

# Request for Letters of Interest

## Conduct a landscape analysis to understand improvement needs in Indian shrimp farming

We are seeking a contractor to conduct a landscape analysis<sup>1</sup> concerning shrimp farming in Andhra Pradesh to generally define the needs, barriers and opportunities for improvements and trainings (and the associated materials and processes needed). The deliverable will define opportunities to help shrimp farmers in Andhra Pradesh improve their practices for environmental, social, and economic gains; with the aim of improving both farm-level practices and landscape-level management.

### BACKGROUND

Shrimp is the most commonly consumed seafood commodity in the United States, and India continues to be one of the top exporters. While approximately 24% of Indian farmed shrimp production is from certified farms (across multiple certifications), there remains a significant gap to meeting the demand from international markets for certified product, along with the need to address sustainability issues at meaningful scale beyond that delivered through farm-level certification. The pathways for market leverage to drive the necessary improvements are not always clear and can be challenging where incentives are not strong, or [incentives] may be negative. Further, there is a notable lack of capacity within the supply chain to effectively address the environmental and socio-economic challenges. India represents the third highest producing country of aquaculture globally; and representing nearly 13% of shrimp production, India is just behind that of Vietnam.

Sustainable Fisheries Partnership (SFP) and the Aquaculture Stewardship Council (ASC) are working collaboratively to establish the contextual framework of the opportunities, gaps, and capacity needs to effectively implement landscape-level aquaculture improvement projects in the Indian farmed shrimp industry.

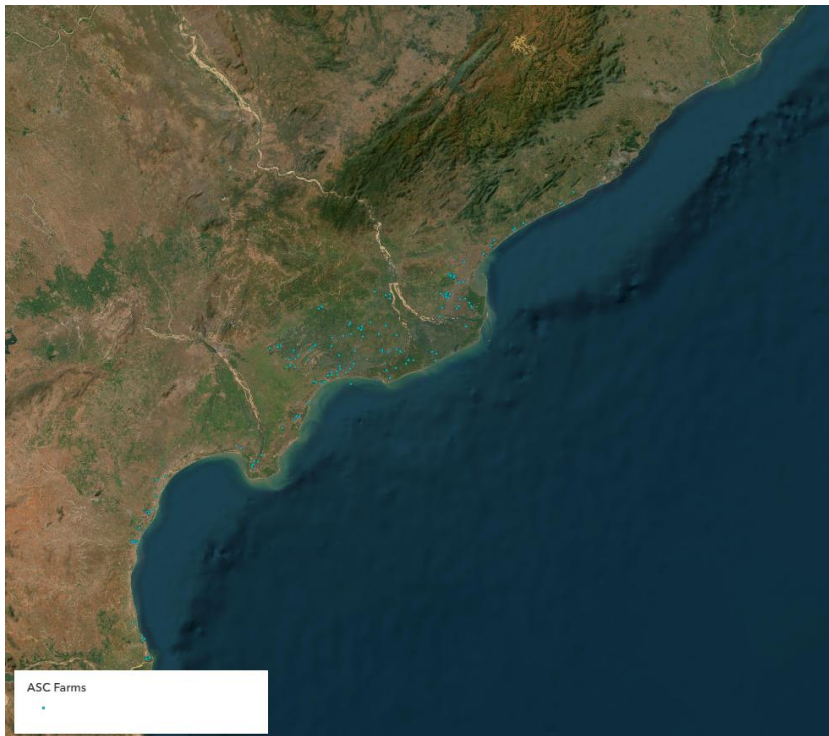
In this context, we recognize that the landscape consists of several layers including environmental geospatial layers (such as watersheds and other ecological boundaries), jurisdictional layers, and various socio-economic and societal layers. Understanding the general dynamics of these layers and interactions with shrimp farmers is key to develop the framework and corresponding interventions that will enable scalable improvements beyond the level of the farm.

A previously conducted data mapping exercise explored the presence of certified and registered shrimp farms in Andhra Pradesh, potential aquaculture management areas and thematic impact areas where improvement needs are expected and is presented in the form of an interactive map. This provides a foundation to further discussions with

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<sup>1</sup> A Landscape Analysis outlines the strengths, resources, and needs of a community to provide a framework for designing a service and ensuring that it is embedded directly in the needs of the community.

supply chain partners and industry representatives. Especially among stakeholders in a common geography.



*Example output from data mapping exercise illustrating locations of ASC certified farms.*

## PROJECT INTENT AND ANTICIPATED TASKS

The intent of this contract is to assess and identify the improvement needs and strengths of farmed shrimp in Andhra Pradesh in order to identify opportunities for landscape-level improvements.

The needs assessment should be based on an understanding of the needs of shrimp farmers in India, and specifically Andhra Pradesh, and thus should be informed by both desktop and interview/survey components. Information from SFP, ASC and others<sup>2</sup> should inform the topic areas of focus, but the consultant should expand beyond these if findings reveal that shrimp producers have other critical needs beyond these topic areas. The following outlines the types of information we anticipate being collected to inform the needs assessment.

