**Baseline study for Fisheries Development in Telangana state**

**ANN – 4.10**

Stakeholders’ Analysis

* **Primary**

|  |  |
| --- | --- |
| * **Stakeholders** | **Fishers- Full time & Part time** |
|  |  |
| **Fishers- Full time** |  |
| * Stake/Involvement | High poverty among fishers; High disguised employment; Limited alternative livelihood options; Low and unsecured income; Social and economically deprived; Lack of entrepreneurship and risk bearing; Fully dependent on income from fisheries activities – mainly fishers of large / medium reservoirs and perennial tanks; also fish for family consumption |
| * Participation | Main participation, Involve/Participate / undertake fish seed stocking, watch and ward, daily fishing and marketing |
| **Fishers- Part time** |  |
| * Stake/Involvement | Seasonal and part time income – mainly fishers dependent on seasonal reservoirs and tank fish culture |
| * Participation | Supportive participation; Support/assist in managing fisheries operations such as pre stocking, stocking, post stocking – input management, upkeep of water bodies, watch and ward, harvesting and marketing |
| **Fishers- Full time & Part time** |  |
| * Roles & Responsibilities | Abide to Licence / lease norms of DOF, Share multi-level responsibilities in both resource development and fish production processes by joining hands with DOF / FCS |
| * Interest | Obtain Long term fishing rights-lease, license, patta;  Fishing / pursue low input based fish culture for increased fish production, income, additional employment; better social status with increased role in decision making |
| * Levels of involvement/ status | Limited involvement of licensee fisher in the sustainable resource development process; Lack of participatory process in development; absence of exclusive mechanisms to mainstream them. |
| Fishers of FCS, though aware of their tasks, but are constrained to fully get involved in the operations as they are constrained by limited management skills, influence and financial capital; do not enjoy full freedom of resource ownership and the output |
|  |  |
| * **Stakeholders** | **Subsistence** |
| * Stake/Involvement | Fishing for food not prominently visible – limited to rivers and canals, non conventional water bodies |
| * Participation | Casual participation Participate in activity whenever they feel like |
| * Roles & Responsibilities | Abide to Licence / any other requirements. |
| * Interest | Fishing to meet mainly family requirement and occasionally for sale if excess |
| * Levels of involvement/ status | Casual involvement / not concerned on sector related activities |
|  |  |
| * **Stakeholders** | **Spouse of fisher and other members of family** |
| * Stake/Involvement | Earn subsidiary / additional income to family |
| * Participation | Secondary participation, Fish marketing- sale of fresh/ dry fish, value addition –drying, assist in harvesting, catch handling, loading /packing, net repair |
| * Roles & Responsibilities | Extend supportive and facilitative hand holding to their men fishers of the family |
| * Interest | Explore and pursue alternative income generating activities , better status in family and role in decision making |
| * Levels of involvement/ status | Participation is sporadic due to limited opportunities, and supportive programs |
|  |  |
| * **Stakeholders** | **Aqua farmers-seed producer/hatchery owners/ seed growers Fish / prawn farmers/ cage/pen fish culturists** |
| * Stake/Involvement | Fully/partially dependent on income from aquaculture activities – in farmers owned/leased private resources |
| * Participation | Main participation Fish production, fish seed rearing, fish seed production and other related activities.  Hatchery owners/ seed growers provide basic input- seed material locally |
| * Roles & Responsibilities | Pursuing activities on environmentally sustainable manner complying the existing and anticipated policy guidelines |
| * Interest | Earning Increased income per unit resource use through approaches of better farming practices. Increased role in decision making |
| * Levels of involvement/ status | Limited farmers in aquaculture segment as the activity is new and is catching up in recent years. Lack of awareness, knowledge base, professional skill, limited empowerment activities has constrained the participation of farmers / private entrepreneurs into activities .The seed producers (barring a few) have yet to master the techniques, though they are learning by mistake/experience with private investment. |
|  |  |
| * **Stakeholders** | **Input suppliers feed/net/ Ice and Others** |
| * Stake/Involvement | Presently no major role or stake is seen for input suppliers excepting ice plants in private sector, formulated/ company base feed and health care products service providers in districts where aquaculture is being pursued |
| * Participation | Secondary participation. The present volume of ice production is too meagre to meet the demand. Nevertheless wherever operating, the ice plants are able to cater to daily needs |
| * Roles & Responsibilities | The ice plants have smaller capacities and thus are unable to meet the demand. |
| * Interest |  |
| * Levels of involvement/ status | The ice plants are functioning at sub-optimal level since the demand is limited. |
|  |  |
| * **Stakeholders** | **Value Addition Processing agencies** |
| * Stake/Involvement | These agencies are presently not in operation in the state |
| * Participation | Tertiary participation |
|  |  |

