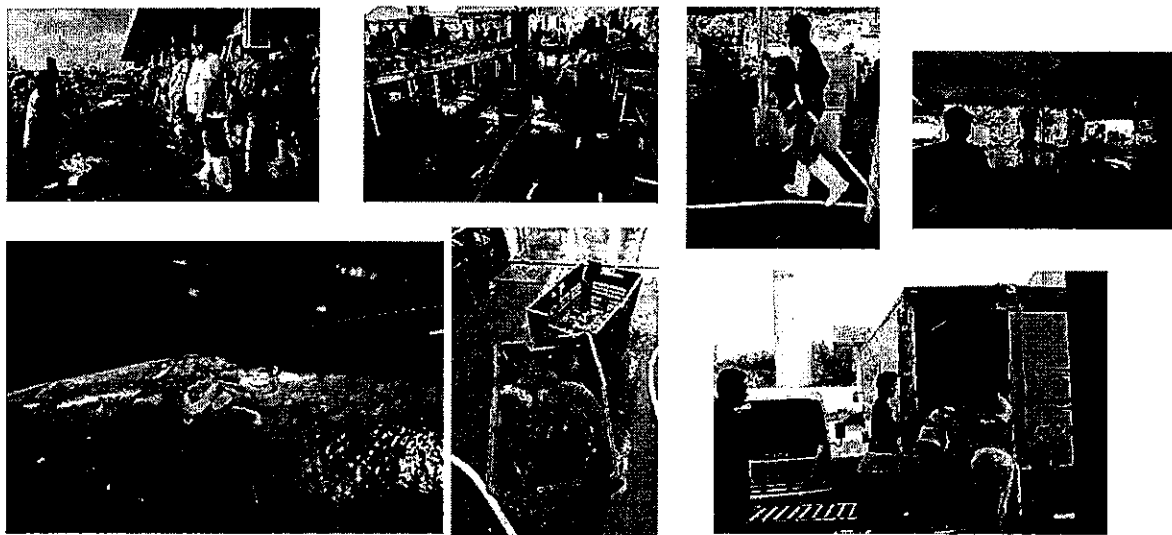
Challenges and obstacles of SMES to meet the global market needs

- Limited abilities value adding (limited access to the added value chains, knowledge and skills, capitals).



13 of 17

Best practices fish handling General Santos, the Philippines



14 of 17

Moving forward for medium- and small scale – enterprises in GVC

among government-private sector-non-government organization is a way to alleviate barriers.

is a must; many government investments tend to be random.

- Prioritize fisheries (commodities) target.
- Understand the context of the fisheries: fishing communities, fisheries and fishers socio-economic attributes, existing government program and etc.
- Understand the GVC of the fisheries /commodities targets.
- Establish and strengthen database system for monitoring and evaluating the investment target.

15 of 17

Moving forward for medium- and small scale – enterprises in GVC

Institutional supports

- Enabling policies
- Institutional development for efficient value chains.

Technical supports

- Access to finance.
- Access to technology.
- Access to markets and efficient supply chains
- Access to skills, knowledge and information.

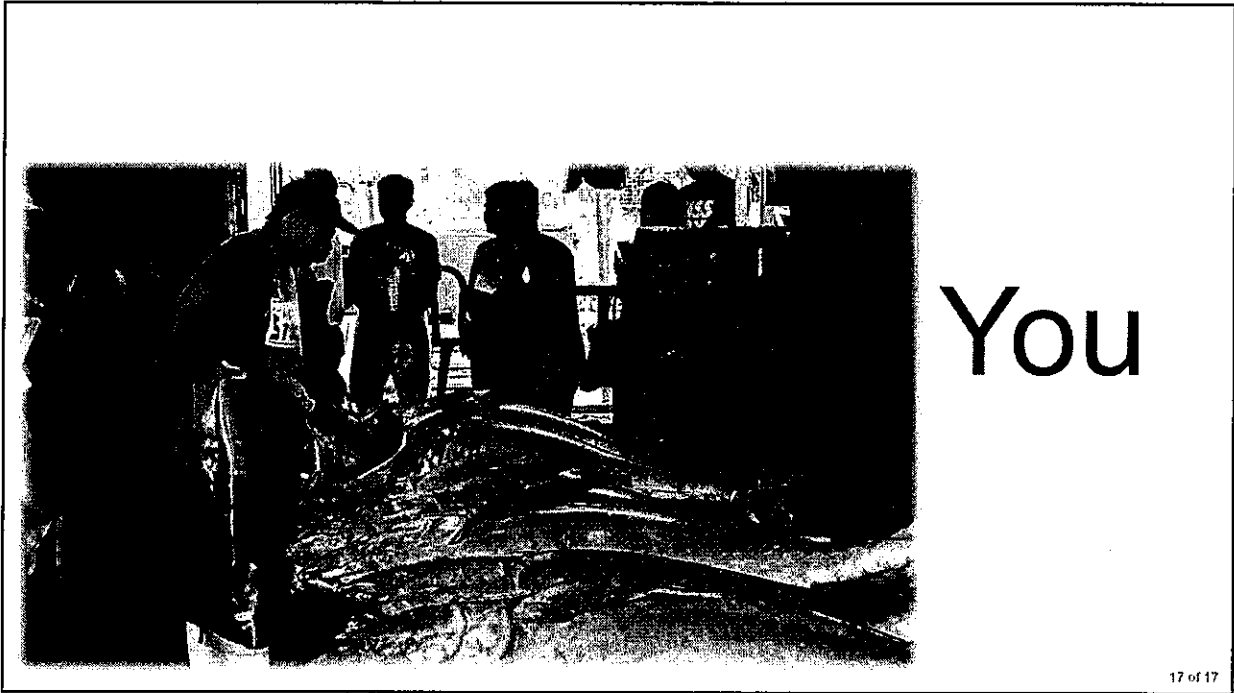
R&D support

- Innovations.
- Business intelligent

Infrastructures

- Well managed fisheries infrastructures; ice plant, cold storage, fish landing and ports, integrated and connectivity.

16 of 17



You

Multi Stakeholder engagement



Bill Downing – 19th June 2018

This presentation

- What is it;
- Why is it important;
- How is it done;
- Policy recommendation;
- Questions

What are they?



Multi-Stakeholder Engagement Processes (MSEPs) are (structured) processes that are used to ensure participation on a specific issue and are based on a set of principles, sometimes inspired by the rights-based approach to development. They aim to ensure participatory equity, accountability and transparency, and to develop partnerships and networks amongst different stakeholders



Asia-Pacific
Economic Cooperation

-
- Facilitates the attainment of APEC goals through appropriate partnerships
 - Strengthens the quality of APEC's work by drawing on relevant insight and expertise
 - Strengthens understanding and support for APEC's goals through openness, transparency and a broad-based partnership that seeks multiple perspectives from the community.
-

Why is it important ⁽¹⁾?

- here all voices particularly the vulnerable;
- identify priorities, opportunities and benefits;
- identify potential constraints and conflicts;
- learning from and incorporating local knowledge;
- providing a feedback and monitoring mechanism;
- providing meaningful access to dialogue and decision-making

(1) UNDP Stakeholder Engagement - 2017

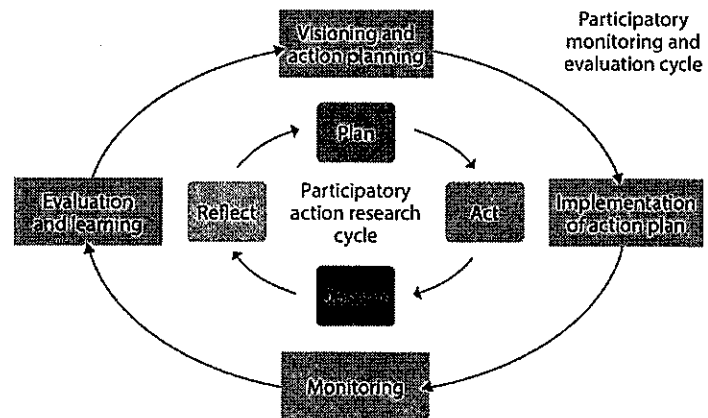
How to do it_(u)?

- Develop and sustain a culture of participation;
 - Strength based development;
 - Theory of Change and Impact Pathways;
 - Scenario planning
- Build/buy key capacity and competency:
 - Facilitation;
 - Negotiation;
 - Relationship;
 - Communication
- Start early
- 3 C's - Communicate, communicate, communicate

How to do it



RESEARCH PROGRAM ON
Aquatic
Agricultural
Systems



Potential policy recommendation

- Establish, nurture and grow Innovation and Learning platforms to provide safe spaces for stakeholders to engage, plan, implement, reflect, learn and adapt. Guided by inclusive and participatory approaches these platforms will build confidence, and trust between different actors and serve as a mechanism for providing mutually acceptable solutions, a greater sense of ownership, transparent and inclusive decision making, stronger stakeholder networks, accountability, and a sense of empowerment, thereby contributing to improved governance.

Global Value Chains for fisheries and aquaculture

Smallholder access to financial services- challenges, experiences and new opportunities

Presented by Guy Watson

May 2018

Global Value Chains for fisheries and aquaculture



Presentation summary

The challenge in traditional value chain improvement methodologies

How we have addressed these

Case study- Aceh Aquaculture Cooperative, Indonesia

Learnings

GVCs- a framework

What issues are we addressing
when looking at SME and
smallholder challenges in Global
Value Chains?

GVCs- a framework

In primary production, a significant
proportion (eg 80% in aquaculture
across Asia) comes from
smallholders.

And if we agree that agricultural
value chains are to be the leverage
point for economic growth in an
economy.....

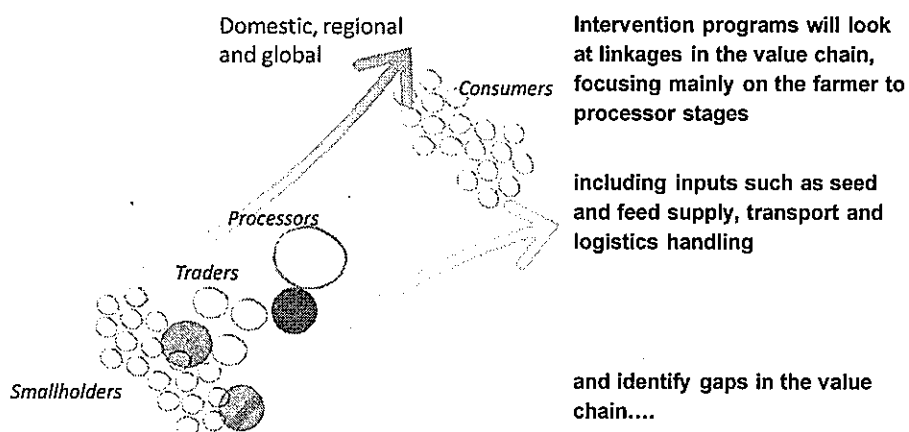
GVCs- a framework



... then the challenge is to improve the value chains in a way that strengthens and benefits smallholders.

Do the current models for intervention do this?

GVCs- a framework



GVCs- a framework

Intervention theory

To provide capital, grant funded interventions invest public capital to:

- Provide technical assistance to farmers
- Improve linkages between players
- Make infrastructure investments- such as hatcheries



GVCs- a framework

Does this work?

Current intervention models
sometimes
struggle to do this because they
focus on a bottom-up approach.

GVCs- a framework

A typical intervention model



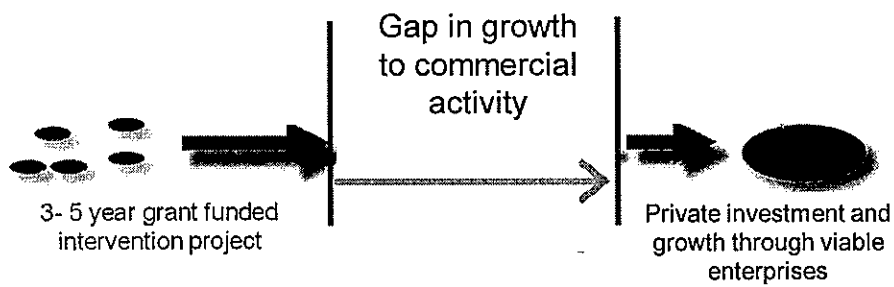
GVCs- a framework

A typical intervention model



GVCs- a framework

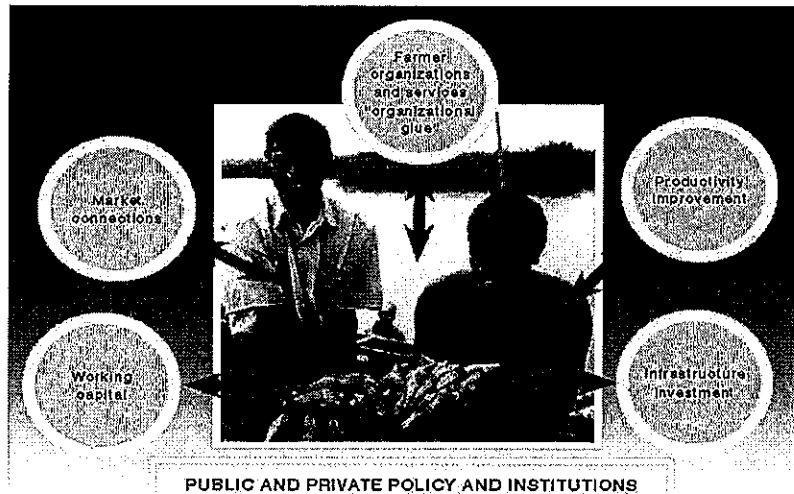
A typical intervention model



The challenge

How do we address this challenge?

The challenge



The challenge

How do we address this challenge?

- Strong farmer organisations
- Productivity improvements
- Infrastructure investment
- Market connections
- Access to capital

- Underpinned by public and private policy institutions

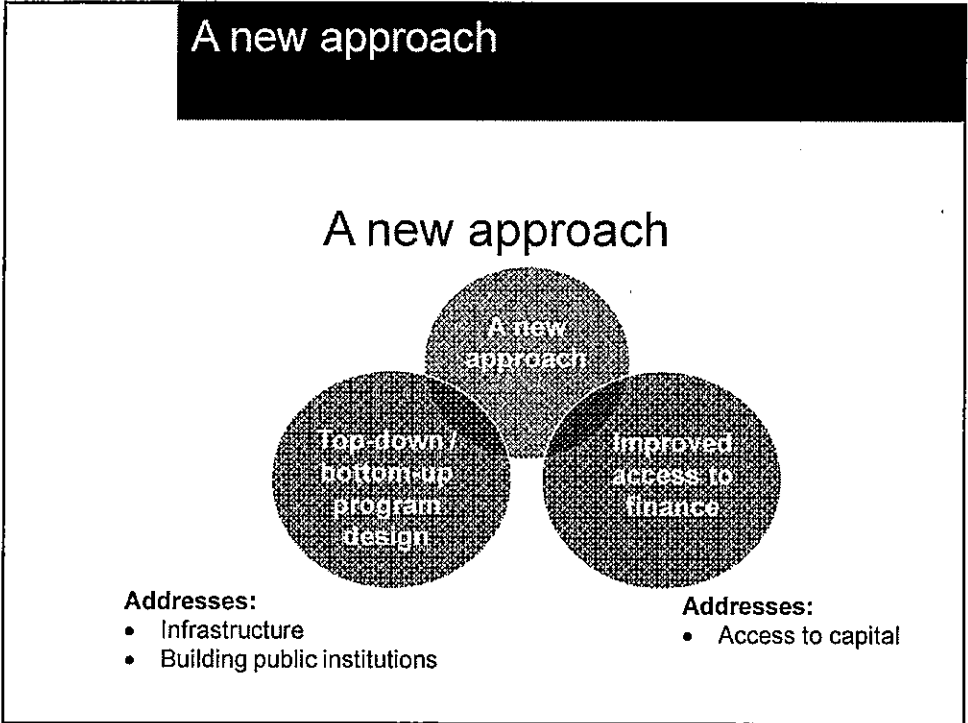
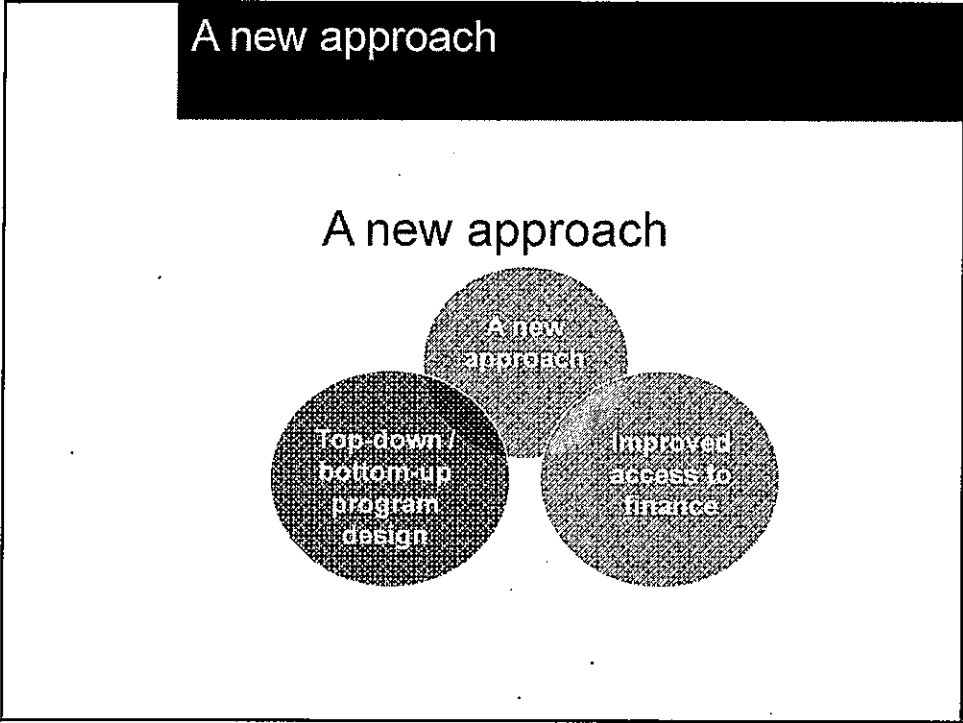
The challenge

WordFish 'plank'	Solved by simple interventions?
Strong farmer organisations	YES
Productivity improvements	YES
Infrastructure investment	NO
Market connections	MAYBE
Access to capital	NO
Public policy institutions	NO

The challenge

From this slide we can see that the key barriers to this successful intervention are:

- Infrastructure
- Building public and private institutions
- Providing access to capital and markets



Case study- Aceh Aquaculture Cooperative



This model focuses on the path to building sustainable businesses, and is based on a WorldFish sustainable trade project in Aceh, Indonesia, in conjunction with the IDH Sustainable Trade Initiative

Case study- Aceh Aquaculture Cooperative



WorldFish provided technical support for an shrimp farming cooperative in Aceh.

From 2003 to 2017 it grew from 43 members to over 650.

The cooperative procures seed and feed for farmers, and manages the extension work through a lead-farmer cluster model.

Case study- Aceh Aquaculture Cooperative



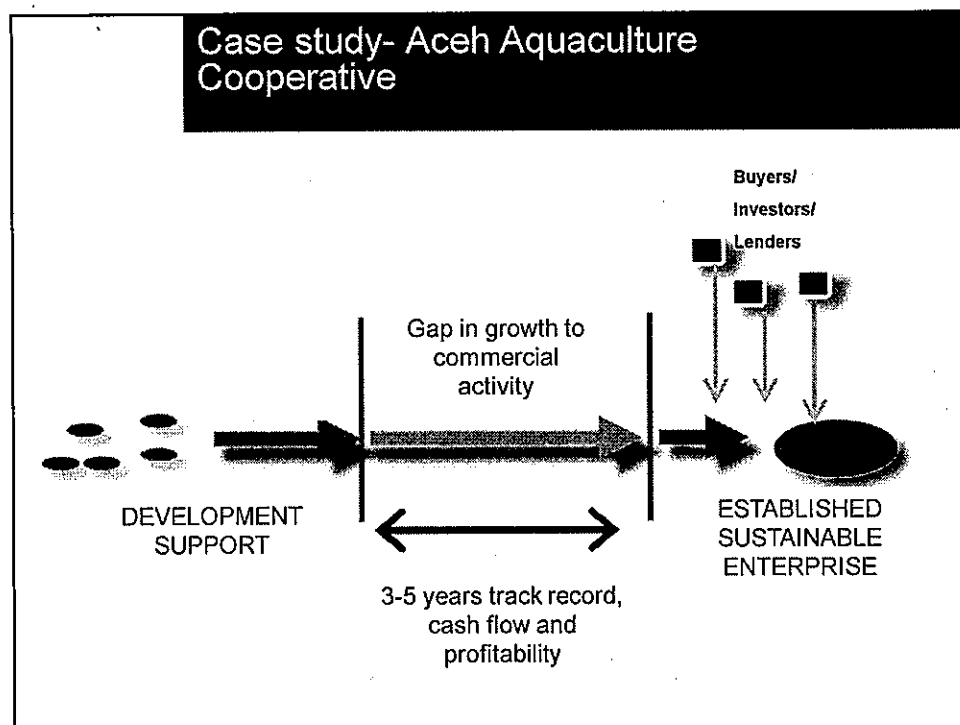
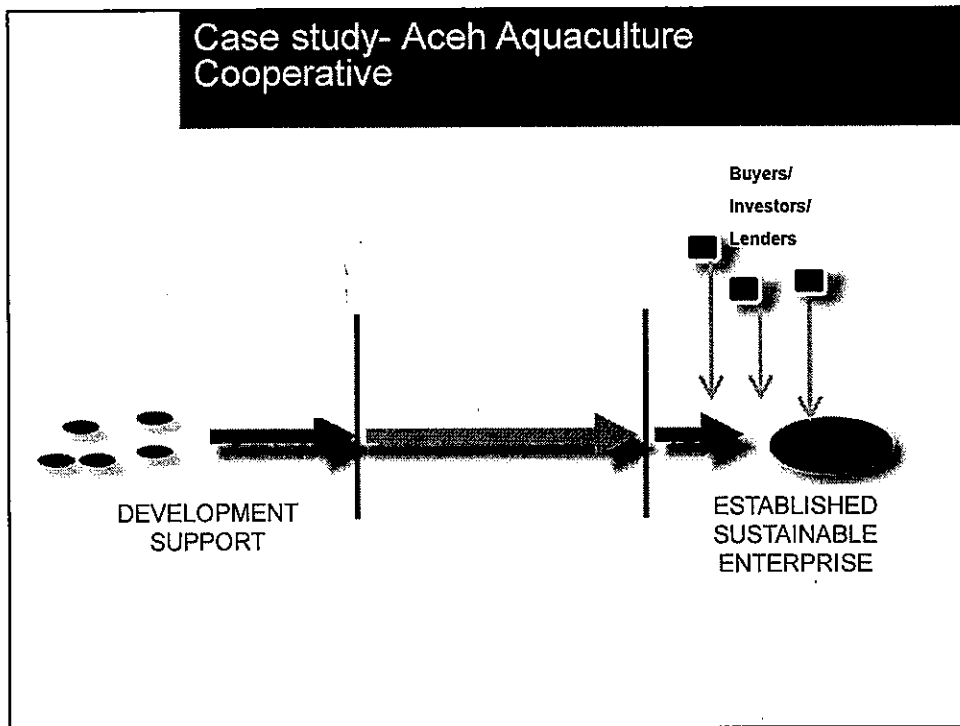
Over this period the cooperative could raise much needed expansion capital from commercial banks without a track record or collateral.