The landscape analysis of the proposed project area (Andhra Pradesh) is expected to provide an overview of the variables at play in the region and how these may enable or impact aquaculture improvement projects. The project should aim to collect the following information:

1. A general overview of shrimp farming in Andhra Pradesh.
  - a. General assessment of shrimp farming: To include approximately - how many farmers are out there and their status, farm size (e.g. industrial,

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<sup>2</sup> Available reports will be provided for the consultancy.

smallholder), characteristics of those farms, shared water bodies among groups of farmers, organisation of the supply chain, list of processors, local government, key markets?

- b. Additional data sources (if available) that can be used to enhance the utility of the data map? Key actors in the region: The key processing companies, input providers, organizations and individuals that are currently working with shrimp farmers in the targeted region.
    - i. Are there shrimp farmer collaborations or organizations in the areas and approximately how many farmers and sites do they represent?
    - ii. Are there other institutions (e.g. universities, extension services, service providers) that are or can support improvements?
    - iii. Do these farms already interact with NGOs and/or governments? In what capacity?
    - iv. What are the national and provincial/local agencies involved with citing, permitting, and managing aquaculture operations in Andhra Pradesh? What are the national and provincial/local agencies involved in managing coastal lands, ecosystems, watershed, etc where shrimp farming occurs in Andhra Pradesh? Can key divisions, programs, and individuals be identified within the agencies found above?
  - c. Farmer relationships.
    - i. What are the relationships between farmers and processors? E.g. what is the role of middlemen? Are middlemen providing only financial / offtake services or are there other (e.g. cultural) roles for middlemen as well? Is there contract farming? Do processors operate their own (vertically integrated) farms? If so, what % is integrated? Or more broadly, are there any known barriers to processors potentially promoting certain training programmes for farmers? In general, how do the farms in a region interact with each other? With their processors? With the government?
2. Improvement needs: The key areas for improvement at the farm and landscape levels (e.g. feed, effluent, disease, mangrove management) and the general types of improvements needed (e.g. specific practices, documentation, technological advances, etc.).
- a. What are the general challenges to improving environmental and social performance on farms in Andhra Pradesh? How do these challenges relate to site, multi-site, zonal and regional scales?
  - b. Can the challenges/improvement needs be grouped by training needs, equipment needs, methodological needs, access to technology or others?

- c. What is most needed to assist farmers in making improvements? What capacity (e.g. funding, organizations, financial incentives) exists to support improvements
3. Barriers to and opportunities for improvements: The primary challenges and barriers or opportunities to social and environmental improvements at both the farm and landscape-level for shrimp farms in Andhra Pradesh.
  - a. Are shrimp farms in the ready currently, or previously, engaged in any types of improvement programs?
  - b. Is there any sense of the appetite for improvements and training and what incentives might drive farmers? And related, based on the findings, what sort of training model seems most appropriate and through what format should training be accessed (i.e. training of trainers, farmer to farmers, language needs...)?
4. Guidance on a training programme: Recommendations for training tools and products (and other aspects of a training programme) for various audiences (e.g. extension agents, farmers) based on the findings from questions 2 and 3 above.
  - a. Are any farmers currently or previously engaged in any training programs? If so, are any existing training material (manuals, etc.) publicly available and could they be provided?
  - b. Has the impact of previous training programs been tracked or evaluated?

The consultant is expected to review available public information, conduct discussions with relevant staff at ASC, and SFP, and reach out to contacts at collaborative/industry organizations, consult with government and extension agents working in the region, at local processing facilitates, and others, if possible and where appropriate.

## DESIRED OUTCOME

An enhanced understanding of the improvement needs and local situation for shrimp farmers in Andhra Pradesh, to add focus for the development of training materials to be used in a targeted aquaculture improver program. The final report should provide a summary of methodology, contacts made, and recommendations as they relate to barriers to improvements, key actors, and training program recommendations.

## TIMELINE

The consultancy will be initiated immediately upon contracting and last for approximately 4 months. Desired date for deliverables is the 31 July 2024. Monthly check-in calls will be convened.

Travel may be conducted if deemed safe and appropriate in discussion with ASC and requires prior approval.

## SUBMISSION REQUIREMENTS

Please submit a letter of interest detailing:

- understanding of the subject area and region,

- project approach to meeting the desired outcomes, and a summary of experience with relevant project examples,
- budget for the proposed approach, time per task inputs and proposed timeline, along with any anticipated expenses with your submission.
- Please include a copy of your cv or resume. Small teams are welcome to apply.

Submissions are due 8 March 2024. Direct any questions and proposal submissions to Jill Swasey, Director of Impacts, Monitoring & Evaluation, Aquaculture Stewardship Council ([jill.swasey@asc-aqua.org](mailto:jill.swasey@asc-aqua.org)).