|  |  |
| --- | --- |
| * **Fish traders & Marketers** | |
|  |  |
| * **Stakeholders** | **Non fisher aggregators** |
| * Stake/Involvement | Depend on marketing of fish for their livelihood and additional earnings |
| * Participation | Secondary participation; provide first level of outlet for disposal of fish; take away major tension and burden of disposal of fish on behalf of producers;  strong link between producers and urban and semi urban consumers as also exporters |
| * Roles & Responsibilities | Responsible to haul fish from production points to strategic locations, hold fish for further transmission to semi / urban centres; Perform huge task of balancing between production and supply of fish and maintaining credible links with related stake holders. |
| * Interest | Increased income; better status and recognition in the fish market segment;  Expansion of business as whole seller with increased presence both in domestic and outside state fish marketing channels. |
| * Levels of involvement/ status | The aggregators are generally motivated youth coming from the local areas/regions . They have, over a period of time, learnt the knack of business and making good cut from their operations.  Many of them are into sale of fish outside the state and earn higher income.  The Aggregators are constrained by limited scope when it comes to expanding business since the wholesalers appear to have restricted this segment to small time intermediation. |
|  |  |
| * **Stakeholders** | **Retail Traders** |
| * Stake/Involvement | Major stake in fish trade and are fully dependent on income from the activity.  Trade in fish has been their family occupation and therefore, they have high stake in this chain |
| * Participation | Secondary participation. They are into market intermediation from decades.  As secondary market players, act as intermediaries between aggregators / producers and wholesalers / dealers/ exporters.  Collect sizeable volume of fish from the aggregators/ fish producers for direct retail marketing |
| * Roles & Responsibilities | As active market players, shoulder responsibilities to meet day to day demand for fish both in local as well as far-off markets  They are major link between metro markets and first level aggregators/fish producers |
| * Interest | Increased income from the activity.  Expand business activity and enhance activity as whole seller |
| * Levels of involvement/ status | Partly involved with primary producers – tank fishers through agreements with FCS, advancing money, goodwill support of fish/freshwater prawn seed stocking, varied levels of support for religious and cultural activities etc.Financially supporting aggregators involved in sector market chain  Providing post fish sale service of fish cleaning/ dressing, slicing etc as per consumer needs  Not much concerned with market hygiene maintenance etc, also the dynamics of fisheries sector and policies of the govt. for sector development. |
|  |  |
| * **Stakeholders** | **Wholesale Traders** |
| * Stake/Involvement | Fish business and providing access to quality fish at affordable price and their stakes are limited to meeting demand and supply of fish |
| * Participation | Secondary participation Volume of fish marketing operations is huge  They also provide financial assistance to the fishermen through their intermediaries and thus indirectly help smooth fisheries production activities. |
| * Roles & Responsibilities | Major responsibility of the wholesalers is to act as link between primary producers and urban consumers.  They are not directly involved in any programs / plans on fisheries sector growth. |
| * Interest |  |
| * Levels of involvement/ status | The Wholesalers have been the backbone of urban consumers but do not have any stake in the production chain.  Functioning as just a business intermediaries and nothing more. |
|  |  |
| * **Stakeholders** | **Women MMs/SHGs** |
| * Stake/Involvement | Fully dependent on income from fish marketing and related activities |
| * Participation | Main participation Fish marketing; production and sale of value added products and service, post sale service of Fish dressing and packing |
| * Roles & Responsibilities | Supportive role in providing market links and intermediation help to producers in finding ready and remunerative markets. Also expected to inculcate thrift and saving, pursuit of mutually advantageous activities and pull themselves from poverty level |
| * Interest | Fish marketing as main income generating activities, progress as entrepreneurs with business models, establish small scale cottage industries in the sector; better status and recognition in the fish market segment and increased role in decision making |
| * Levels of involvement/ status | Many of the members of these groups have no exposure to new avenues and opportunities which can benefit them and bring them to a good economic level.  Their saving potential is not very encouraging due to meagre income |
|  |  |
| * **Stakeholders** | **Fish consumers** |
| * Stake/Involvement | Purchase of fish for consumption |
|  |  |
| * **Stakeholders** | **Local Money lender** |
| * Stake/Involvement | Lending financial support for development of sector supply chain |
| * Participation | Extending support for input purchase and other operational expenses |
| * Roles & Responsibilities | Meeting financial needs in support of activities |
| * Interest | Increase share of returns from the fisheries activities |
| * Levels of involvement/ status |  |
|  |  |
| * **Stakeholders** | **Fisheries workforce** |
| * Stake/Involvement | Supplementary income from the activity |
| * Participation | Unskilled jobs, Watch ward and security, fish harvesting support, handling of produce, packing, loading and transportation support |
| * Roles & Responsibilities | Providing on site additional support to activities |
| * Interest |  |
| * Levels of involvement/ status |  |
|  |  |
| * **Institutional stakeholders** | |