In 2016 Rabobank Foundation agreed to lend USD25,000 at risk for lending to farmers for expansion capital.

This was extended into 2017, and 2018.

Case study- Aceh Aquaculture Cooperative

The theory behind this model....

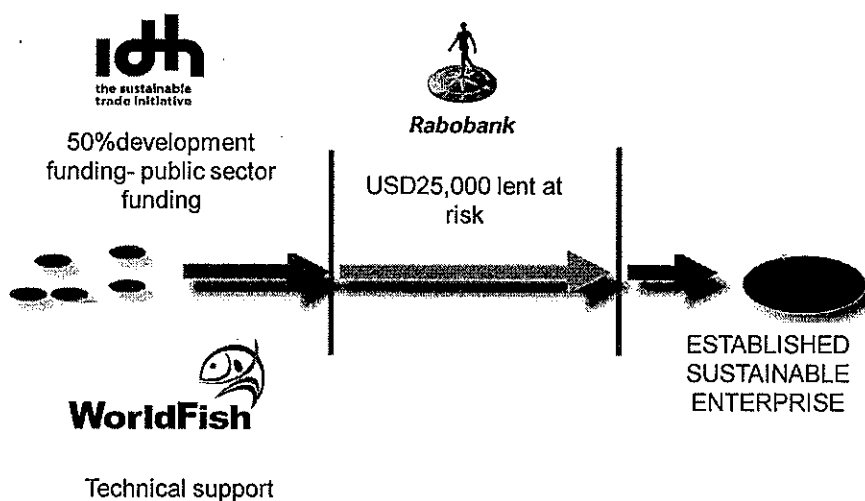


Case study- Aceh Aquaculture Cooperative

Aceh Aquaculture Cooperative-
Indonesia- partnership between IDH,
WorldFish and Rabobank



Case study- Aceh Aquaculture Cooperative



Key learnings



The key lessons learned from this project were:

- Grant-funded programs encourage 'aid-dependency' and recipients should be encouraged to move away from this as quickly as practical

Key learnings

The key lessons learned from this project were:

- Grant-funded programs encourage 'aid-dependency' and recipients should be encouraged to move away from this as quickly as practical

Key learnings

(Key lessons)

- Private sector lending or investment will not appear at the end of a project with no pre-planning;

Key learnings

(Key lessons)

- Private sector lending will only be available to enterprises with collateral, and a track record- a business may require 3-5 years to build this up

Key learnings

(Key lessons)

- This 3-5 year period should be integrated into the project, and a transition model implemented that provides capital at risk (eg Rabobank Foundation model);

Key learnings

(Key lessons)

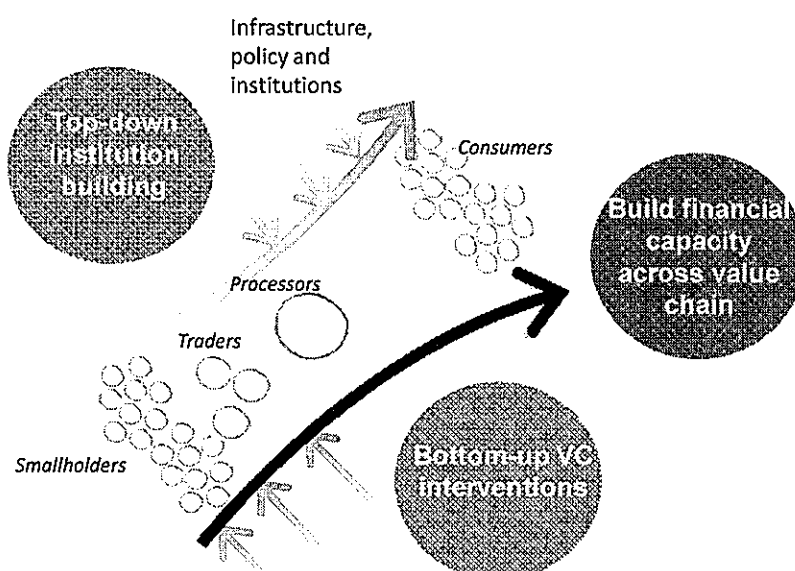
- A range of finance solutions can be leveraged to bridge this gap such as:
 - Cooperatives as micro-lenders
 - Loan guarantees,
 - Cash for collateral,
 - First 5% default coverage,
 - Blended finance models etc.

Key learnings

(Key lessons)

- The integration of private capital (as commercial debt, or private equity) into these programs needs to be planned from the outset, and not added onto at the end of the program.

Conclusion

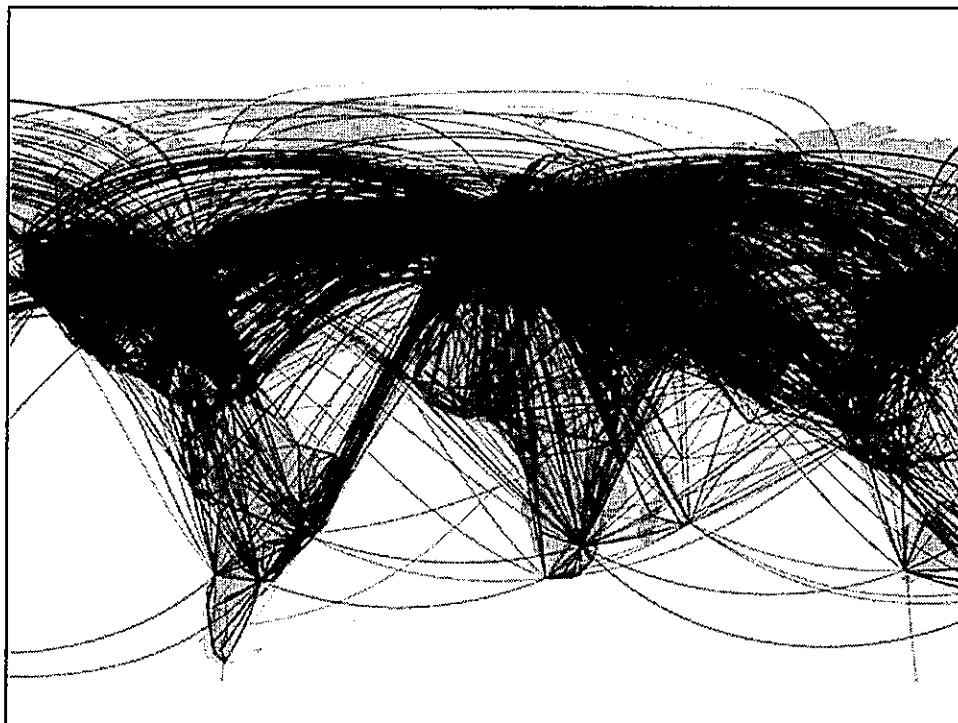


Access to finance

Thank you

Guy Watson
Global Edge Fifth Pty Ltd (Australia)

*GLOBAL*edge.



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Challenges of conducting business in the 21st century

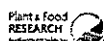
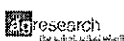
Professor Claire Massey
Massey University & the NZFSSRC

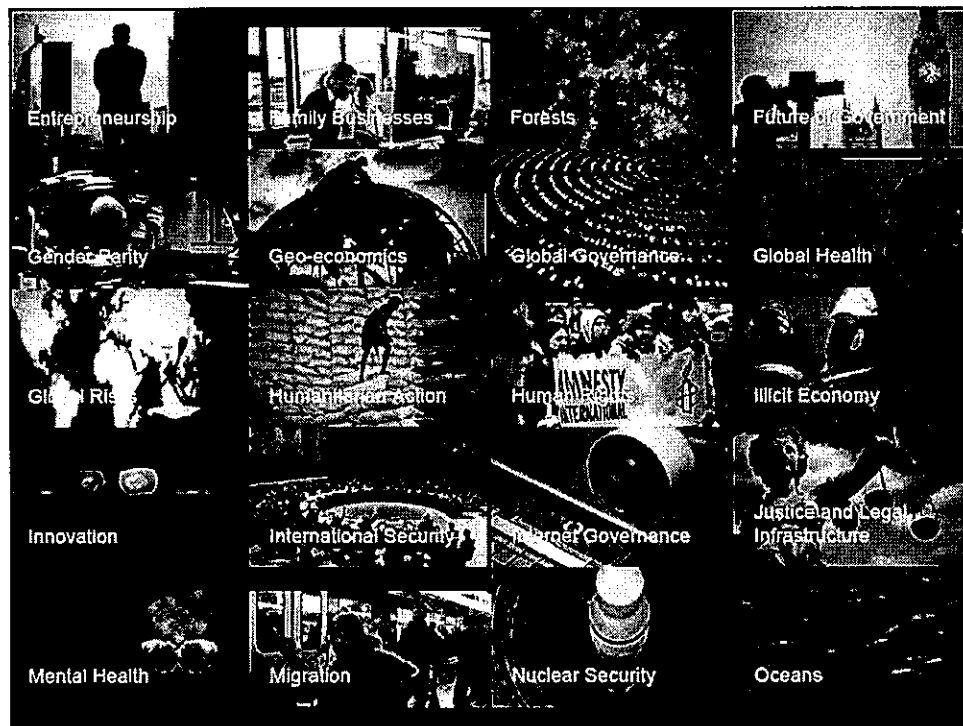
Workshop: Developing a Best Practice Global Value Chain Framework for
Fisheries MSMEs
Port Moresby, May 18-19, 2018

FUNDERS:



COLLABORATING PARTNERS:





WEF INSIGHT AREAS

- 35 ECONOMIES
- 42 GLOBAL ISSUES
- 20 INDUSTRIES
- 14 SYSTEM INITIATIVES
- 14 FACETS OF THE 4TH INDUSTRIAL REVOLUTION




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SELECTED INSIGHT AREAS

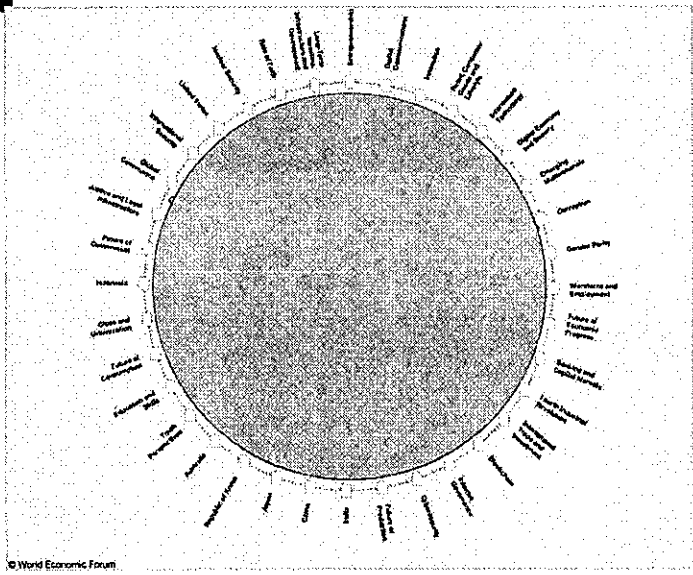
- 3D Printing
- Advanced Materials
- Ageing
- Arctic
- Artificial Intelligence and Robotics
- Arts and Culture
- Behavioural Sciences
- Biotechnology
- Blended Finance
- Blockchain
- Circular Economy
- Cities and Urbanization
- Civic Participation
- Climate Change
- Corruption
- Cybersecurity
- Drones
- Education and Skills
- Emerging Multinationals
- Entrepreneurship
- Family Businesses
- Forests
- Fourth Industrial Revolution
- Future of Government
- Gender Parity
- Geo-economics
- Global Governance
- Global Health
- Global Risks
- Human Enhancement
- Human Rights
- Humanitarian Action
- Illicit Economy
- Innovation
- International Security
- Internet Governance
- Internet of Things
- Justice and Legal Infrastructure
- Mental Health
- Migration
- Neuroscience
- Nuclear Security
- Oceans
- Precision Medicine
- Public Finance and Social Protection Systems
- Role of Faith
- Sensors
- Social Innovation
- Social Media
- Space
- Sustainable Development
- Values
- Virtual and Augmented Reality
- Water
- Workforce and Employment
- Youth Perspectives

Source: World Economic Forum

HOW TO MAKE SENSE OF THIS OVER-SUPPLY OF “INSIGHTS”?

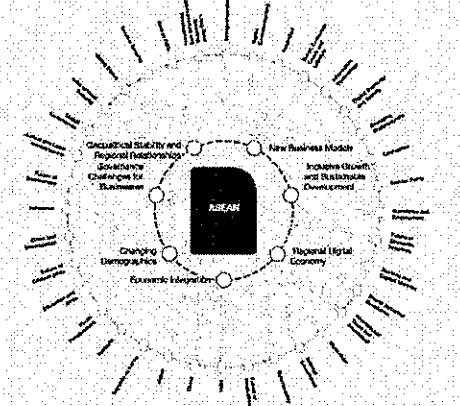
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TRANSFORMATION MAPS



© World Economic Forum

ASEAN - ISSUES



The diagram shows a central 'ASEAN' box surrounded by six key areas: 'Geographical Stability and Regional Resilience', 'New Business Models', 'Inclusive Growth and Sustainable Development', 'Regional Digital Economy', 'Economic Integration', and 'Changing Demographics'. These are all part of the 'ASEAN Regional Framework'.

ASEAN

Industry
Co-funded with: National University of Singapore

Industry Lead Experts: Seowun Park

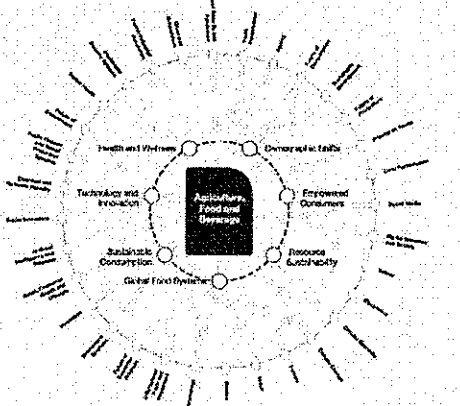
The 10 countries that make up the Association of Southeast Asian Nations (ASEAN) collectively form the seventh largest economy in the world. Brunei, Darussalam, Cambodia, Indonesia, Laos, People's Democratic Republic of Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Viet Nam boasted a combined GDP of roughly \$2.6 trillion as of 2016, and a population of about 610 million. The establishment of the ASEAN Economic Community, in 2015, was designed to more closely facilitate a regional, single market. To realize the potential of the trading bloc, ASEAN member states must navigate delicate geopolitical considerations, promote inclusive growth, ensure sustainable development and seek to forge a common identity.

This briefing is based on the views of a wide range of experts from the World Economic Forum's Expert Network and is created in partnership with Professor Seowun Park a Harvard and Associate Professor at the Business School of the National University of Singapore.

Key Issues

- New Business Models
- Inclusive Growth and Sustainable Development
- Regional Digital Economy
- Economic Integration
- Changing Demographics

AGRICULTURE, FOOD & BEVERAGE



The diagram shows a central 'Agriculture, Food and Beverage' box surrounded by six key areas: 'Health and Well-being', 'Empowered Consumers', 'Resource Sustainability', 'Global Food Systems', 'Technology and Innovation', and 'Sustainable Consumption'. These are all part of the 'Agriculture, Food and Beverage' framework.

Agriculture, Food and Beverage

Industry
Co-funded with: National University of Singapore


Industry Lead Experts: Seowun Park

The global population is expected to increase from about 7.6 billion to nearly 10 billion by 2050, and demand for goods to be used as food for humans and animals may grow to roughly 3 billion tonnes by that year, from about 2 billion tonnes as of 2005. The world's agricultural systems must address the issue of increasingly scarce water and land resources, while grappling with volatility in terms of climate and food prices. In addition, food companies must adjust to existing consumption patterns, which play a specific role in protecting health and ...

Key Issues

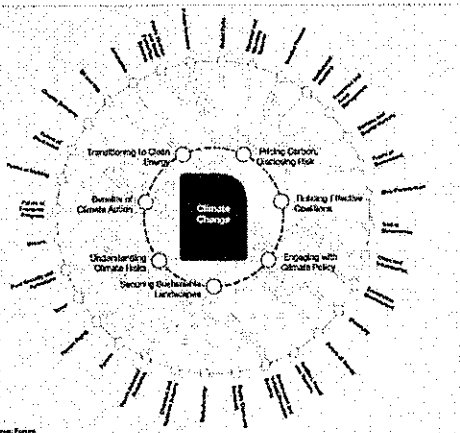
- Demographic Shifts
- Empowered Consumers
- Technological Innovation
- Global Food Systems
- Sustainable Consumption
- Health and Well-being

METHOD 1: IDENTIFY THE ISSUE & UNDERSTAND THE CONNECTIONS



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& RESEARCH CENTRE**

CLIMATE CHANGE



Climate Change

Good House
Communications, York University

Summary Feed Status: Good House Profile

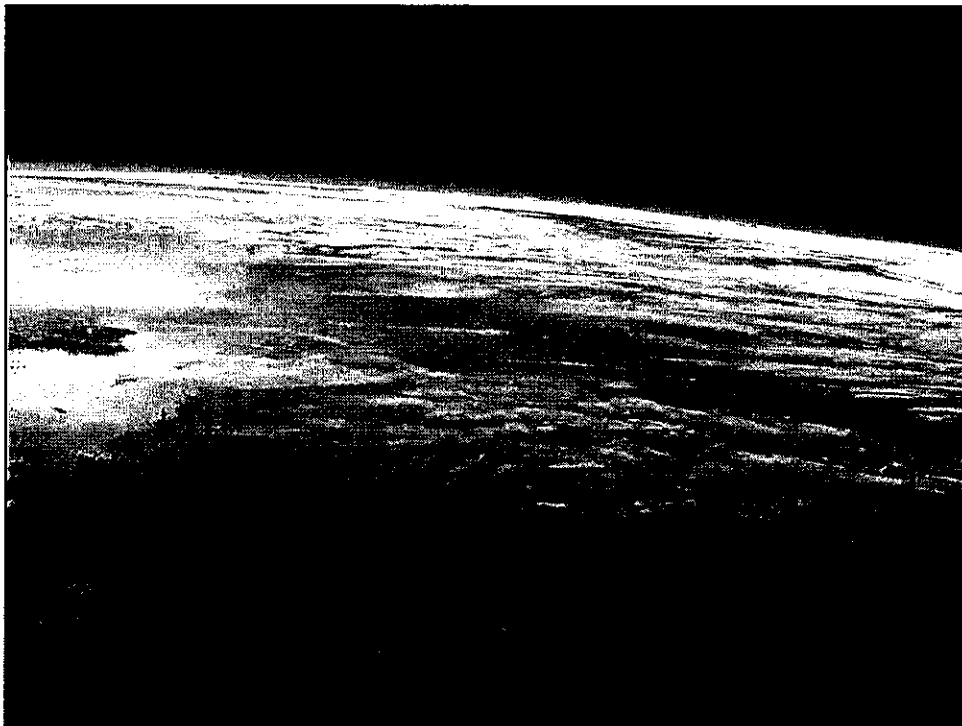
The Paris Agreement, a highly heralded international initiative designed to limit global warming to well below 2°C above pre-industrial levels, entered into force in 2016 - through the US, one of the world's biggest producers of carbon dioxide emissions, has since withdrawn from the arrangement. Climate scientists have long warned that in order to have a reasonable chance of limiting or offsetting the degree of climate change, the concentration of carbon dioxide in the atmosphere should remain below 350 parts per million. In 2018, the highest year on record, the 400 parts per million threshold was crossed for the first time, highlighting the urgent need for accelerated climate action leaving all global stakeholders, including governments, businesses and our society.

This briefing is based on the views of a wide range of experts from the World Economic Forum's Expert Network and is created in partnership with York University.

