Ref. Ares(2019)1077116 - 21/02/2019

Deliverable No. 7.7

Project acronym:

PrimeFish

Project title:

“Training package: all material for training"

Grant agreement No: **635761**

This project has received funding from European Union´s Horizon 2020 research and innovation programme.

Start date of project: **1st March 2015**

Duration: **48 months**

Due date of deliverable: 31/12/2018
Submission date: 21/02/2019
File Name: PrimeFish_D7_7_Training package all material for training
Revision number: 01
Document status: Final[1]
Dissemination Level: PU[2]

Revision Control

Role	Name	Organisation	Date	File suffix[3]
Authors	Björn Suckow, Imke Matullat	TTZ	12/02/2019	BS, IM
Authors	Mercedes Fernández, Rosa Chapela, José L. Santiago	CETMAR	06/02/2019	MF, RC, JL
WP leader	Rosa Chapela	CETMAR	12/02/2019	RC
Reviewer	Kolbrún Sveinsdóttir	MATIS	12/02/2019	KS
Coordinator	Guðmundur Stefánsson	MATIS	21/02/2019	GS

[1] Document will be a draft until it was approved by the coordinator

[2] PU: Public, PP: Restricted to other programme participants (including the Commission Services), RE: Restricted to a group specified by the consortium (including the Commission Services), CO: Confidential, only for members of the consortium (including the Commission Services)

[3] The initials of the revising individual in capital letters

PrimeFish

Deliverable D7.7

Training package: All material for training

February 21st, 2019

Executive Summary

This deliverable is a public report consisting of an overview of the training activities PrimeFish partners have carried out during the duration of the project and the training material prepared for the activities.

Education and training activities are of high priority for the PrimeFish project. All training activities in PrimeFish focus on the involvement of stakeholder and on spreading the results of the conducted research to students, young scientists and professionals and specific actors and stakeholders within the seafood sector. The training consisted of different activities and was designed to be efficient, “hands-on” and cost-effective.

The training programme included four different main activities: 1) ten webinars and demonstrations, 2) a summer school, 3) a seminar on Blue Growth and 4) quick start tutorials.

The webinars started in September 2018 and will be finalised in February 2019. The aim of these webinars was to explain the methods utilised by PrimeFish partners, data and possible applications of the results. The webinars allowed participants to test the PrimeFish tools, interact directly with the main authors of the research and access project documentation on the topic. The target group for the training tools was the seafood industry and so far, 112 people have participated in the webinars.

The topic of the second activity, the PrimeFish’s summer school, was the European Seafood Economy. The course was designed to give students, young scientist and professionals’ theoretical and practical training in topics related to the European Seafood Economy. The course was supported by lecturers from the industry. The event took place alongside the International Summer School of the University of Applied Science in Bremerhaven (Germany), 6th-10th August 2018. Ten students from Europe participated in the course.

The third training activity was the Seminar on Blue Growth, which took place on the 25th of October in Brussels. The idea behind this event was to present the innovative PrimeFish tools and discuss their potential use for the European Blue Growth strategy. The target audience was European policy makers. In total, 20 representatives participated in this seminar.

The fourth activity, the quick start tutorials, have been recorded during the webinars and were recently published on the you-tube channel and the learning platform on the project’s website. The idea behind the quick-start tutorials is to learn about outcomes

and Primefish tools that are available for the general target audience. This includes seafood companies, fishermen and public audience. The videos show how the users can start using the PrimeFish tools, main outputs and guidelines on what should be considered when searching for information on the tool.

Overall, the training activities carried out during the PrimeFish project were divided into online (webinars, tutorials) and off-line (Summer school, Seminar on Blue Growth) tools. Each training activity had a very specific target group and was tailored to that specific target group. The webinars are dedicated to seafood industry and fishermen. Through the webinars, the seafood industry got in direct contact with the PrimeFish tools. The summer school was designed for students and young scientist and the programme was developed in order to improve the skills of the students in topics dealing with the seafood sectors. It included information on legal aspects, economic aspects but also seafood related aspects like product development, sensory analysis and marketing. Information provided during this summer course and the development of an own business model during the week was intended to strengthen skills that are needed to start a career in the European seafood sector. The Seminar on Blue Growth was designed for policy makers and the tutorials are made for seafood companies as well as the general public and everybody who is interested in the PrimeFish tools and how they can be used.

From the feedback the project team received so far, it can be concluded that the activities were well received by the specific target groups. The information provided through the PrimeFish training materials is designed to help stakeholders in the seafood sector in different ways. It is likely that the PrimeFish tools will help product developers to create more competitive and successful products for the market and increase the turn-over of the European seafood industry.

All PrimeFish training material will be available in the Learning Resources Centre[4] until 2021 and it has the potential to be used after projects end to contribute to a positive long-term impact of PrimeFish on the seafood sector.