|  |  |
| --- | --- |
| * **Stakeholders** | **Department of Fisheries** |
| * Stake/Involvement | Do not directly depend on income of the resource; highest stakes of sustainable fisheries sector development and growth in the state; have influence over interest in sector growth; It has multiple tasks of supportive, facilitative and regulatory roles to be accomplished to achieve the objectives. |
| * Participation | The DOF has been playing huge role in bringing fisheries sector to an even keel and put it on the Fisheries map of the country.  It has been promoting fisheries through institutional means roping in fishermen and providing financial and technical support, supportive role in fish seed production in govt. hatcheries and also seed rearing in support of meeting seed requirement of fishers for stocking water bodies |
| * Roles & Responsibilities | Supportive, facilitative and Regulatory roles and functionality;  **Supportive:** Providing technical service to FCS and others -knowledge transfer support, information support, Advisory support to state and central government and its agencies and other institutions related to fisheries, implementation of schemes/programs, policies; Inventories, directories, etc.  Facilitative: Liaisoning with R&D and KT institutions, universities, NFDB, NCDC, Matsya fed and such other boards, bodies/agencies engaged in fisheries & aquaculture development; collaborative arrangements with varied institutions; arrange counseling and support service for FCS / women in need; Integrated resource development  Formation of SHG’s/activity group and supporting them; Gender sensitization; Partnership initiatives;  Focused manpower development in sector; Capacity building of local institutions involved in sector development; Working with civil society organized for promotion of community consciousness, voluntary action and member participation in development process; Community mobilization, community empowerment, networking with institutions at different levels;  Regulatory: monitoring support, implementation of policy/guidelines :and endeavouring |
| * Interest | Equitable sharing of the natural resources.  Plan production of required seed ; assess the requirement of fish seed of required species and quantity.  Mobilize production/rearing operations in advance to be able to meet time line. Reduce dependence on outsourcing thus losing resources and employment opportunities |
| * Levels of involvement/ status | The present set up of the DOF is not adequate to translate its policies and plans into actions.  Staff constraint is major bottleneck in achieving accelerated growth of the sector.  The Govt hatcheries are presently under-worked for want of resources and man power.  Their share in total supply of seed is meagre and not in the reckoning.  The hatcheries and seed farms are operating below optimum level. |
|  |  |
| * **Stakeholders** | **Fishermen Primary Cooperatives** |
| * Stake/Involvement | Major stake holders in getting access, control, management protection of water bodies as also production processes and operations. Influence over /interests in resource; local institutions to meet the interest of fishers; fulltime/part time / subsistence; members welfare  Rightful managers of water bodies |
| * Participation | Plan, organise and supervise stocking, watch and ward, maintenance, harvesting and disposal of the produce. |
| * Roles & Responsibilities | Manage all production related activities such as raising/ finance seed procurement /  Outsourcing of seed , stocking , supervision and control of the operations, Sale of fish, and equitable sharing of the income.  Also responsible to abide by the conditions of lease, Societies Rules and maintain transparency in operations and be accountable and answerable to their members DOF and other concerned institutions |
| * Interest |  |
| * Levels of involvement/ status | The present set up of the cooperatives is not able to fulfil its obligatory duties.  Lack of sense of ownership and responsibilities to deliver desired fish production to the state and benefits to members. The level of knowledge of large majority of FCS is much to be desired.  The FCS are not found to adopt transparency in their operations  Groups /power centres/ are common problems  Clear absence of institutional linkages with District FCS, and state level federations. Similarly lack of institutional network in support of trainings and capacity building, technology hand holding, support of institutional credit, insurance etc. |
|  |  |
| * **Stakeholders** | **Women Cooperatives** |
| * Stake/Involvement | Second most important stake holders in the supply chain; play a key role in bridging link between production and final disposal of the produce.  The WMCS huge stake in the activity since their livelihood is dependent on fisheries |
| * Participation | Collection, aggregation and sale of fish and fish products. Function as an important intermediaries in the marketing chain |
| * Roles & Responsibilities | Channelizing the fish between the production centres to market in support of better access and choice to consumers at different levels of marketing chain  Control exploitation of consumers by traders and dealers. |
| * Interest |  |
| * Levels of involvement/ status | The members of the societies are by and large semi-literate and are not fully aware about their rights and opportunities that await for them. They lack exposure to many new and innovative ideas in not only marketing but also taking advantage of the schemes meant for them.  Though they appear to be transparent, they need special exposure and training in Management of their affairs and accounting. |
|  |  |
| * **Stakeholders** | **District Fisheries Cooperative Societies and Fishermen Federation** |
| * Stake/Involvement | Promote fisheries and protect fishermen interest.  Huge stake in the growth and stability of fisheries in the state with better community benefits |
| * Participation | At present the role of these two agencies not fully discernible in the Fisheries sector growth.  Their operations are limited to implementation of the schemes and distribution of subsidies.  Their role in fish marketing is yet to be visible. |
| * Roles & Responsibilities | The DFCS has not been seen to be providing tangible support  Federation is providing effective support in a very limited way and serves limited clientele |
| * Interest |  |
| * Levels of involvement/ status | The two Agencies have been ailing with internal and external limitations at present. |
|  |  |
| * **Stakeholders** | **NGOs** |
| * Stake/Involvement | Though the NGOs and KVKs have no major stake in fisheries sector growth, they are expected to provide supportive services to the Govt in its programmes . |