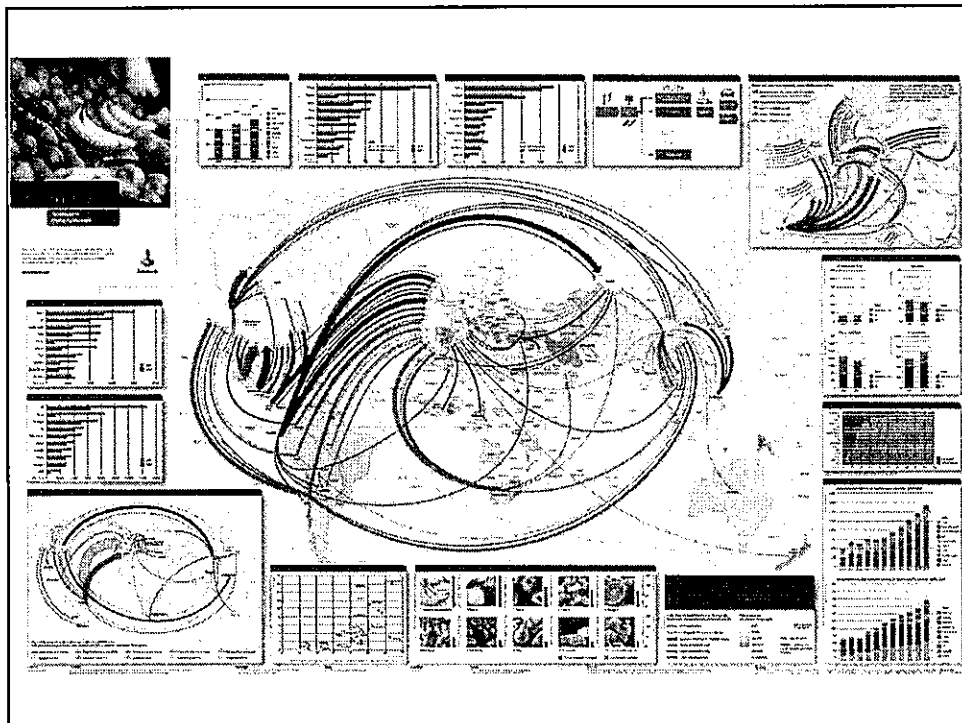
Key Issues

- Pricing Carbon, Decarbonising Tech
- Building Effective Coalitions
- Engaging with Climate Policy
- Securing Sustainable Livelihoods
- Understanding Climate Risks
- Transitioning to Clean Energy

BUT NOT ALL CONNECTIONS (&/OR
CLUSTERS OF CONNECTED ISSUES)
ARE EQUALLY IMPORTANT
EVERYWHERE



METHOD 2: ANALYSE THE DATA




ONLY WAY TO MAKE SENSE OF
CONNECTIONS & DATA IS IN
CONTEXT OF THE SYSTEM
(WHATEVER THAT LOOKS LIKE)









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GLOBAL COMPETITIVENESS REPORT

- Increasing understanding of ways of comparing economies
- Global Competitiveness Report identifies 3 stages:
 1. Factor driven economies
 2. Efficiency driven economies
 3. Innovation-driven economies
- Provides greater opportunity for comparison of policy instruments

Factor driven economies – need basic requirements such as institutions, infrastructure, macroeconomic stability & health & primary education

Efficiency-driven economies – need efficiency enhancers such as higher education & training, market efficiency, financial market sophistication, technological readiness, market size

Innovation-driven economies – need innovation & sophistication factors

New Zealand

13th / 137

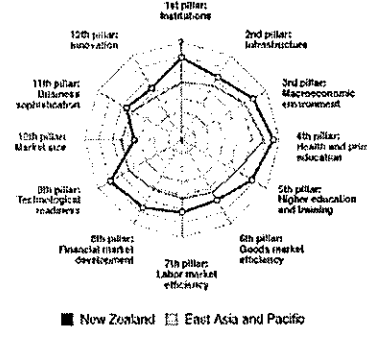
The Global Competitiveness Index 2017-2018 edition WORLD ECONOMIC FORUM

Key Indicators, 2016 Source: International Monetary Fund, World Economic Outlook Database (April 2017)

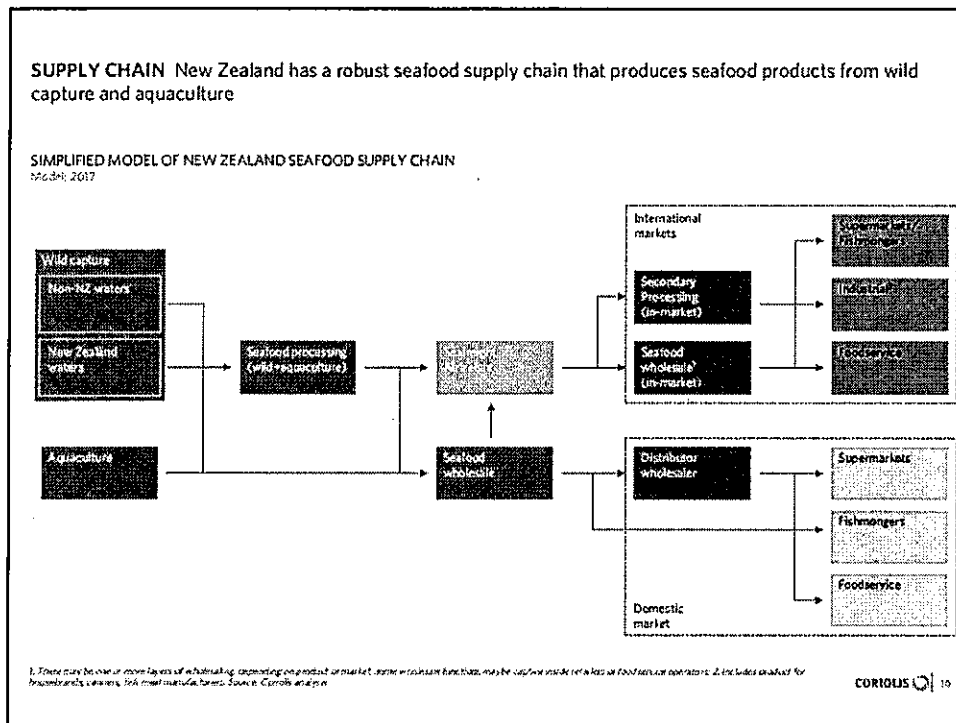
Population millions	4.7	GDP per capita US\$	38,345.4
GDP US\$ billions	182.0	GDP (PPP) % world GDP	0.15

Performance overview

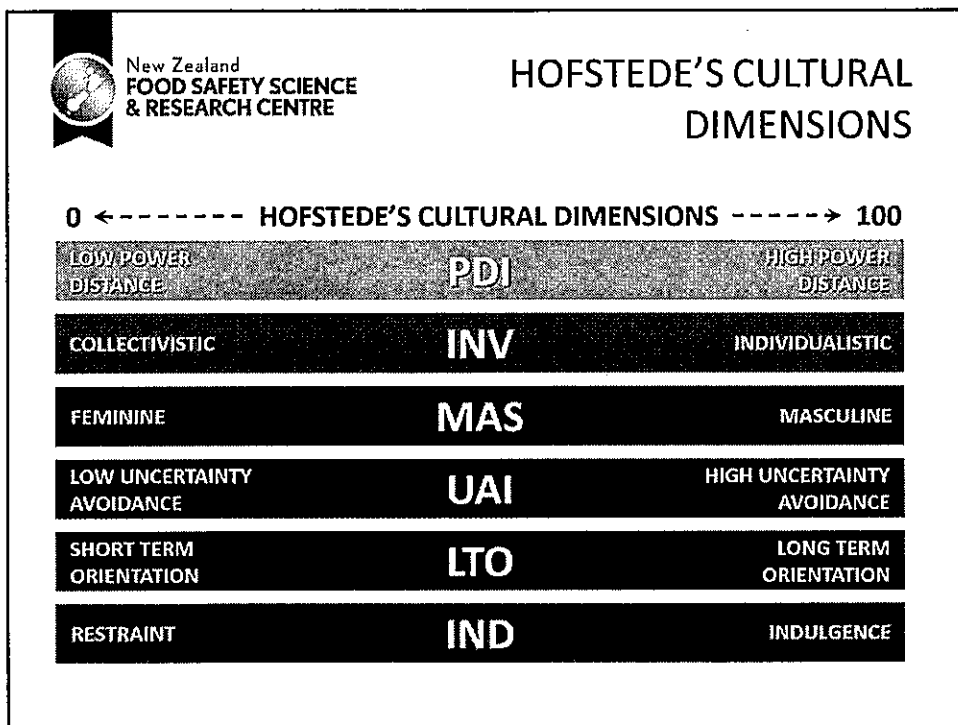
Index Component	Rank/137	Score (1-7)	Trend	Distance from best	Edison	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Global Competitiveness Index	13	5.4			Rank	23 / 134	18 / 148	17 / 144	16 / 140	13 / 128	13 / 137
Subindex A: Basic requirements						Score					
1st pillar: Institutions	3	6.1				5.1	5.1	5.2	5.3	5.3	5.4
4-4-2nd pillar: Infrastructure	23	5.5									
3rd pillar: Macroeconomic environment	16	6.1									
4th pillar: Health and primary education	6	6.6									
Subindex B: Efficiency enhancers						Score					
5th pillar: Higher education and training	7	6.0									
6th pillar: Goods market efficiency	9	5.9									
7th pillar: Labor market efficiency	5	5.6									
8th pillar: Financial market development	1	5.8									
9th pillar: Technological readiness	13	6.1									
10th pillar: Market size	64	3.9									
Subindex C: Innovation and sophistication factors						Score					
11th pillar: Business sophistication	24	4.9									
12th pillar: Innovation	20	4.7									



■ New Zealand □ East Asia and Pacific



QUANT ANALYSIS DOESN'T TELL
THE WHOLE STORY...



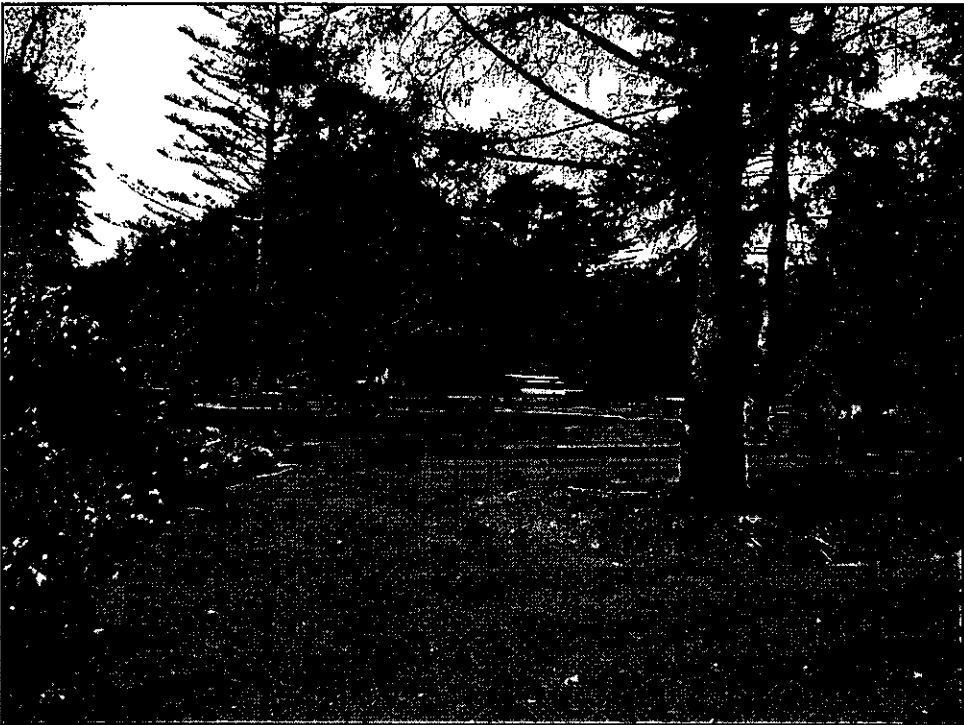
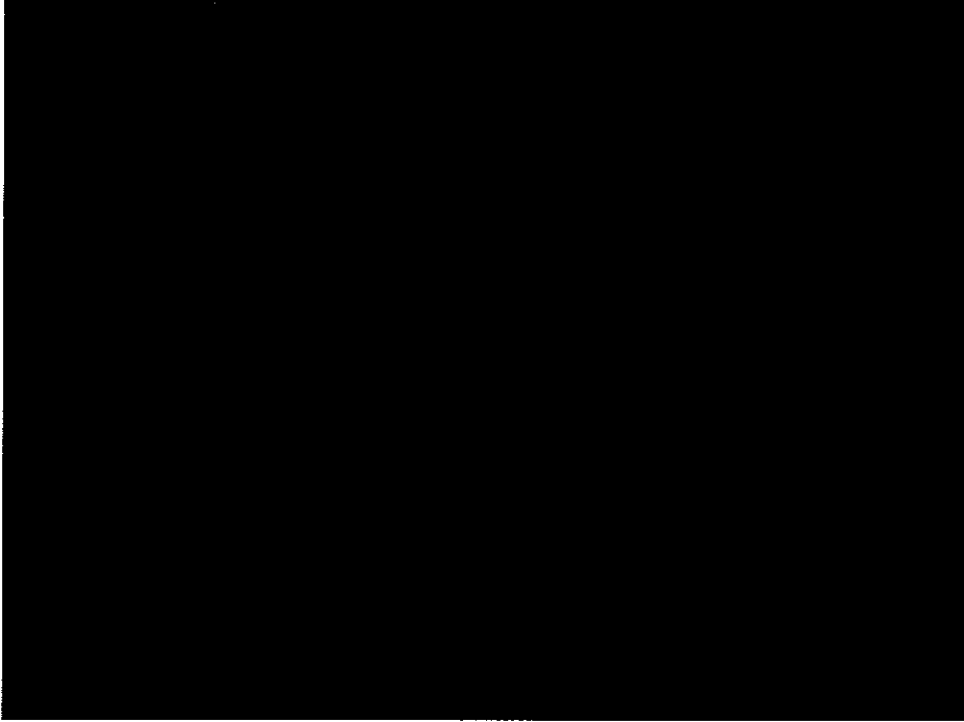
ANHOLT'S GOOD COUNTRY INDEX

The Good Country Index, a new way of looking at the world

We're not making moral judgments about countries. What we mean by a Good Country is something much simpler: it's a country that contributes to the greater good of humanity. A country that serves the interests of its own people, but without harming - and preferably by assisting - the interests of people in other countries too.

The idea of the Good Country Index is simple to measure what each country on earth contributes to the common good of humanity, and what it takes away, relative to its size. Using a wide range of data from the UN, and other international organisations, we've given each country a balance sheet to show at a glance whether it's a net creditor to mankind, a burden on the planet, or something in between.

The Good Country Index is one of a series of projects we'll be launching over the coming months and years to start a global debate about what countries are really for. Do they exist purely to serve the interests of their own politicians, businesses and citizens, or are they actively working for all of humanity and the whole planet? The debate is a critical one, because if the first answer is the correct one, we're all in deep trouble.





Creating conducive policy & regulatory environments for MSMEs

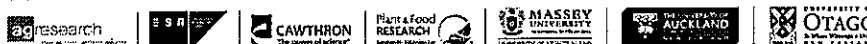
Professor Claire Massey
Massey University & the NZFSSRC

Workshop: Developing a Best Practice Global Value Chain Framework for Fisheries MSMEs
Port Moresby, May 18-19, 2018

FUNDERS:



COLLABORATING PARTNERS:

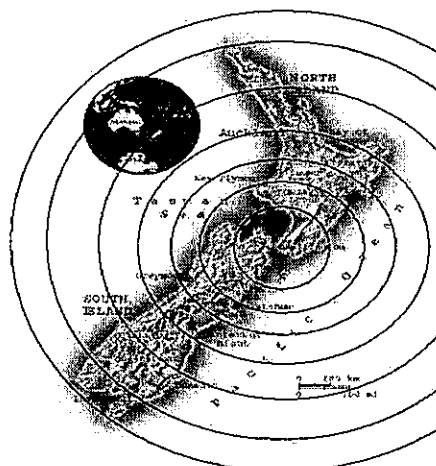




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A PERSPECTIVE FROM NEW ZEALAND

- Modern, deregulated economy, oriented towards Asia & Pacific, dependent on exports (mainly from agricultural products & tourism)
- Population 4.7 m
- Land area 270,000 sq km
- First settlers indigenous people (Maori) - now 15% of population
- European settlement since 1830s – now 80% of population
- More recent immigrants from Pacific Islands (6% of pop.) & Asia (7% of pop.)



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POLICY FOR SMEs

- Strong awareness of importance of SMEs – based on historical dependence on farms as “backbone of the economy”
- Prior to 1984 main approach was protectionism (through tariffs & subsidies) ; economy then dramatically deregulated
- Focus shifted to ‘economic transformation’; improving levels of
 - Growth & innovation (in biotechnology, ICT & creative industries)
 - Exporting
 - Productivity (the WPWG)
 - Management capability (the BCP)
- Also attention being paid to reducing compliance costs & improving access to business-related information



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INSTITUTIONAL FRAMEWORK

- Banking & regulatory sector mature (though VC market weak)
- Transport network comprehensive (though key challenge is improving telecommunications coverage)
- Government agencies have clearly defined responsibilities
 - Ministry of Business, Innovation & Employment (policy focus)
 - New Zealand Trade & Enterprise (programmes)
 - Also, Ministry of Foreign Affairs & Trade, Ministry of Maori Development, Statistics NZ, Inland Revenue Department, Ministry of Education
- Network of Economic Development Agencies & other NGOs
- Minister with responsibility for Small Business (outside cabinet)

AND THIS MEANS WHAT?

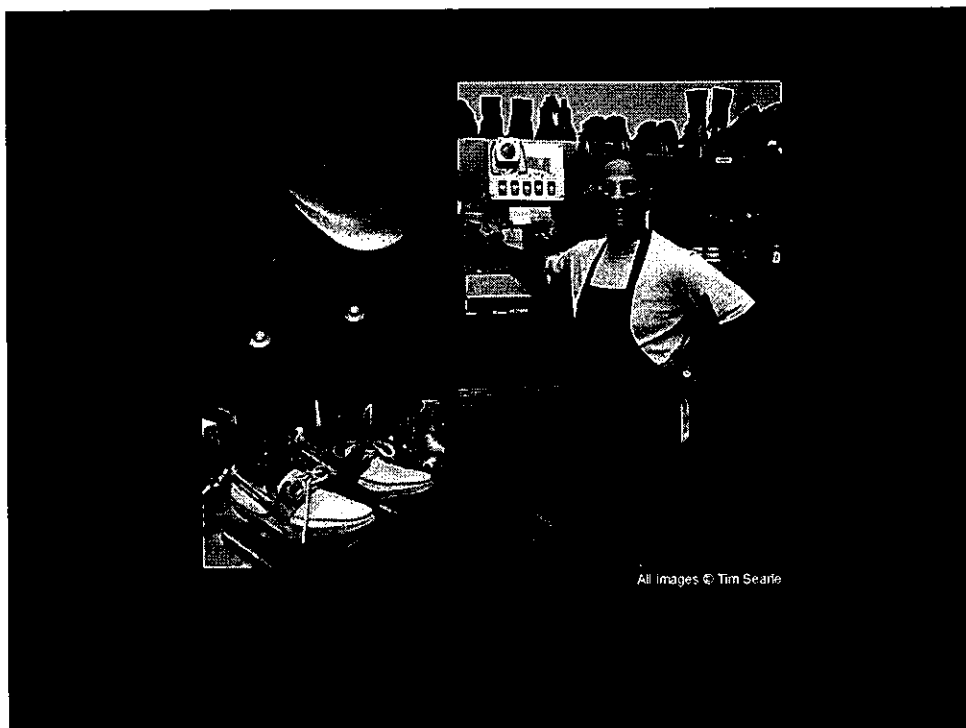
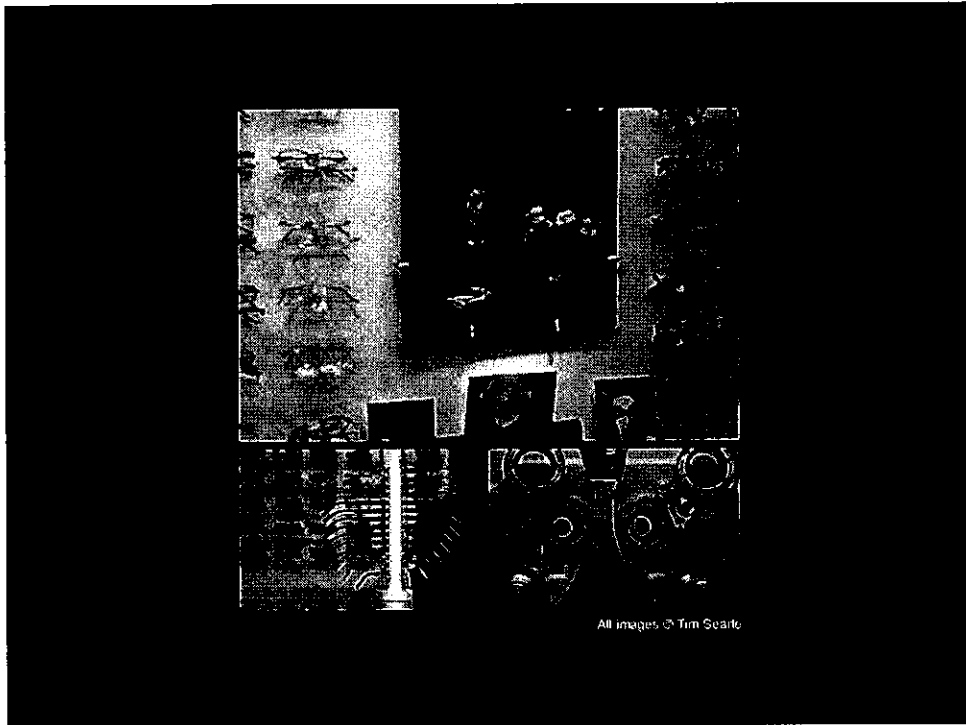


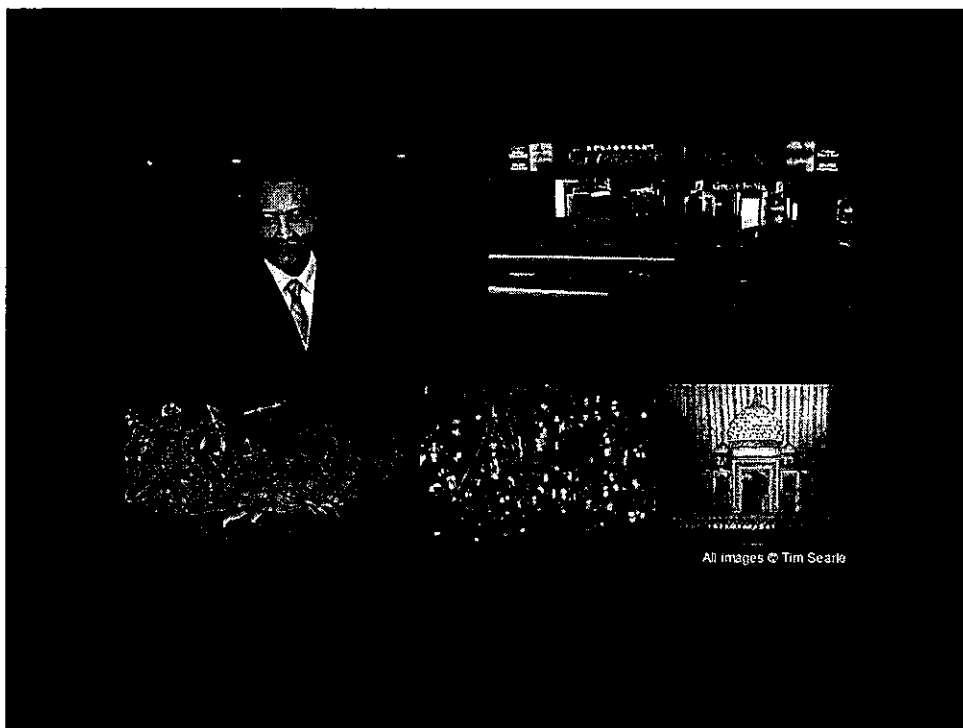
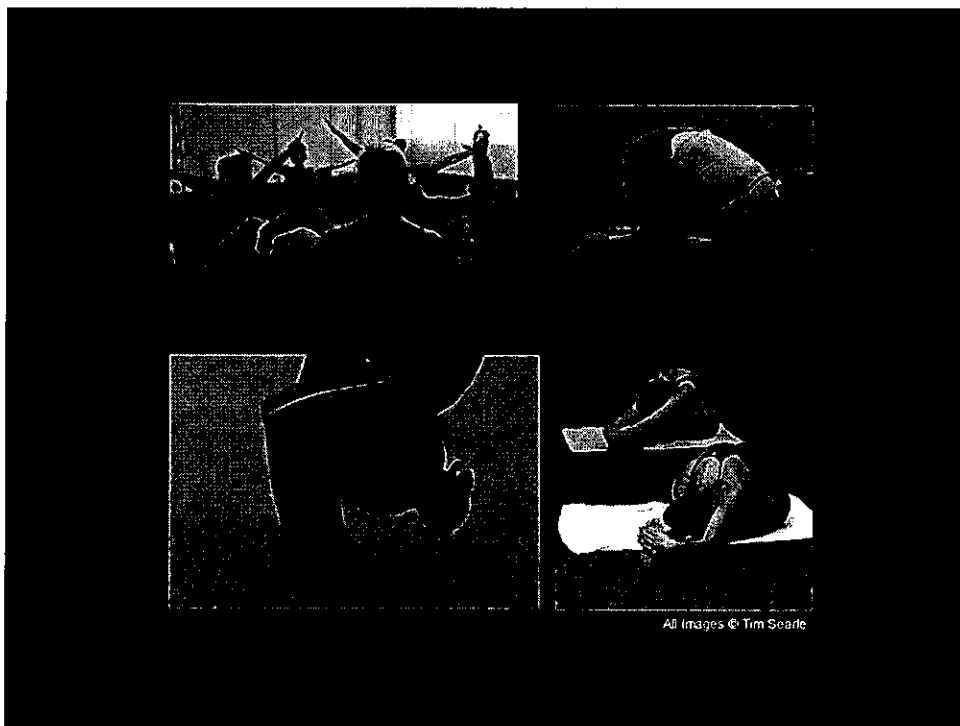
New Zealand
**FOOD SAFETY SCIENCE
& RESEARCH CENTRE**

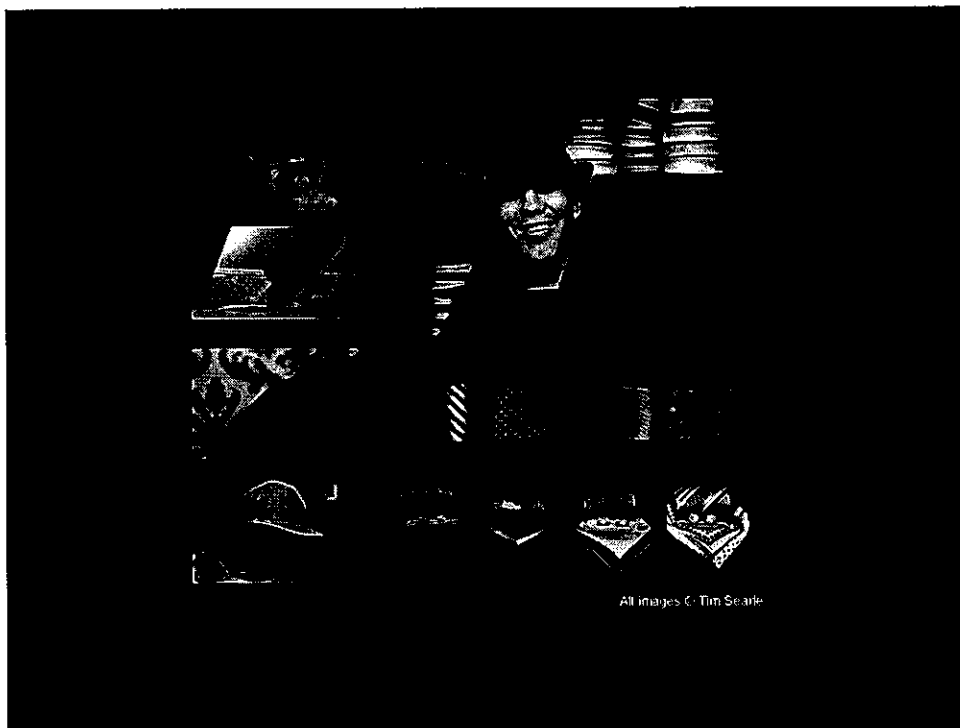
NZ HAS A STRONG PLATFORM & THE OPPORTUNITY

- To take advantage of the increasing understanding of the importance of entrepreneurship/enterprise or innovation
- BUT little agreement on what works when; Economic performance complex to measure – even more difficult to influence
- Insufficient attention paid to the role of behaviour of firm owners in response to policy environment
- Cross-country research (e.g. World Bank study & GEM) offer opportunities to compare different environments to a far greater degree than previously
- Countries are similar to each other in many ways. Also **different** to each other on many dimensions
- Much more work to be done in extending the perimeters of what is relevant to policy – e.g. the role of culture

CULTURE IS ALL ABOUT
PEOPLE





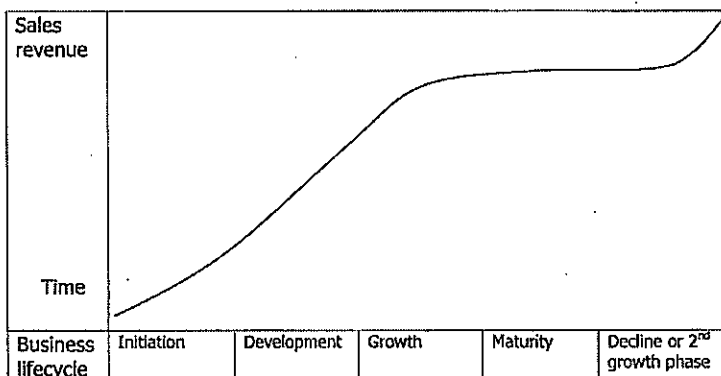


All images © Tim Searle

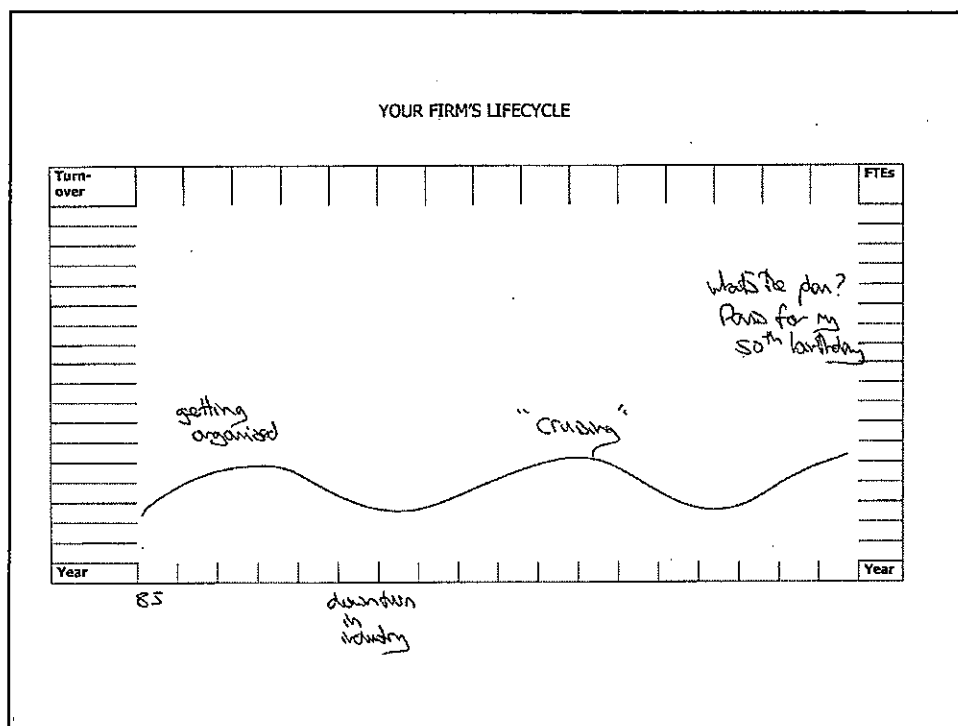


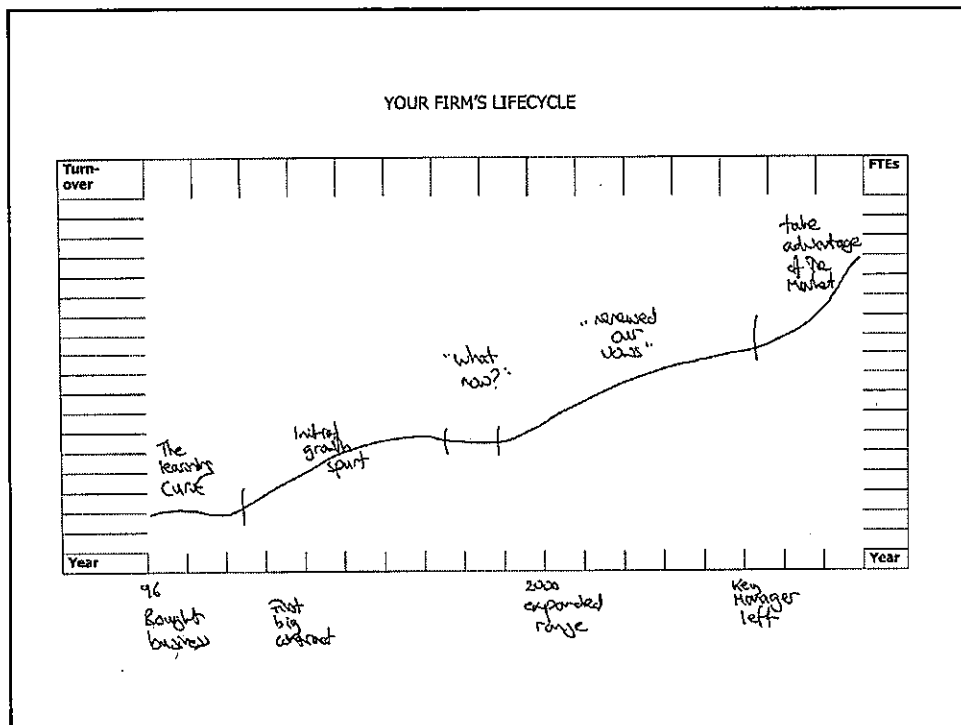
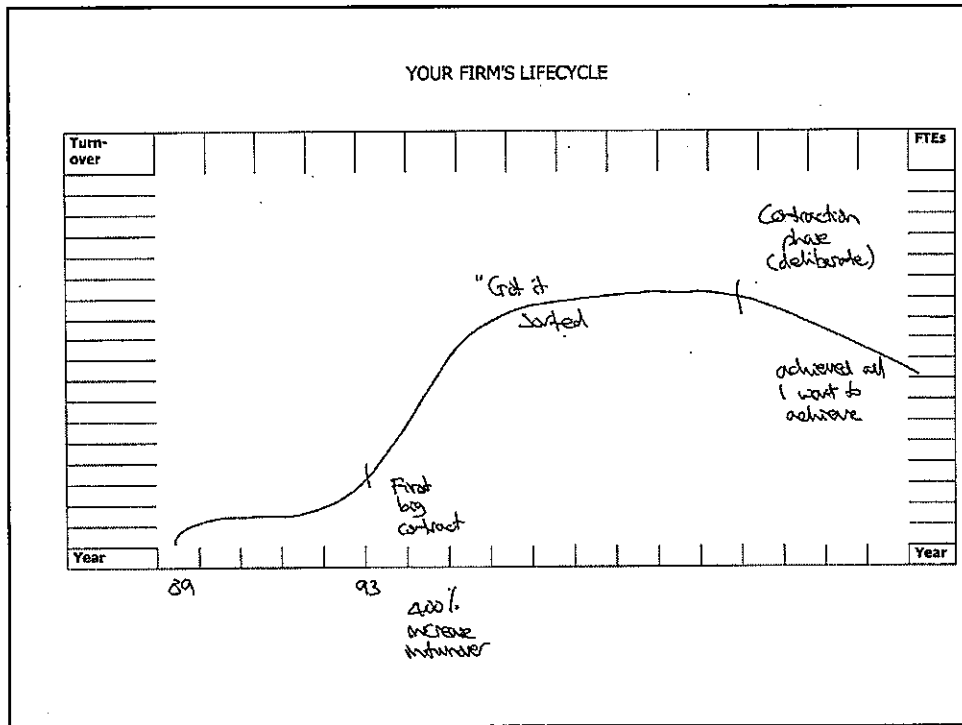
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THE BUSINESS LIFECYCLE



APPLYING THIS MODEL TO THE LIVES OF REAL BUSINESS OWNERS - 3 COMMON PATTERNS

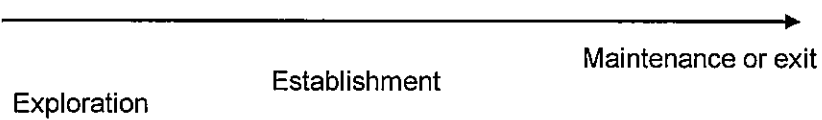


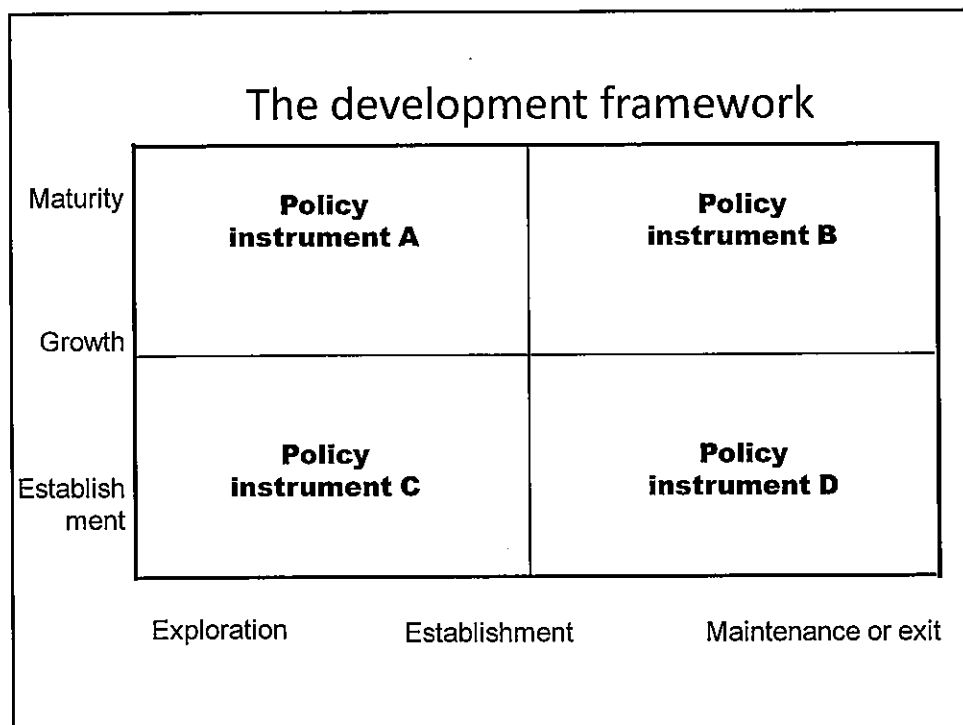
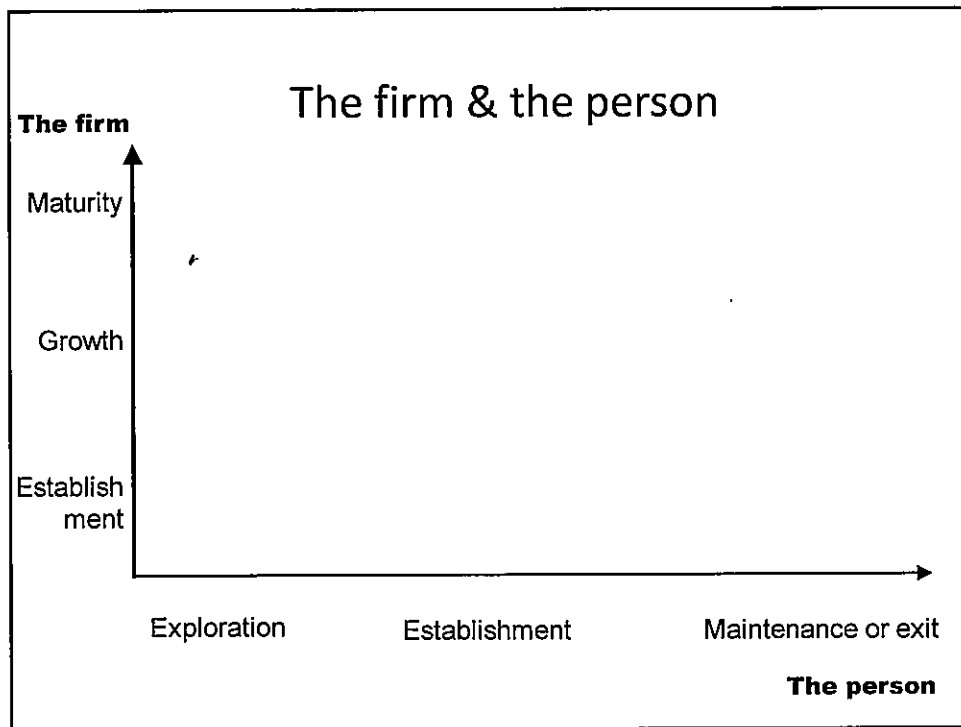


MAKING SENSE OF THESE INDIVIDUAL EXPERIENCES



Dimension 1: the person





The development framework

Maturity	Policy instrument A	Policy instrument B
	Owner with high growth ambitions & development potential (e.g. experience of self employment &/or relevant skills) Firm with little potential for development Policy response? Actively mentor owner to exit firm & establish new firm	Owner with low growth ambitions & development potential (e.g. lack of experience of self employment &/or lack of training) Firm with little potential for development Policy response? None
Growth	Policy instrument C	Policy instrument D
Establishment	Owner with high growth ambitions & development potential (e.g. experience of self employment &/or relevant skills) Firm with high potential for development (e.g. with resources and in an emerging or surging market) Policy response? Actively mentor owner	Owner with low growth ambitions & development potential (e.g. lack of experience of self employment &/or lack of training) Firm with high potential for development (e.g. with resources and in an emerging or surging market) Policy response? Actively encourage owner to exit through sale
	Exploration	Establishment
		Maintenance or exit

**WHAT DOES THIS MEAN
FOR POLICY?**

Successful policy

- Storey (2000) argues that successful policy-making starts with clear objectives (e.g. reducing unemployment or increasing the number of start-ups) & has evaluation built in
- Relies on
 - accurate data
 - clear thinking
 - an awareness of reality of SMEs
 - an environment where there is an acknowledged link between all aspects of the situation (PEST) & the appropriate response(s)

Key debates & challenges

- Leaving aside areas of debate, still uncertainty in terms of practice:
 - Targeting: what works, when & for what firms
 - Delivery (what institutions)
 - Funding
 - Value to individual firm & to broader society
- Result is often confusion, overlap & poor allocation of resources

Policy for the 21st century?

- Clear thinking does matter:
- Priorities change over time:
- Resource constraints a reality:
- Policy is made in a context (political, social, cultural):
- Identifying underpinning assumptions /worldview helps:
- Need to set SMART objectives
- Need to minimise policy lag
- But cannot drive policy
- No single answer will be effective for all countries
- Is SME policy designed to redress imbalances or because the sector offers the best option of addressing objectives?

Conclusions

- There are a variety of “development pathways” for firms in different industries and run by different people
- There are different roles for the parties to economic transformation
- Traditional models (like the business lifecycle) have their place – but they are limiting
- In the context of small firms this cannot be allowed to continue
- There are very few firms in quadrant B – i.e. where a nil policy response is acceptable
- New Zealand deserves better.

A well-known Maori proverb provides an answer to the question “He aha te mea nui o te Ao”

(what is the most important thing in this world?)

The answer is obvious - He tangata, he tangata, he tangata

(it is people, it is people, it is people)



New Zealand
FOOD SAFETY SCIENCE
& RESEARCH CENTRE

FINAL THOUGHTS

- The New Zealand case can be summed up by the term “number 8 wire”. This image encapsulates the environment (distant from resources and markets) as well as the individual (inventive & individualistic)
- Learning more about the key images that epitomise each culture may be the most important thing that researchers – and policy makers can do



And the problem is?



Issue 1: A reality gap?

- The "above average driver" syndrome

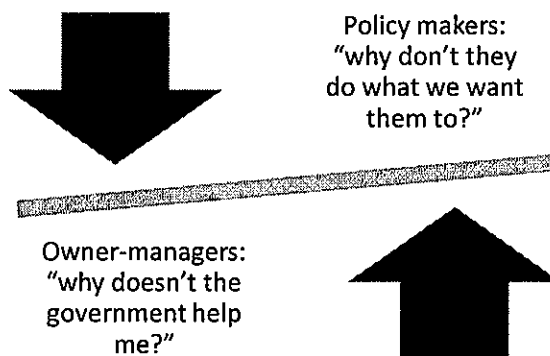


Issue 2: A lack of capability/ambition?

- The issue is the firm owner:
- "He/she is not capable or ambitious enough"



Issue 3: A problem of perspective?