|  |  |
| --- | --- |
| * Participation | NGOs and KVKs are agencies that can mobilise the fishermen and provide training and afford technology transfer.  Their role in creating awareness among fishermen also is imminent |
| * Roles & Responsibilities | They have the responsibility of bringing about social change by educating the stake holders. |
| * Interest |  |
| * Levels of involvement/ status | These agencies are presently not fully engaged in provide services except in case of some KVKs which are organising training of fishermen.  They are constrained by resources and hence they do not get involved in fisheries sector growth directly or indirectly. |
|  |  |
| * **Stakeholders** | **Krishi Vigyan Kendras/ Universities, Inland Fisheries Training institute of DOF** |
| * Stake/Involvement | Developing Human resources with specific skills by KVK’s.  The DOF training institutions have major responsibility of developing skilled manpower and thus has key stake. |
| * Participation | These centres also have major role in capacity building and upgrading fishermen skills.  The role of training institutions is very imminent from the point of view of creating skill inventory and meeting future demands |
| * Roles & Responsibilities | The training centre at Warrangal is running a course in fisheries and turning out good number of young technically qualified man power.  Many of them have joined private enterprises in seed production and fisheries activities. |
| * Interest |  |
| * Levels of involvement/ status | The centre has limited facilities and wherewithal’s to enhance its activities in support of effective and efficient use of fishery resources to the advantage of sector sustainable growth.  Presently limited number of youth is being trained.  Training capsules also are not adequate for meeting future demand. |
|  |  |
| * **Stakeholders** | **Financial Institutions** |
| * Stake/Involvement | Have no direct stake in the sector but have high relevance from point of view of boosting economic activities. |
| * Participation | As per information though the FIs have key role in providing financial assistance, they are operating at low key. |
| * Roles & Responsibilities | FIs are required to support sector growth as natural policy of food security; at present presence in this sector is not visible |
| * Interest |  |
| * Levels of involvement/ status | The FIs have yet to formulate a policy of supporting fisheries sector . |

**General observations:**

* There is lack of unity of purpose among various stakeholders and in most instances are functioning in isolation with less awareness and concerned to each other’s interest and responsibilities.
* Considering the multifaceted nature of resource use and the potential for conflict and competition there is a need for holistic approach to meet the challenge- stakeholders has a major role.
* Due to inefficient or ineffective use of resources, resources depletion are happening at different levels and warrants for strategic partnership of various stakeholders to cope with the changing environment and also, to ensure effectiveness in implementation of various programs/ initiatives of the DOF in support of sector growth.

Addressing these, there is a need to ***'foster good partnership among fishery stakeholders’***. In this regard DOF in collaboration with stakeholders must have a clear and comprehensive strategy for the development.