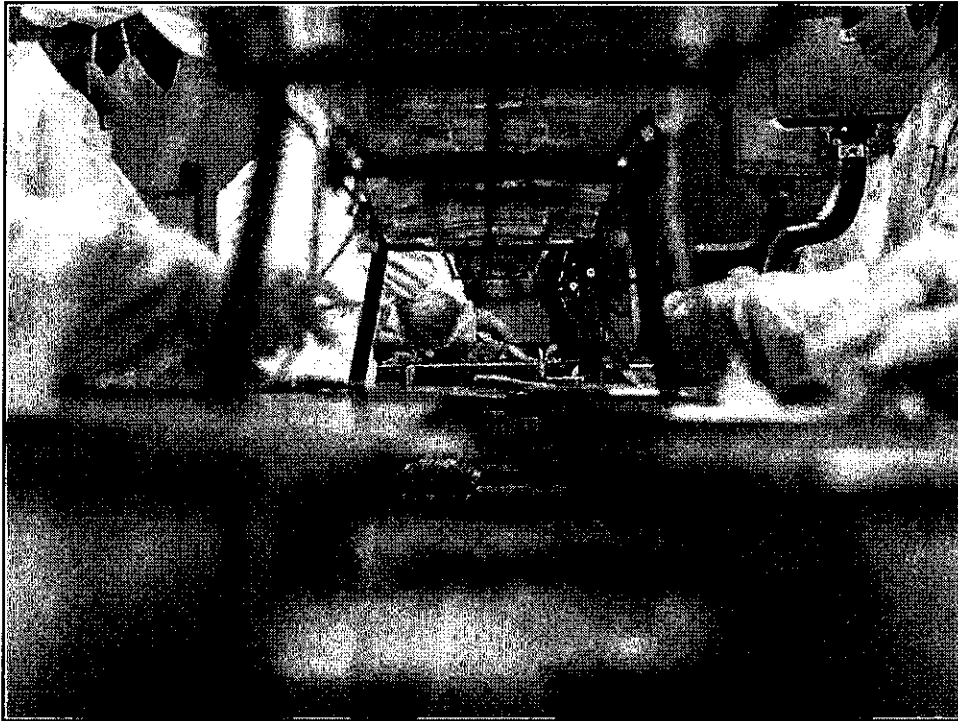
Two perspectives on targeting

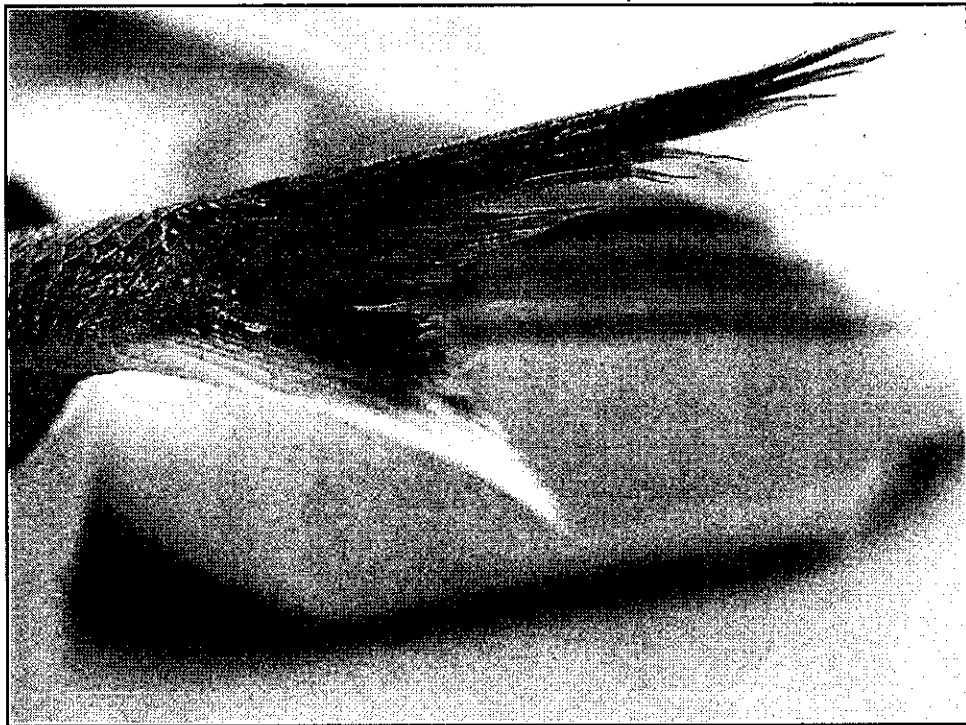


Concluding comments

- Current debate on growth (value of it as well as strategies to achieve it) unsatisfactory
- Discourse needs to move beyond the assumption that behaviour can be influenced by moral imperative
- Dialogue impossible without shared goals, language & collective will
- Achieving objectives only possible with ambition, capability & application of resources







Partnerships (PPP+) in Fisheries MSME



Bill Downing – 18th June 2018

This presentation

- Current thinking on multi sector partnerships;
- Frameworks;
- Partnerships within APEC;
- Policy recommendation;
- Questions

Partnerships – current thinking



recognizes multi-stakeholder partnerships as important vehicles for mobilizing and sharing knowledge, expertise, technologies and financial resources to support the achievement of the sustainable development goals in all countries, particularly developing countries.

encourage and promote effective public, public-private and civil society partnerships, building on the experience and resourcing strategies of partnerships.



a framework – that while engaging the private sector – acknowledges and structures the role for government in ensuring that **social obligations** are met and successful sector reforms and public sector investment achieved.



Over the past five years, the World Economic Forum's New Vision for Agriculture (NVA) initiative has supported leaders in 19 countries across Asia, Africa and Latin America to develop action-oriented partnerships on the ground. These partnerships have mobilized over \$10.5 billion in investment commitments, of which \$1.9 billion has been implemented to date, benefiting 9.6 million farmers.

Frameworks

- Many and varied but similar elements ⁽¹⁾:
 - A common agenda on and agreement about what change is desired;
 - Alignment of interests around that agenda;
 - Competency based role clarity with incentives designed to reward these roles;
 - Share risks fairly among partners and include risk management mechanisms to protect the most vulnerable;
 - Collective action to foster inclusion and to reduce transaction costs;
 - Effective management, support and monitoring and evaluation systems

(1) FAO – review of 70 PPP's

Partnerships within APEC

National Aquaculture Development strategy in Timor Leste

- Aquaculture
 - identified by the Government as means of diversifying livelihoods
- National Aquaculture Development strategy (NADS) 2012 -2030 to:
 - improve food and nutrition security;
 - diversify livelihoods;
 - contribute to economic growth
- Multi dimensional (commercial and small scale)
- Partnership approach embedded in NADS

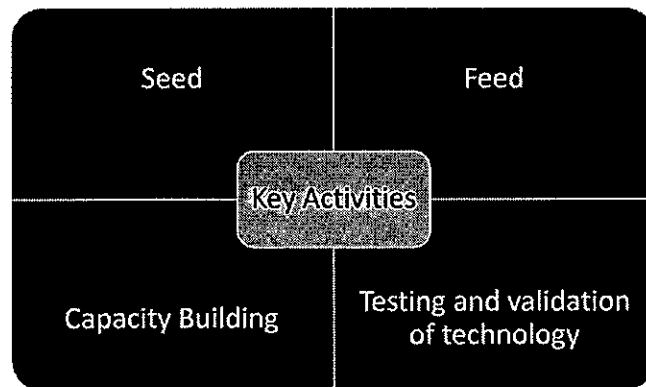
Partnerships within APEC

National Aquaculture Development strategy in Timor Leste

Partner	Organisation
Farmers	Community /farmer groups
Global research institution	Worldfish
I/NGO's	Mercy Corp and HIVOS
Government agency	Ministry of Agriculture and Fisheries
Private Sector	Suppliers – KMANEK and DILIMART

Partnerships within APEC

National Aquaculture Development strategy in Timor Leste



Partnerships within APEC

National Aquaculture Development strategy in Timor Leste

- **Critical success factors**
 - Alignment with government policy and strategy;
 - Reason to be involved by stakeholders;
 - Building on existing simple and low cost livelihood technology;
 - Participatory approaches to engaging stakeholders;
 - Strong market forces – growing demand for outputs and inputs, high prices
 - Research and learning focus

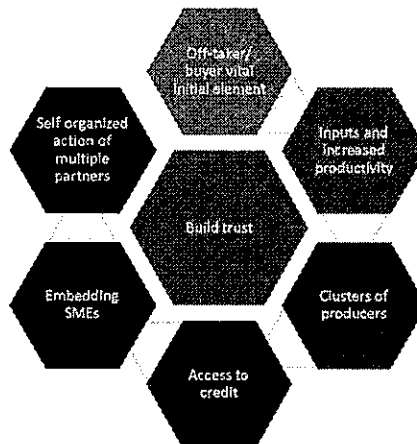
Partnerships within APEC



- Country based multi stakeholder partnership platform that catalyses action on inclusive and sustainable agricultural development in South East Asia
- Each country has Working Groups focused on targeted value chains;
- Brings together companies, governments, NGO's and other stakeholders to help smallholder improve their production and livelihoods;

Partnerships within APEC

Grow Asia

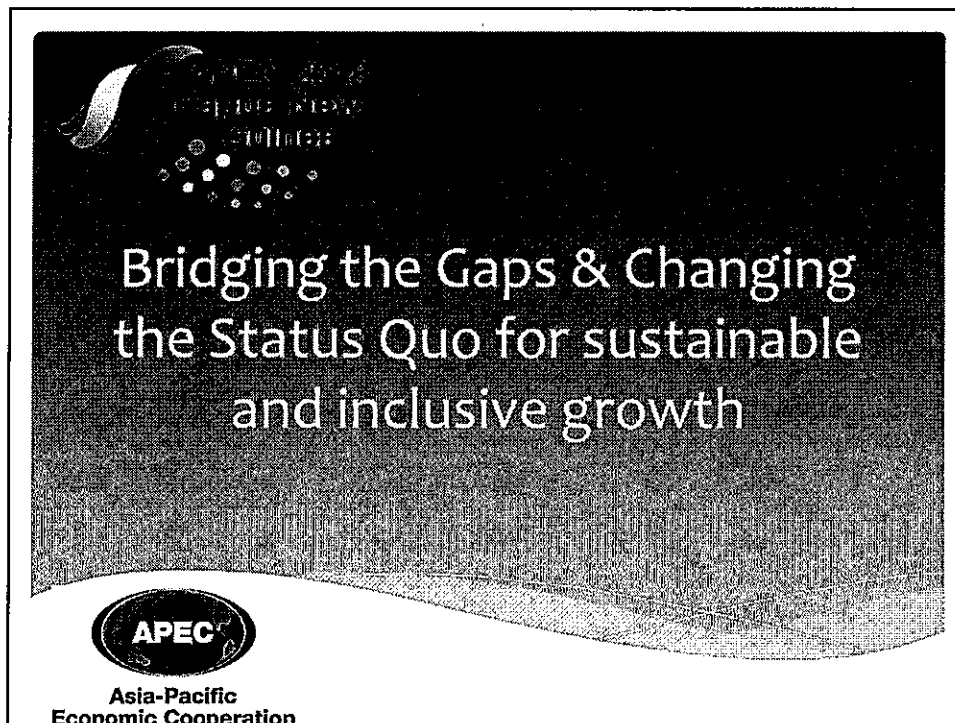


Focus next on improved practices, extend reach, pathways to scale & diversification of partners

Potential policy recommendation

- Establish a Partnership Strategy to nurture, grow and sustain multi stakeholder partnerships that support inclusive and sustainable value creation for stakeholders in the value chain. The strategy should be supported by platforms and principles that have been co developed by stakeholders and a backbone organization to provide a range of services to ensure the they are effective and meaningful to all.

Questions?

The image shows a slide with a dark background and a light-colored wavy line at the bottom. The title 'Status Quo' is centered in white text.

- * After lunch, we will be discussing the current challenges in the global fisheries value chain that are relevant to MSMEs
- * Various issues may not be relevant to certain economies, but we are hoping to find common themes

Sustainable and Inclusive Growth

- * APEC has a commitment to helping MSMEs be included and successful within the global market
- * This is a very challenging task
- * Governance, practical, financial considerations among others

What are the gaps to inclusive growth?



- * What gaps exist within your economy to incorporating MSMEs into formal value chains?

Capacity Development



Bill Downing – 19th June 2018

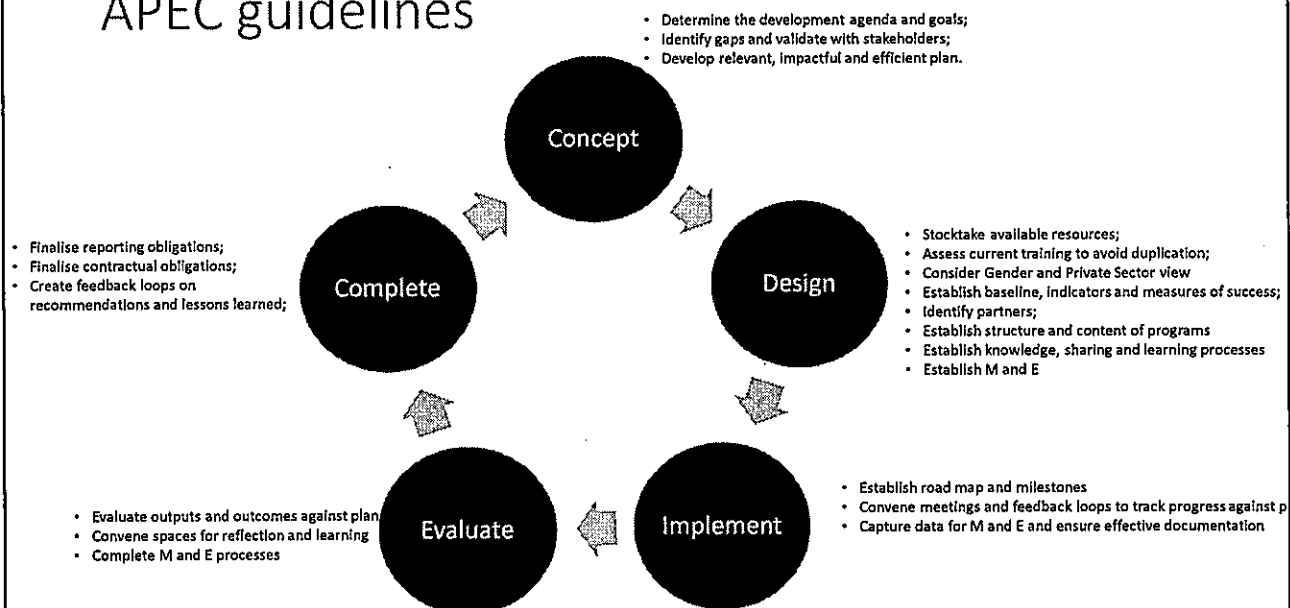
This presentation

- Brainstorming
- APEC guidelines
- Examples
- Policy recommendations

Brainstorming

- What are the important capacities required to create best practice GVC?
- How would you go about building capacities?

APEC guidelines



Capacity Development within APEC

National Aquaculture Development strategy in Timor Leste

Scale	Activity
International	tilapia hatchery and grow out training in AIT Thailand training/mentoring/workshops:
National	<ul style="list-style-type: none"> • Hatchery technology; • Feed formulation; • National Aquaculture Forum; • ToT training –tilapia aquaculture; • Hatchery Database management/online database system
Local	organization of farmers cross visits and facilitation of knowledge, sharing and learning

Potential policy recommendation

- Building capacities is central to the success of a best practice fisheries value chain. Informed by constant and rigorous assessment of existing and required capacities, plans will be designed, implemented, evaluated and adapted to ensure all stakeholders in the value chain have the knowledge, understandings and skills to maximise their participation and contribute to its sustainable and inclusive growth.

Questions?



PROMOTING FISHERIES MSMES


PNG CONTEXT




APEC CONTEXT



- SME Working Group
 - promote development of an enabling environment, foster capacity building for SMEs and enhance synergy with other APEC fora, the private sector and other stakeholders
 - E.g. Framework for SME Activities 1997; Integrated Plan of Action for SME Development 1998/2000; SME Working Group Strategic Plan 2009 – 2012/ 2013 – 2016 & SME Working Group Strategic Plan 2017 – 2020
- APEC Leaders endorsed *APEC Strategic Blueprint for promoting GVC Development & Cooperation* (2014). Welcomed capacity-building for SMEs Integration into GVCs in major industries as part of Leaders' Statement to promote GVCs development and cooperation
- Boracy Action Agenda to globalize MSMEs (2015): Fostering the participation of APEC MSMEs in Regional and Global Markets
- Iloilo Initiative on Growing MSMEs for inclusive development (2015)
- APEC MSME Marketplace – online portal for information and networking for MSMEs within APEC region) – Free to register MSMEs and be included in the MSME Directory (Also have exporters profiles, trade regulations, business opportunities, financing resources, markets, etc.) (www.apecmarketplace.com)




APEC CONTEXT




APEC Asia-Pacific Economic Cooperation

SMEs in the APEC Region

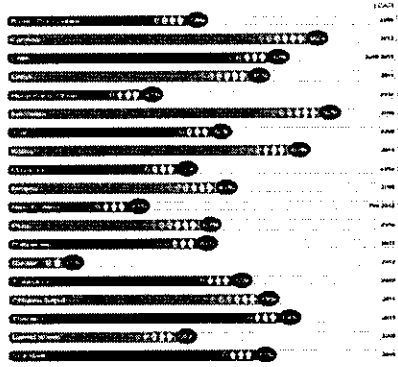
Over 97% of enterprises in APEC economies are SMEs



The economic contribution of SMEs varies across APEC members





SMEs account for a significant portion of employment




Definition of SMEs varies across APEC economies


SME export value as a share of total export value: opportunities for growth

APEC Policy Support Unit, Policy Brief No. 6 - SMEs in the APEC Region, December 2013.



PNG CONTEXT



- Total Population: 8.42 million (2018)
 - > Largely Rural & Subsistence based population
- Population Growth: 2.1% annual change (2016)
- GDP per capita ratio: USD 2, 182.72 (2014)
 - > Insignificant contributions by MSMES (fisheries)
 - > But significant contributor to livelihood support (black market economy)
- Literacy Rate: 57.3% (2000) to 63.4% (Adult 15+)
 - > Contributes to large informal sector??
- Life expectancy: 65.54 years (2016)
 - Labour force
- Boiling pot of culture/diversity (JM 2018) - 800+ languages and more than 1000 tribes



PNG National Policy Framework



- *Vision 2050* – Overarching policy framework (Pillar 2: Wealth Creation)
 - Adding value to and discovery of new products from primary commodities and moving these to industrial production
 - Improving the rate of creation of new businesses including SMEs and small holder farming and fishing enterprises
- PNG National Strategic Plan 2010 – 2030
- Medium Term Development Plans 2010 – 2015; MTDP II 2016 – 2017 (Current: MTDP III 2018 – 2022)
- National Strategy for Responsible Sustainable Development (2014) – Green, Sustainable & Innovative Growth (including for MSMEs)
- *PNG SME Policy 2016: Projections*
 - SME growth: 49, 500 to 500, 000 by 2030
 - Employment: Increase from 291, 348 to 2, 000, 000 by 2030 (SME Policy)
 - Income per capita: Rise from current \$2,000 to US\$ 9, 600
 - GDP Contribution: Increase from current 6% to 50% by 2030
- ❖ ARE THESE POLICIES WORKING?? IF NOT WHY??



Defining Fisheries MSMEs



APEC: No common regional definition. Most economies use number of employees as a criterion (vary considerably from 20 employees in NZ to 1000 employees in China).

PNG

	Micro	Small	Medium
Annual Sales turnover	<K200,000	>K200,000 but <K5m	>K5m, <K10m
Employees - MCE	<5	>5, <20	>40, <100
Employees - ATFFO	<5	>5, <40	>40, <100
Total Assets	<K200,000		>K5m, <K10m

(Adopted from *SME Policy 2016*)

- Manufacturing, Construction and Engineering (MCE)
- Agriculture, Tourism, Forestry, Fisheries and Other sectors (ATFFO)



Support Fisheries MSMEs in PNG



- *Fisheries Infrastructure Program*
 - *Wharves and jetties*
 - *Fish Markets and Cold Storage*
- *Micro Credit Facility*
- *Project Development Grants*
- *Aquaculture Projects*
- *Fisheries Cooperatives*
- *Training/Capacity Building*



Challenges in Fisheries MSMEs



- Supply side constraints
- Ease of doing business (banking and credit facilities, transportation services, accessibility to markets)
- High Cost of Doing Business/Economies of Scale
- Synergies policies, regulations and tools: LHS = RHS
- Use of ICT (promotion and marketing)
- Lack of capacity (Entrepreneurs having the required/necessary skills)
- Lack of available data to aid planning (decision support)



Challenges in Fisheries MSMEs Doing Business 2017 PNG (WB 2017)



Doing Business 2017

THE BUSINESS ENVIRONMENT

Figure 3.3 Metrics on Doing Business scores - Papua New Guinea (Data from 2015 survey, base 3, zero edge)

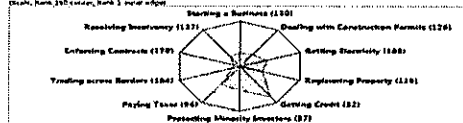
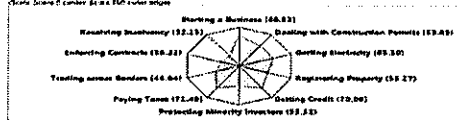


Figure 3.4 Difference in metrics scores (Doing Business Index) - Papua New Guinea (Data from 2015 survey, base 3, zero edge)



Source: Doing Business database
Note: The average score is based on the base 3, zero edge and based on the average of each economic indicator in the 2015 survey. (2015 survey data for 121 economies published by the World Economic Forum). The difference in metrics scores represents an average score equal to the difference between the Doing Business score for the base 3, zero edge and the average score for the metric. The difference in metrics scores is calculated on a scale from 0 to 100, where 0 represents the worst performance and 100 the best. For the 121 economies for which the data is over 1 year, scores are a production weighted average for the 2 years.

- A lot of challenges to **FORMALLY** establish a business – let alone MSMEs in Fisheries



Way Forward



- How do we promote MSMEs into the global Value chain – from informal to Formal??
 - Empower MSMEs through tax exemptions, subsidies, incentives (capitals) for start-ups, etc.
 - Access to credit facilities – appraisal of existing practice
 - Training & Capacity building – PHO, Food Safety, Small Business/ Entrepreneurship (cultural change), etc
 - Partnerships (PPP)
- How do we address barriers to trade and investment that disproportionately impact MSMEs in comparison to larger businesses
 - SPS/Quality/Health Standards
 - Labelling
 - Customs Procedures/ROO
- How do we address supply chain services (utilities) & constraints??
 - Transportation, Banking, Telecommunication, Freight
 - Port Services/Facilities, Cold Storage, access to markets (domestic & international)
- What about Economies of Scale??? ALL of the above??

Capacity Development



Bill Downing – 19th June 2018

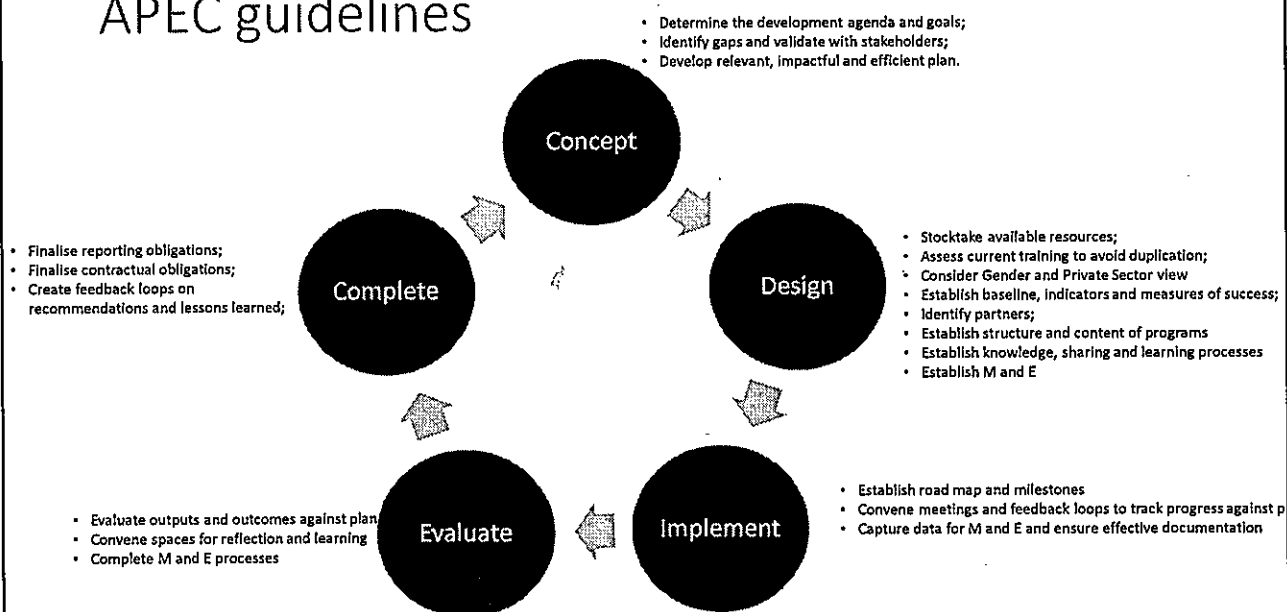
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Capacity Development within APEC

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Questions?



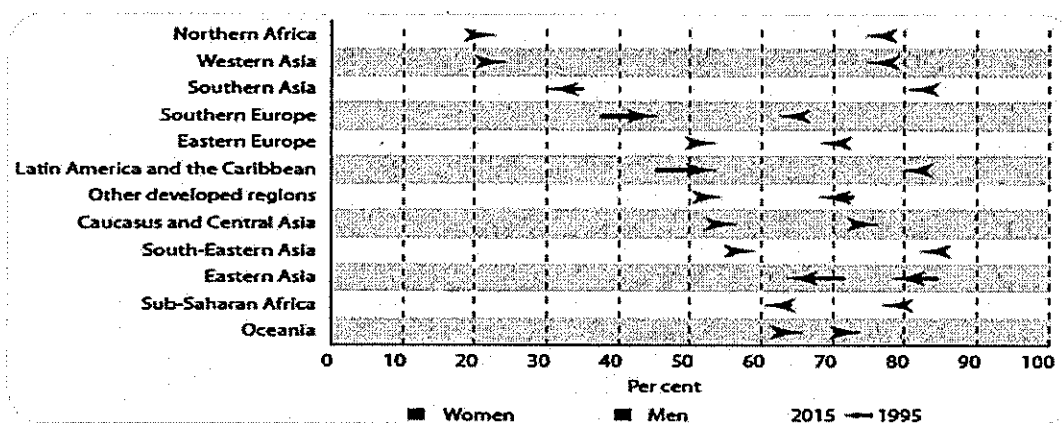
Asia-Pacific
Economic Cooperation
Secretariat

FACILITATE INCLUSIVE GENDER PARTICIPATION IN SME DEVELOPMENT: CREATING AN ENABLING ENVIRONMENT FOR WOMEN-LED BUSINESSES

Irna Sari
Sustainable Fisheries Advisor

Presented in
The Second APEC Senior Officials Meeting (SOM2) and
Related Meetings and MRT
18 - 19 May 2018
Port Moresby, Papua New Guinea.

Women participation rate, aged 15+ years, by region



Source: ILO, Estimates and Projection of the Economically Active Population (EAPEP), 2013 edition

Note: Other developed regions include countries in Northern and Western Europe, Australia, Canada, Japan, New Zealand, and the United State, based on 2015 projection figures.

Aquaculture production by region 2014

Region	Production (thousands of tonnes)	Production share (%)
Africa	1710	2.23
America	3351.6	4.54
Asia	65601.9	88.91
Europe	2930.1	3.97
Oceania	189.2	0.23



FAO, 2016

3 of 18

The biggest capture fisheries producing countries

Countries	Tonnes
China	14811390
Indonesia	6016525
United State	4954467
Russian Federation	4000702
Japan	360364
Peru	1226560
India	341821

Countries	Tonnes
Viet Nam	2711100
Myanmar	2702240
Norway	2301288
Chile	1357586
Philippines	2137350
Korea	1718626
Thailand	1559746
Malaysia	1458126

FAO, 2016

Data of Peru and Chile exclude anchoveta

4 of

World fishers and fish farmers by region

	2000	2005	2010	2012	2014
	(Thousands)				
Africa	4175	4430	5027	5885	5674
Asia	39646	43926	49345	49040	47730
Europe	779	705	662	647	413
Latin America and Caribbean	1774	1907	2185	2251	2444
North America	346	329	324	323	325
Oceania	126	122	124	127	46
World	46846	51418	57667	58272	56632



FAO, 2016

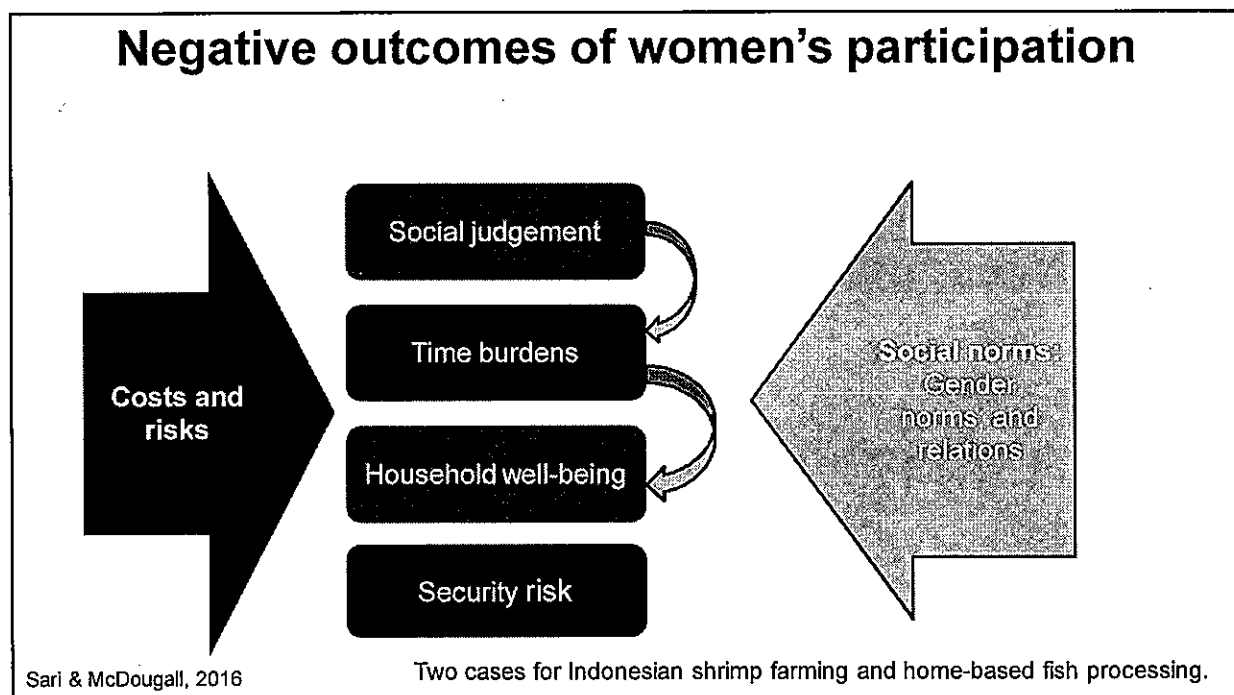
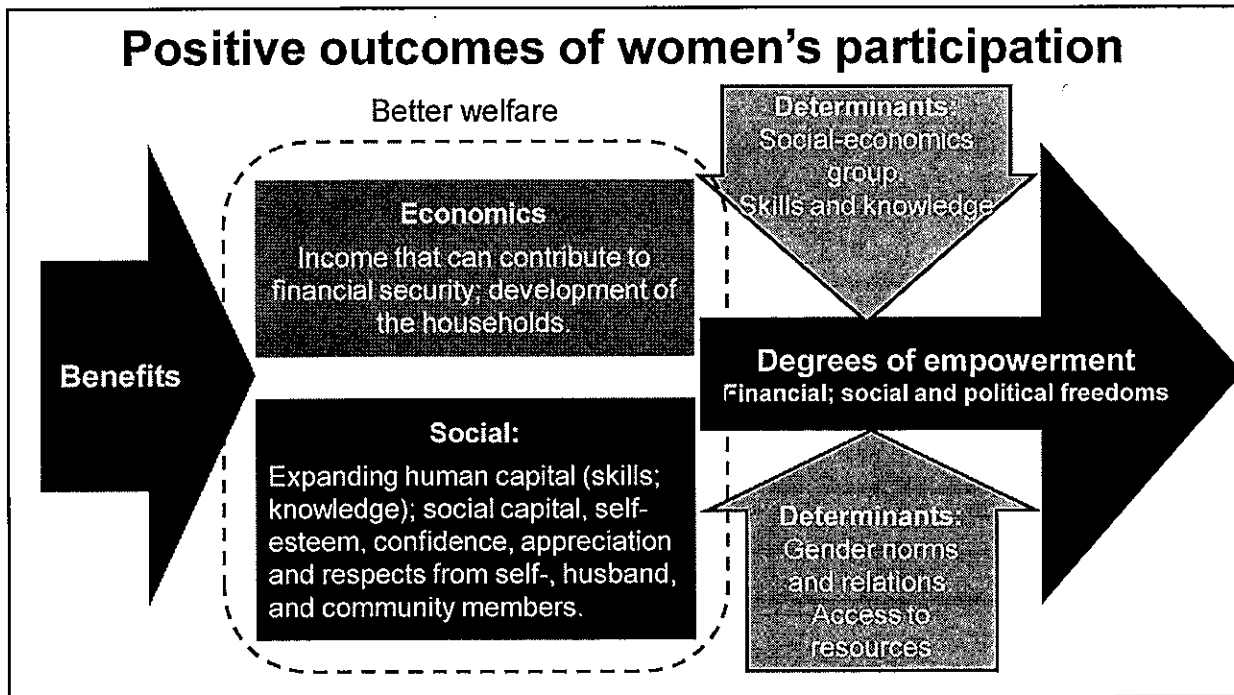
Asia contributes 84% of world labor in fisheries production.

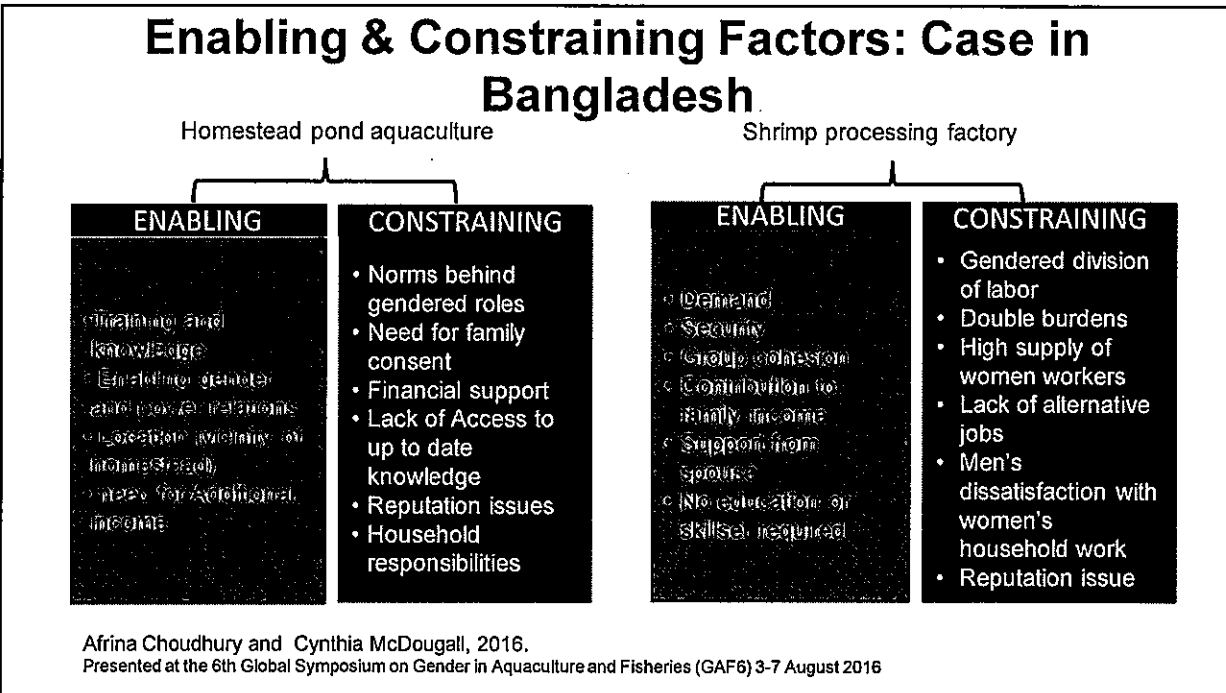
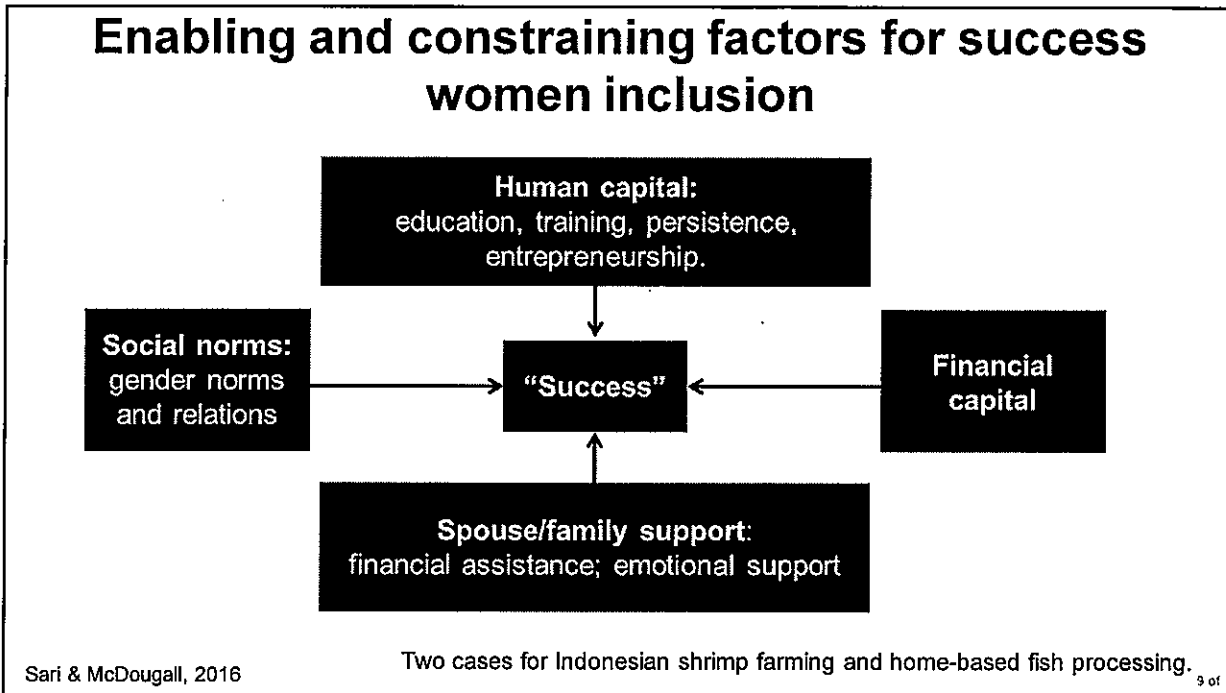
5 of

Stylized participation of women in fisheries, determinants and risks

	Participati on level	Determinants	Risks and cost
Production	***	Access to resources; physical capacity ; Skills, norms.	Physical risk Time
Harvesting	*	Access to resources and capital; physical capacity ; Skills, norms.	Physical risk Time
Marketing	*****	Access to resources and capital. Skills and knowledge.	Business losses Time Physical risk associated
Processing	*****	Skills and access to resources and capital.	Time Physical risk on working conditions
Management and administrative (esp. public sector)	***	Skills, knowledge, access to education, leadership role.	Time; gender relation, working environment
Research	***	Skills, knowledge, access to education, leadership role.	Time, gender relation, working environment.

5





Opportunity and constrains in tuna small-scale fisheries in Bitung

	Opportunities		Constrains	
	Male	Female	Male	Female
Marketing	Market expansion (international and lucrative); higher income		Price fluctuation, market constrains, unregistered products, certification.	
Processing	Product diversification and upgrading, market expansion, knowledge and skills upgrading.		Unstable raw material supplies, weak business group, limited capital, limited skills and awareness on post-harvest handling and food safety, limited skills and knowledge on product branding and technical production.	
Fishing	Supports e.g fishing facilities from related agencies	Additional income (grading)	Low awareness for registering vessels and compliance.	Less participation by women.
Input provision	Operational cost reduction; fishing vessel registration, fishery regulation		Unregistered fishing vessels, difficulty to obtain fishing permits, low knowledge on fishing technology and gear.	Poor product handling and food safety.
	Training	Administering fishing permits, catch logbook/documentation.		

Source: SEAFDEC and USAID-OCEAN, 2018 11 of

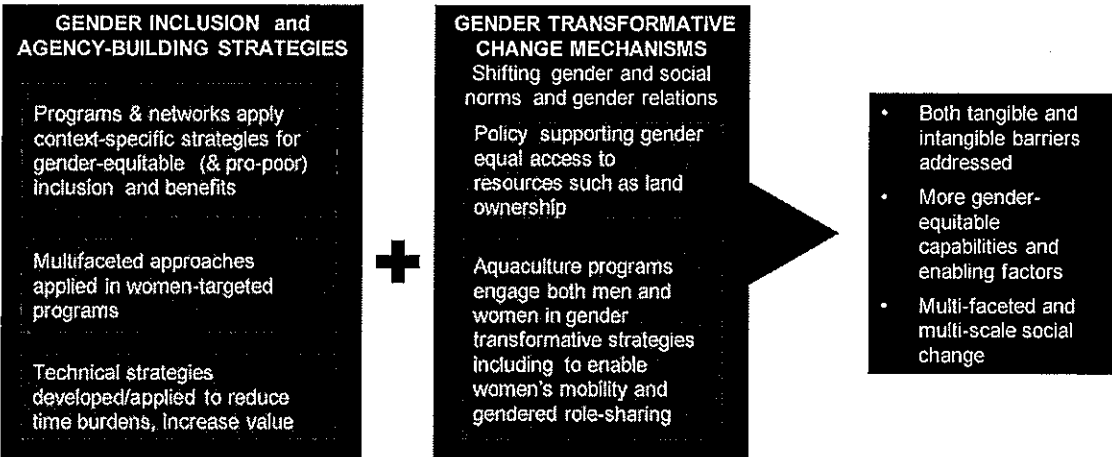
Opportunity and constrains in tuna large-scale fisheries in Bitung

	Opportunities		Constrains	
	Male	Female	Male	Female
Marketing	High demand for tuna and tuna alike, increase employment.		Unstable raw material supplies	
Processing	Employment		Unstable raw material supplies	
				No women group, limited women at senior management level, limited supporting facilities e.g. nursery room, time management.
Fishing	Investment in fishing gears and vessel, increased catch.		Limited capital	
Input provision	Increase employment			Time constrains.

Source: SEAFDEC and USAID-OCEAN, 2018 12 of

Case study for tuna small-scale fisheries in Bitung Indonesia presented in Regional Gender Workshop, 2017

Policy implications and recommendations



13 of

Thank You

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Creating GOOD policy & regulatory environments for MSMEs

Professor Claire Massey
Massey University & the NZFSSRC

Workshop: Developing a Best Practice Global Value Chain Framework for
Fisheries MSMEs
Port Moresby, May 18-19, 2018

FUNDERS:



MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
MŌHIOKI WHAKATĀPAPA

Ministry for Primary Industries
Mātauranga Ahu Matua



COLLABORATING PARTNERS:



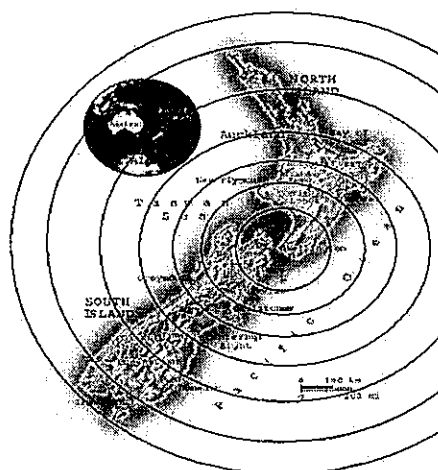
STEP 1: EXAMINE THE CONTEXT
(INFLUENCING THE BEHAVIOUR OF
PEOPLE STARTS HERE...)



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A PERSPECTIVE FROM
NEW ZEALAND

- Modern, deregulated economy, oriented towards Asia & Pacific, dependent on exports (mainly from agricultural products & tourism)
- Population 4.7 m
- Land area 270,000 sq km
- First settlers indigenous people (Maori) - now 15% of population
- European settlement since 1830s – now 80% of population
- More recent immigrants from Pacific Islands (6% of pop.) & Asia (7% of pop.)