* **Fishers :** Fisheries activities are managed through the Cooperatives and as such, individual fishermen do not have any specific role except contributing labour and sharing the costs and benefits. Due to prevailing weak participatory process with in FCS, Society office bearers have full freedom to take their own decisions. Only in cases where the FCS have heterogeneous groups, individual members make voice their views and opinions and influence the Management committee performance / working.

The licensee members have very little role in the management of reservoirs except fishing since stocking and other management aspects are taken up by the Government.

* **FCS (men):** The FCS functions are not very open and transparent. Many power-groups are built within the institutions. Wherever they have heterogeneity of membership, they appear to be performing well but transparency is not seen even in such institutions also. The societies are fragile in financial terms and no effort to position for a self operating in built mechanisms and process for financial strengthening of organization, building cash deposits in society account in favour of future activities.
* **Women Cooperatives:** They have major stakes in finding outlets to fish produced in their areas. They are supporting and managing channelized supply of fish to the consumers. They have moderate levels of operations and are weak financially. They are also financially fragile and cannot make investments / expand their activities. They need financial support as revolving funds, seed capital, institutional finance at low interest rates etc. for this purpose.
* **Aqua farmers:** This is a new and emerging segment activity among fishermen-entrepreneurs. The present generation of entrepreneurs have yet to take strong footing in aquaculture. Their operations are moderate, technology use is at low level (nearly conventional). This segment of fisheries holds huge promise of growth and expansion. However, the present support to this section is not adequate. Since aquaculture can play very imminent role in fish production and meet market demand, there is need to formulate special programmes .
* **Hatchery managers and fish seed growers (private):** This is another segment with tremendous scope and opportunity and has a major role in fisheries sector growth. The state depends heavily on the neighbouring state for seed supply at present and thus opportunities for employment and income generation to the local fishermen are being deprived. These service providers can absorb large number of fishermen in the employment. In view of the need for internalising seed supply, seed producers have major stake and role. Technical hand holding and financial support might be necessary to promote seed infrastructure in Telangana.
* **Input suppliers :** They constitute suppliers of crafts and gears, ice, and other necessary inputs. With conventional fisheries practices in predominance, emergence of this stake holders is yet to be seen/reckoned. Excepting ice producers and dealers of fishing nets and craft makers including coracles etc, presence/ participation other input dealers is absent/sporadic. Presence of such agencies is not visible and their operations are not organised. With new schemes/ programmes being introduced, role of input suppliers especially of aqua feed and health care product dealers is expected to be essential.
* **Fish Aggregators:** These are one of the key primary market channel stakeholders with very responsible stake of linking fishers produce to the final destination through prevailing market channels. They have a major and important role and stake in the sector. But for the aggregators, the fishermen/ FCS would have found it extremely difficult to dispose off/ channelize the fish to find market. Presence of large number of aggregators has facilitated easy disposal . However, their set up/ operations is scarred and conventional thus limiting their volume of trade. Since they have informal arrangements between fishermen and themselves, sustainability of the system could be affected with increased volume of fish production.
* **Wholesalers** : Though they have high stake in the supply chain, they play secondary role in the sector growth. Their interests are limited to their trade and their involvement is not visible in so far as sector growth is concerned; However, an important role of these agencies is providing financial assistance to fishermen thereby keeping them satisfied .
* **Local money lenders:** This segment of stake holders does not have direct stake in fisheries activities but yet, they play major role in sustaining the activity by advancing money to the needy fishermen. However, in the process, they do exploit the fishermen by offering lower price for fish or where they are not involved in trading in fish, they collect huge interest in the absence of any check. This section of the players gains without losing anything.
* **DFCS/ Fisheries Federation :** These agencies are promoted only to promote fisheries sector and protect producers interests. They are obliged to support the FCS/ their members in all aspects of fisheries. However, there does not appear to be any evidence of their fulfilling their obligations. The DFCS and FCS do not seem to be going together. The Federation, however, is able to fulfil some of its obligations in a small way but it has miles to go.
* **KVKS/NGOS :** As of now, excepting a selected few NGO KVKs and SAU KVk’s, most of the NGO’s / agencies have not been seen to be actively engaged in fisheries sector activities except for providing some training support on a sponsorship basis. Their roles and level of involvement do not seem to be clearly spelt. Social mobilisation and human resources development being crucial for accelerated sector growth, these Agencies need to be roped in by the DOF to support them in wide ranging promotional programmes.
* **Financial Institutions :** At present the banks and other financial intermediaries are not seen to be participating in the sector growth due to a number of reasons. Their role as money-providers/ resource suppliers is very imminent especially to promote aquaculture and other support activities.