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HOFSTEDE'S CULTURAL DIMENSIONS

0 ←----- HOFSTEDE'S CULTURAL DIMENSIONS -----→ 100

LOW POWER DISTANCE	PDI	HIGH POWER DISTANCE
COLLECTIVISTIC	INV	INDIVIDUALISTIC
FEMININE	MAS	MASCULINE
LOW UNCERTAINTY AVOIDANCE	UAI	HIGH UNCERTAINTY AVOIDANCE
SHORT TERM ORIENTATION	LTO	LONG TERM ORIENTATION
RESTRAINT	IND	INDULGENCE

New Zealand

13th / 137

The Global Competitiveness Index 2017-2018 edition



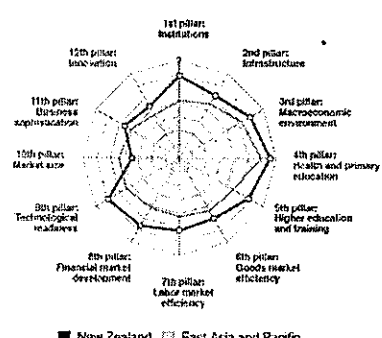
Key indicators, 2016

Source: International Monetary Fund, World Economic Outlook Database (April 2017)

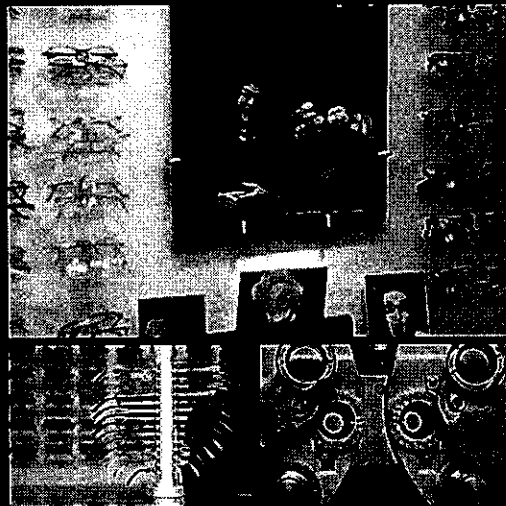
Population millions	4.7	GDP per capita US\$	38,345.4
GDP US\$ billions	182.0	GDP (PPP) % world GDP	0.15

Performance overview

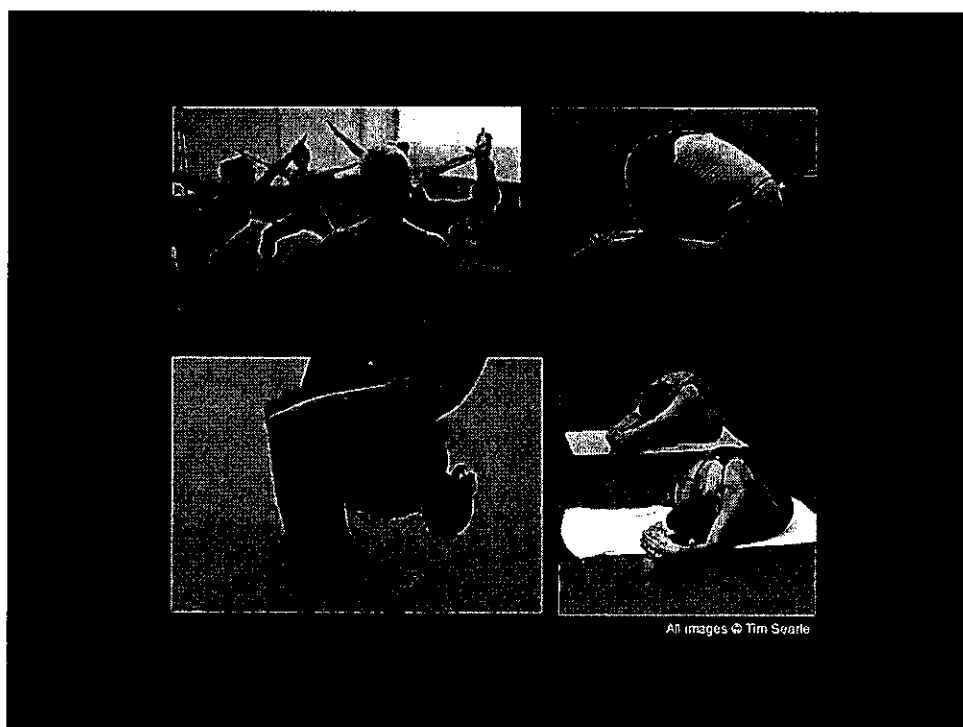
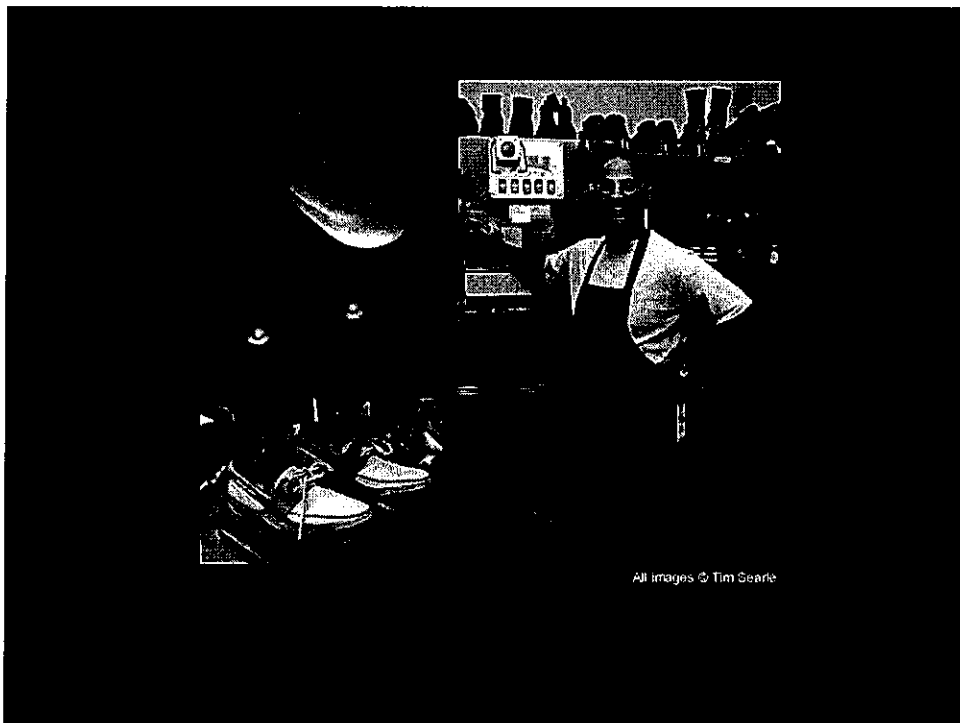
Index Component	Rank/137	Score (1-7)	Trend	Distance from best	Edition	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Global Competitiveness Index	13	5.4	↔	1	Rank	23 / 144	18 / 148	17 / 144	16 / 140	13 / 138	13 / 137
Global A: Basic requirements	5	6.0	↔	1	Score	5.1	5.1	5.2	5.3	5.3	5.4
1st pillar: Institutions	3	6.1	↔	1							
2nd pillar: Infrastructure	23	5.5	↔	1							
3rd pillar: Macroeconomic environment	16	6.1	↔	1							
4th pillar: Health and primary education	6	6.8	↔	1							
Global B: Efficiency of services	9	5.4	↔	1							
5th pillar: Higher education and training	7	6.0	↔	1							
6th pillar: Goods market efficiency	9	5.3	↔	1							
7th pillar: Labor market efficiency	5	5.5	↔	1							
8th pillar: Financial market development	1	5.8	↔	1							
9th pillar: Technological readiness	13	6.1	↔	1							
10th pillar: Market size	64	3.9	↔	1							
Global C: Innovation and sophistication factors	25	4.8	↔	1							
11th pillar: Business sophistication	24	4.9	↔	1							
12th pillar: Innovation	20	4.7	↔	1							



STEP 2: LOOK AT THE STORIES
BEHIND THE DATA



All images © Tim Searle

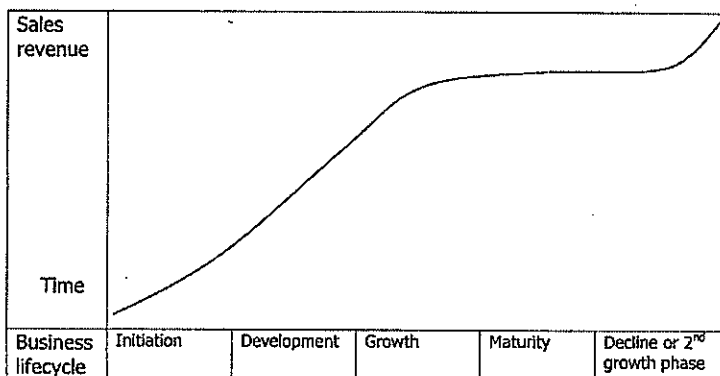




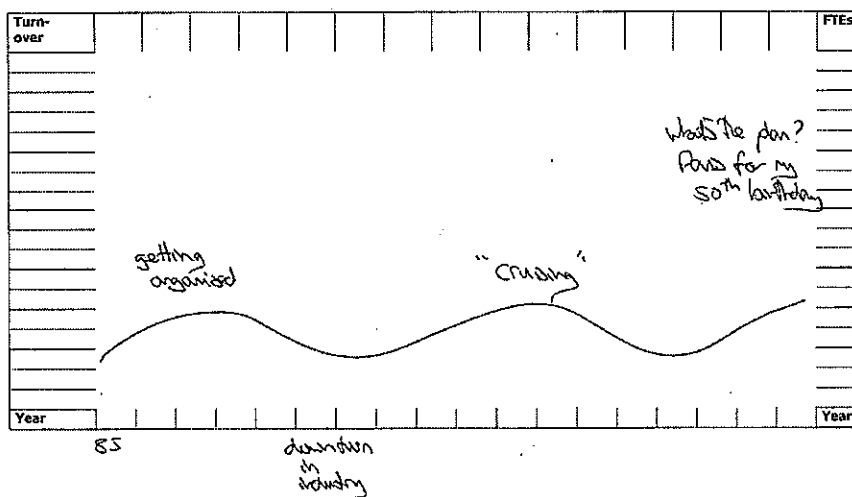


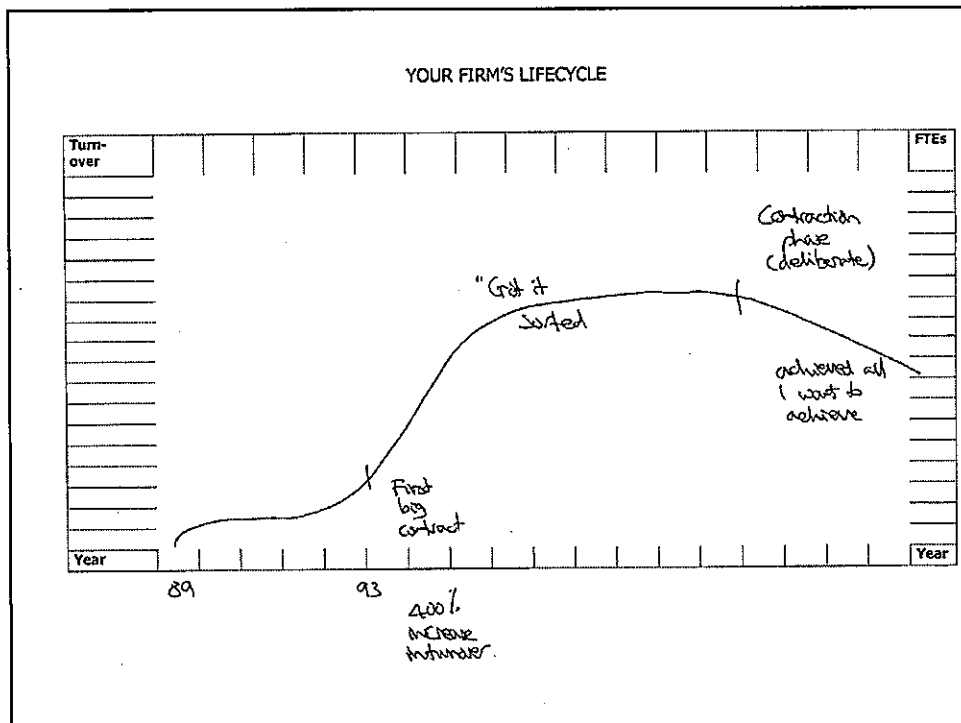
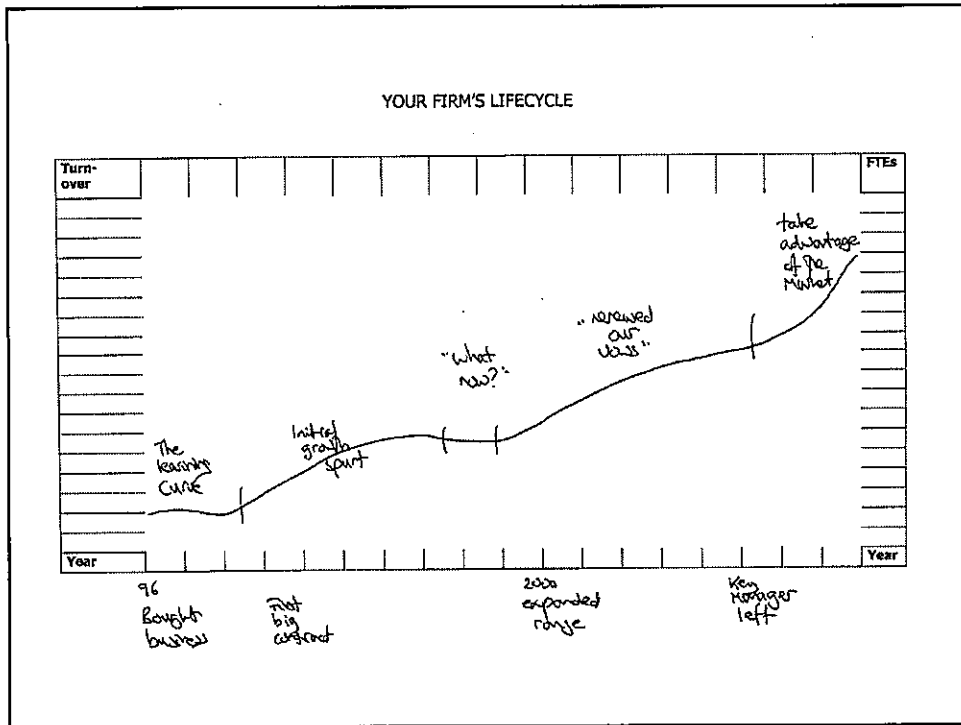
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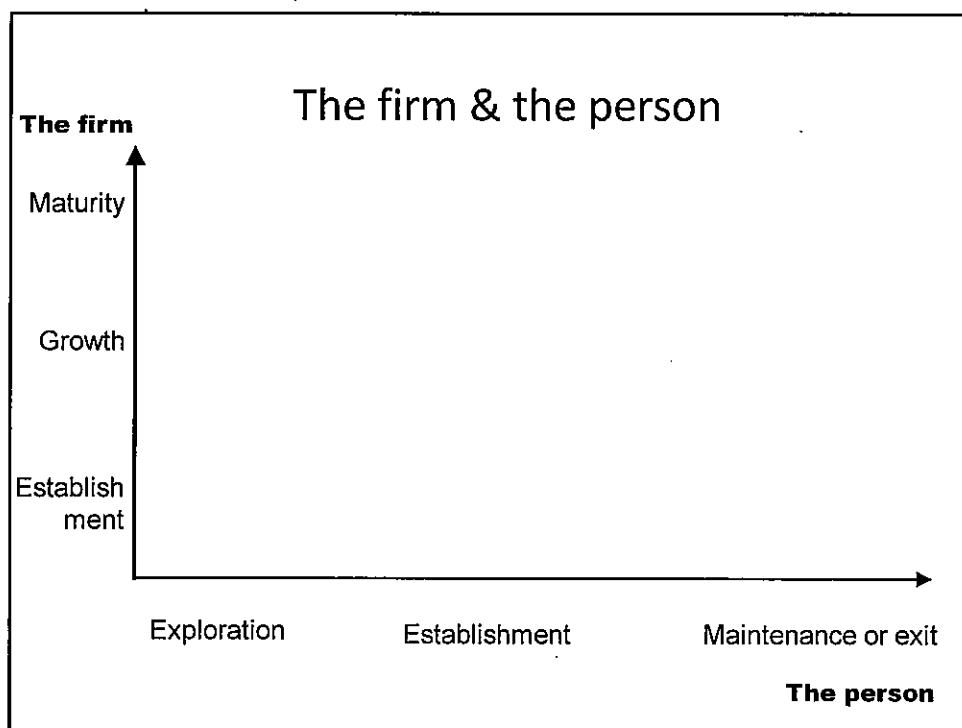
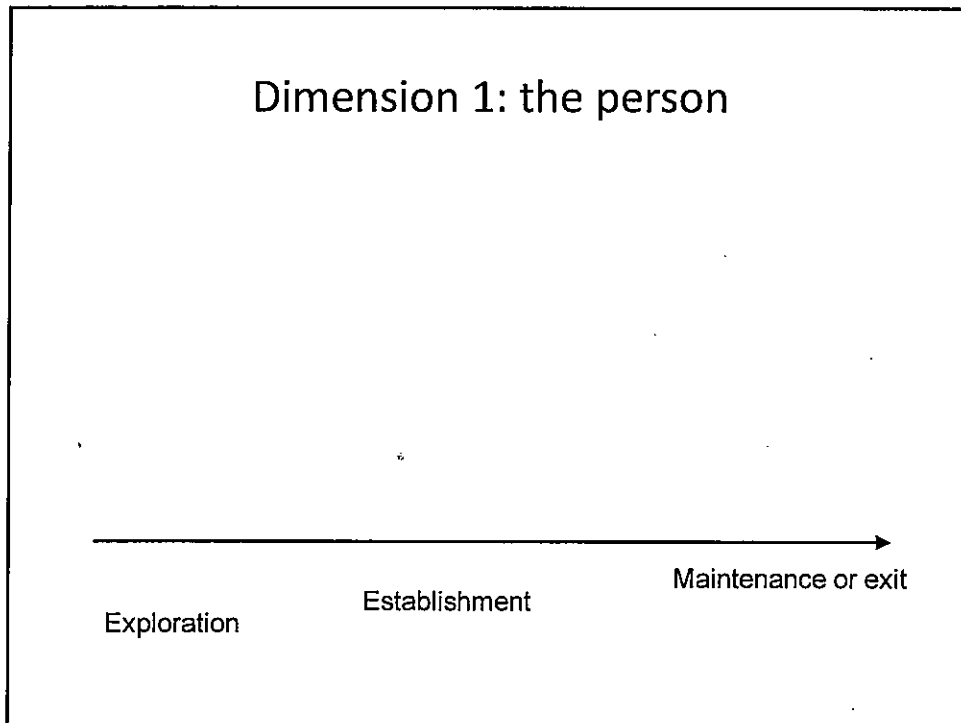
THE BUSINESS LIFECYCLE

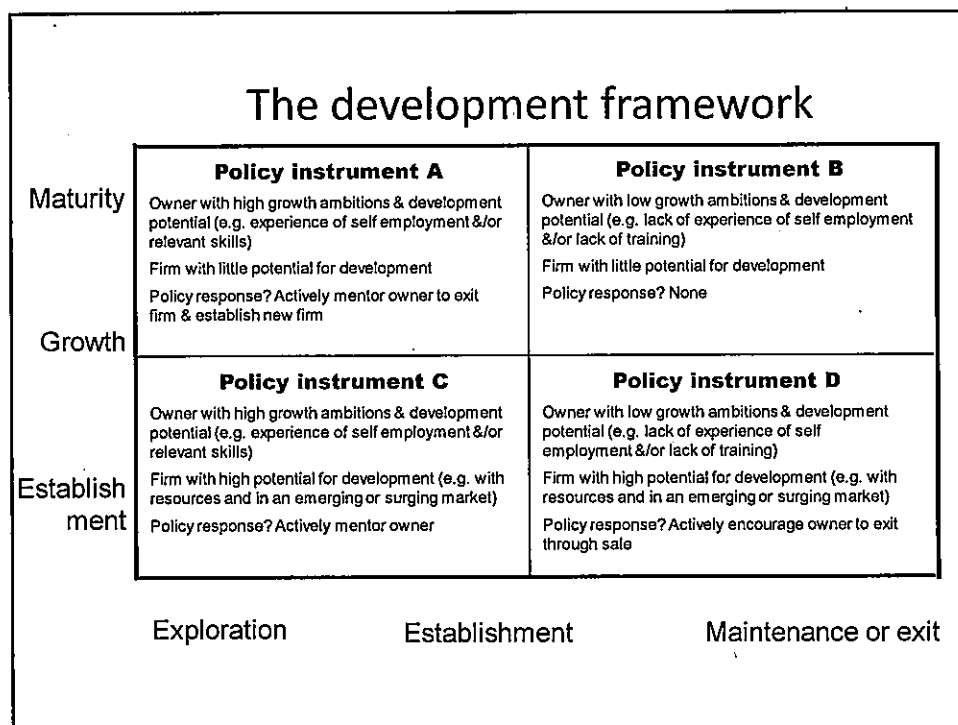
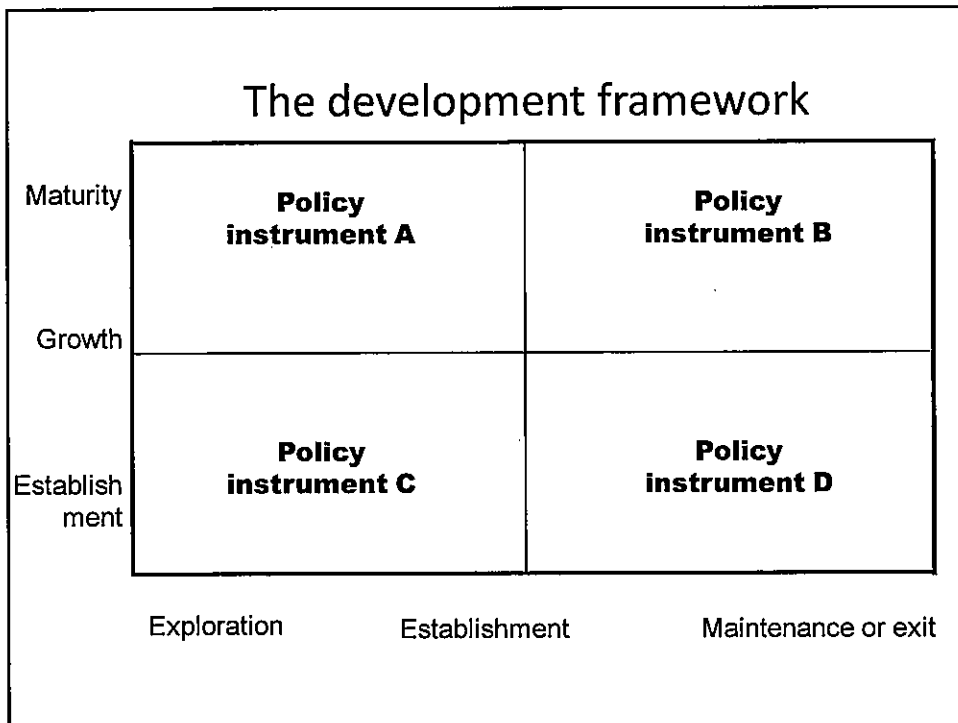


YOUR FIRM'S LIFECYCLE









STEP 3: TAKE ADVICE FROM THE EXPERTS (AKA PROF DAVID STOREY...)



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SUCCESSFUL POLICY

- Storey (2000 & in multiple places since then) argues that successful policy-making starts with clear objectives (e.g. reducing unemployment or increasing the number of start-ups) & has evaluation built in
- Relies on
 - accurate data
 - clear thinking
 - an awareness of reality of SMEs
 - an environment where there is an acknowledged link between all aspects of the situation (PEST) & the appropriate response(s)



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POLICY FOR TODAY

- Clear thinking does matter:
- Priorities change over time:
- Resource constraints a reality:
- Policy is made in a context (political, social, cultural):
- Identifying underpinning assumptions /worldview helps:
- Need to set SMART objectives
- Need to minimise policy lag
- But cannot drive policy
- No single answer will be effective for all countries
- Is SME policy designed to redress imbalances or because the sector offers the best option of addressing objectives?



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TAKE AWAYS...

- There are a variety of “development pathways” for firms in different industries and run by different people
- There are different roles for the parties to economic transformation
- A single model doesn’t exist – but smart people working in the context of their own economies do....

A well-known Maori proverb provides an answer to the question “He aha te mea nui o te Ao”

(what is the most important thing in this world?)

The answer is obvious - He tangata, he tangata, he tangata

(it is people, it is people, it is people)

Global Value Chains for fisheries and aquaculture

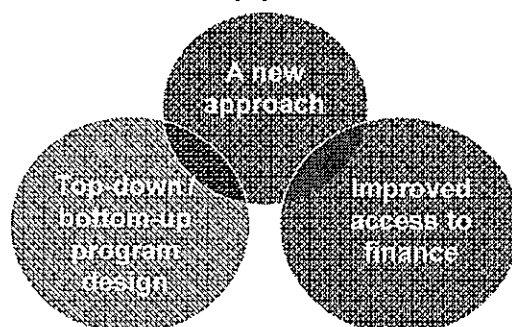
Project design and planning

Presented by Guy Watson

May 2018

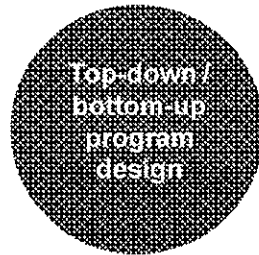
Project design and planning

A new approach



Project design and planning

A new approach



Project design and planning


1.0 Set some
goals



Traditional project planning

Project design and planning

1.0 Set some goals


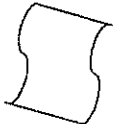


Eg "improve value chain by addressing capacity gaps"

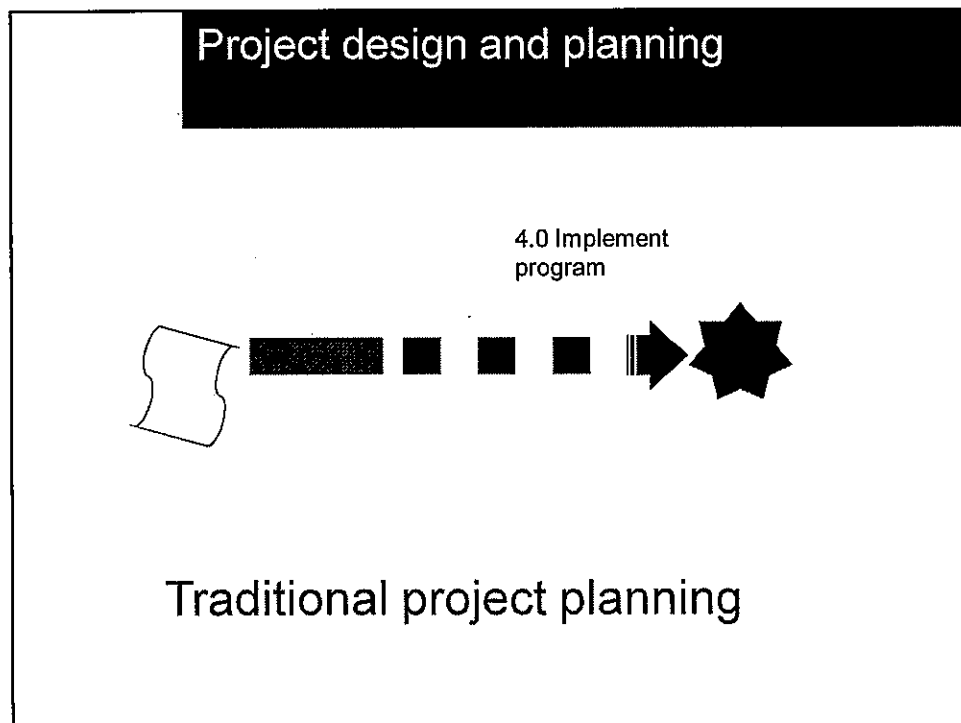
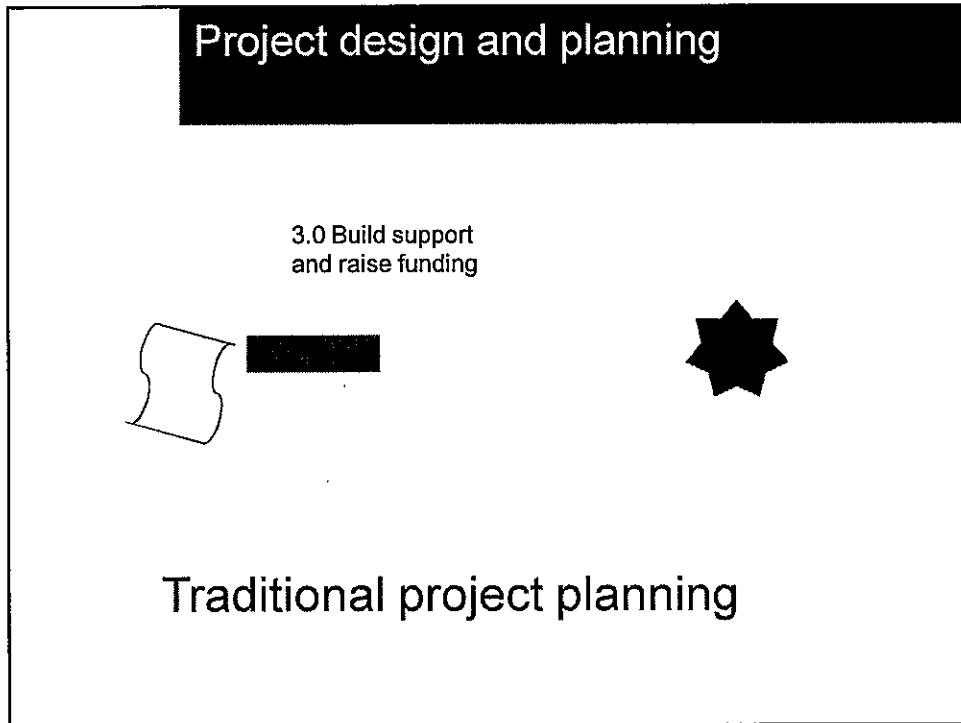
Traditional project planning

Project design and planning

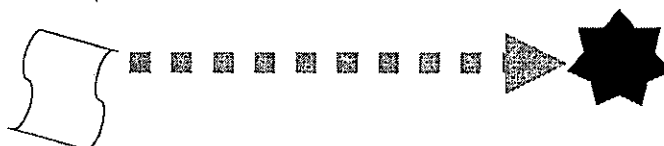
2.0 Design a program to do this



Traditional project planning

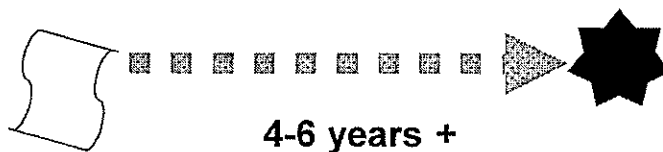


Project design and planning

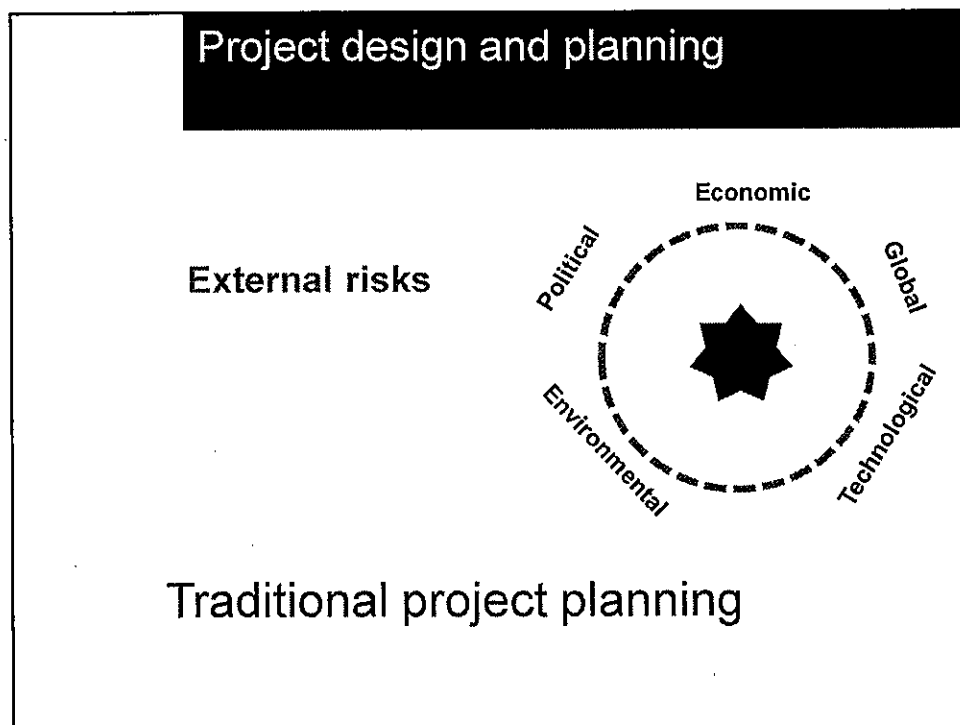
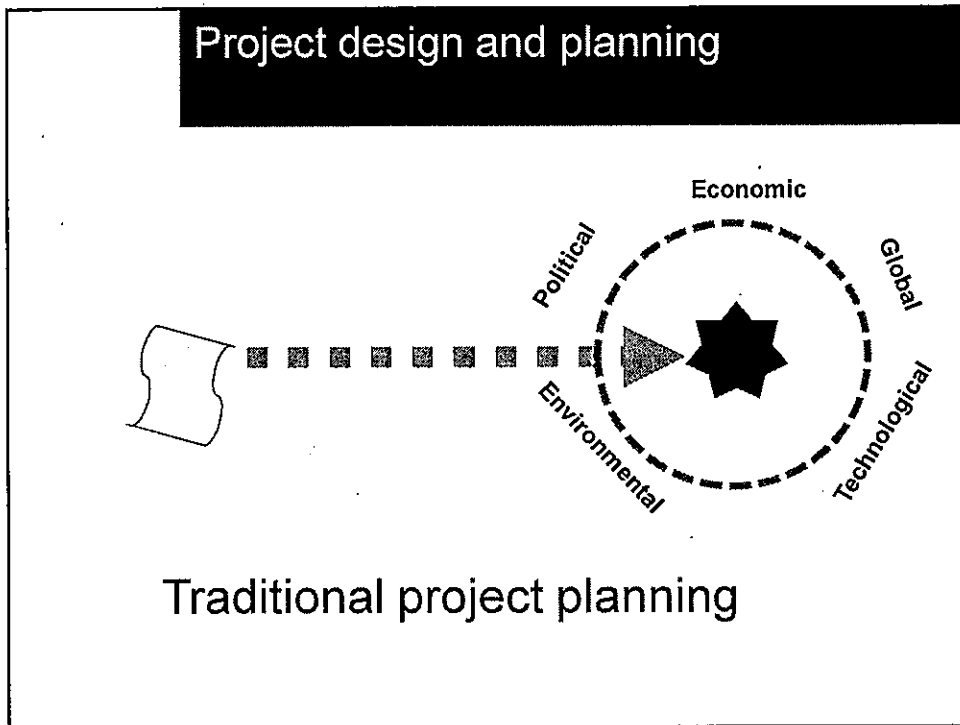


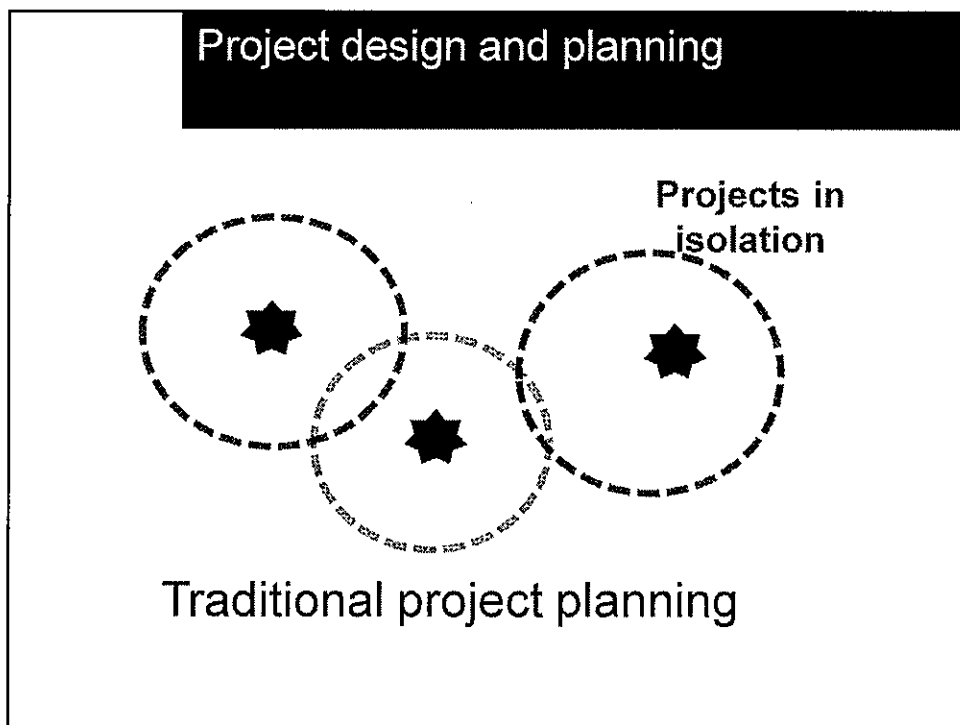
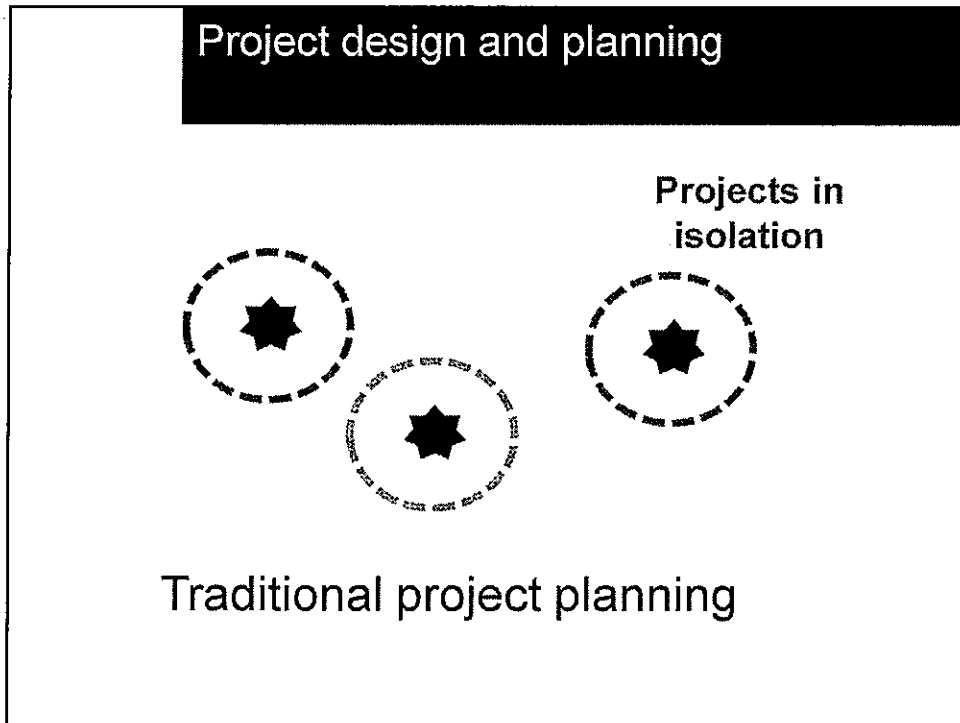
Traditional project planning

Project design and planning



Traditional project planning





A new approach learnings

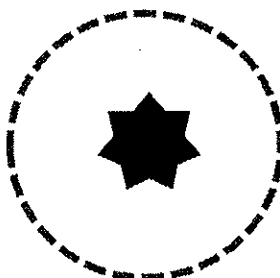
Project 'design' instead of a
linear approach:

Set goals of
PROJECT IMPACTS
and **OUTCOMES**
rather than filling
capacity gaps

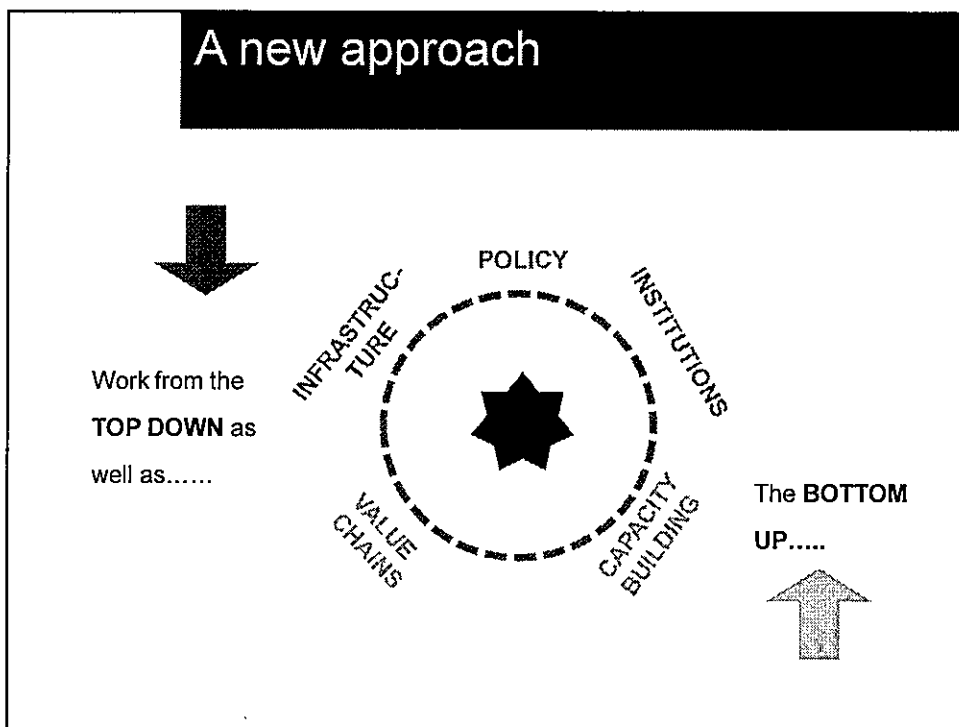
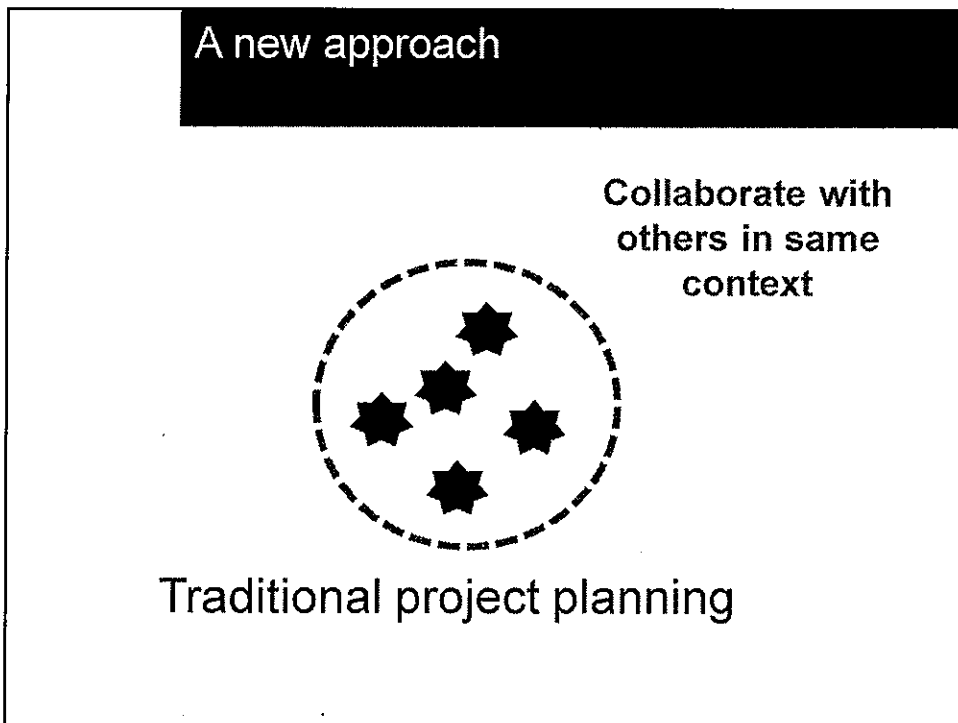


A new approach

Project 'design' instead of a
linear approach:

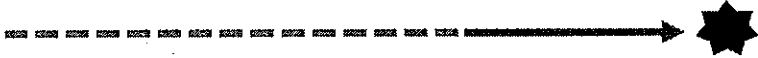


Consider the **CONTEXT**
as part of the design., not
an **externality to**
manage




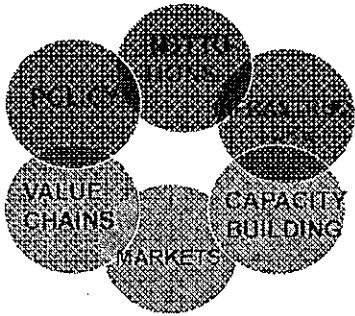
A new approach

Set out strategic goals,
over a time frame: eg 3,
5, 7+ years



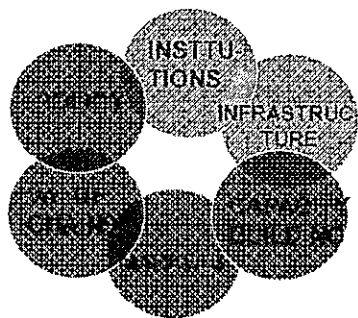
The diagram shows a horizontal arrow pointing to the right. The arrow is composed of a dashed line on the left and a solid line on the right, ending in a solid black star. This represents a timeline for strategic goals over a period of 3, 5, or 7+ years.

A new approach



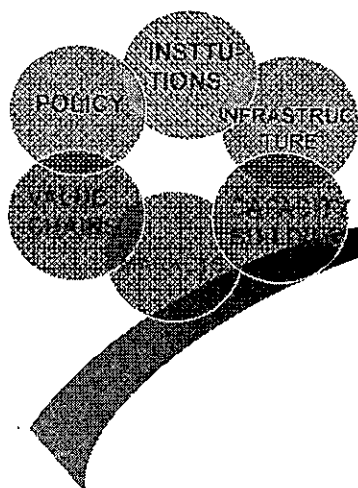
The diagram features a cluster of seven overlapping circles, each containing a term related to strategic planning or development. The terms are: POLICY, POLY, PLANNING, VALUE CHAINS, MARKETS, and CAPACITY BUILDING. A solid black star is positioned to the right of the cluster.

A new approach



Understand the broader context of the sector, and other sector activities.

A new approach



Map a pathway that draws in these variables, and integrates a number of smaller projects, and longer term external plans (eg infrastructure).

Conclusion

Project plan will contain:

- **Clear goals** that are evidence-based, achievable and quantifiable.
- **Methodologies and processes for partnerships and collaborations**, within the sector and from outside the sector
- **A series of sub-projects and programs** that are packaged and integrated with broader economic strategies, and informed by external variables.

Conclusion

Key steps for a design approach:

- **A base of evidence** that is determined through market assessment and analysis.
- **Establishing organizational and programmatic goals** to ensure that there is a measurable end state that the design seeks to achieve
- **Developing a solution that requires engagement across the organization**, that builds bridges between program, funding, and outside experts

Conclusion

Key steps for a design approach:

- **Establishing broad-based ownership of the solution**
- **Testing the approach** not simply with the traditional "top down, inside out" approach to case inter-views but with cohorts of people
- **Establishing performance metrics,** programmatically for the entire design,

Project design and planning

Thank you

Guy Watson
Global Edge Fifth Pty Ltd (Australia)

*GLOBAL*edge.