[4] http://primefish.eu/learning-resources

Table of Content

1 Training programme 6
1.1 Training objectives 6
1.2 Target audience 6
2 On-site training: European Seafood Economy Summer School 7
2.1 Description 7
2.2 Programme and lecturers 9
2.2.1 Detailed programme 9
2.2.2 Content of the lectures 10
2.2.3 Field trip 13
2.2.4 Development of a business case – the business lab 13
2.3 Participants 13
2.4 Representatives of the industry 14
2.5 PrimeFish Award 14
2.5.1 Team 1: Stientje's Gambas 14
2.5.2 Team 2: Alternative packaging "SeaScan" 14
2.5.3 Team 3: Freshness indicator for Seafood "Safefish" 14
3 Seminar on Blue Growth 15
4 On-line training 19
4.1 Webinars 19
4.1.1 What is your Price? PrimeFish and the Willingness to Pay for Seafood Products 21
4.1.2 Who is your Customer? PrimeFish and Customer Segmentation 21
4.1.3 PrimeFish and the Competitiveness at Country and Company Level 21
4.1.4 What is the Price Trend? PrimeFish and Price Development 22
4.1.5 PrimeFish Analysis of the Seafood Value Chain 22
4.1.6 PrimeFish Hints and Tips on the Seafood Markets 22
4.2 Quick-start tutorials 23
5 Evaluations and conclusions 23
5.1 Summer School 24
5.2 Webinars 24
6 Annex I 26
7 Annex II 29
8 Annex III 30

1 Training programme

1.1 Training objectives

All training activities in PrimeFish focus on spreading the results of the conducted research and the involvement of stakeholders. The training programme consisted of different activities and was designed to be efficient, "hands-on" and cost-effective.

The programme included four different main activities: 1) 10 webinars and demonstrations, 2) a summer school, 3) a seminar on Blue Growth and 4) quick start tutorials.

1.2 Target audience

The content of the training programme was tailor made thus the target groups for the events were different.

Target audience of the activities were all stakeholders and/or multi-actors alongside the food value chain. This means the actions were tailor made to decision-makers, fishermen, aquaculture producers, processing companies and other relevant stakeholders, including general audience. Especially, the summer school was developed to involve young researchers and young professionals. Table 1 gives an overview on the training programme and its details.

TABLE 1 OVERVIEW ON TRAINING PROGRAMME ACTIONS, OBJECTIVES AND TARGET GROUP

	Objectives	**Target Group**	**Time**
10 Webinars	Demonstrations on PrimeDSS (theoretical background and practical use)	Companies, fishing & aquaculture organisations	September 2018 – February 2019
European Seafood Economy Summer School	Involvement of young scientists and dissemination of PrimeFish's scientific work	Young researchers (environmental economy and marketing) and professionals	6.-10. August 2018
Seminar on Blue Growth	To present the major outcome to policy makers	Public service and administrators	26. October 2018
Quick start tutorials	To learn about outcomes and tools available in the website	General audience and peer educators	Start in December 2018/January 2019

2 On-site training: European Seafood Economy Summer School

2.1 Description

The intention of a summer school was to provide additional training and learning opportunities for post-graduate students and/or young professionals. It served as a further education and advanced training related to a very specific topic. The topic of PrimeFish's summer school was the competitiveness of the European seafood sector. This course was designed to give students, young scientists and professionals theoretical and practical training in topics such as the analysis of competitiveness, value chain structure, marketing of seafood products or how to develop a business proposal.

The event took place alongside the International Summer School of the University of Applied Science in Bremerhaven (Germany) on 6th to 10th of August 2018.

The programme (details in the section 2.2) was composed of a theoretical part in the morning, followed by a presentation by a representative of a company or organisation during lunchtime. During the course, representatives from PrimeFishs' IRG Royal Greenland, Messe Bremen, Transgourmet Deutschland and Bundesverband der Fischwirtschaft gave a presentation on their strategies to tackle the challenges on the European fish and seafood sector. A business lab took place during the afternoons. The idea of the business lab was to develop a business model based on the Canvas business model. This model suggests a systematic development and integration of single business model fragments into a comprehensive and overall business model. The lecture part of the summer school was conducted by partners of the PrimeFish consortium: CETMAR, University of Parma, University of Pavia, University of Stirling, Aalborg University, Nha Trang University and TTZ. The industry was involved via participation of members from PrimeFish Industry Reference Group (IRG) and other external companies that were interested in the PrimeFish results.

The main objective of the summer school was to support the development of the skills needed to develop a career in the seafood sector while creating a business, pitching it to a professional panel, with the aim to win the PrimeFish Award for best business case. The project outcomes were also disseminated, and the participants used the PrimeFish tools, the PrimeDSS, to develop their projects.

A field trip to a local supermarket Edeka was organised on Wednesday afternoon in order to give the students an overview on the seafood attributes, presentations of products, prices and marketing on the German market.

Promotion was launched in January on the Fish International 2018 with a “save-the-date” flyer (see appendix). The detailed programme was developed during spring 2018 and finalized in May 2018. In June the promotion for the event started through a marketing campaign at social media, on partners’ websites and through key potential organizations interested as well.

The registration was enabled through the website of University of Applied Science in Bremerhaven. Thus, the students were able to beneficiate from the same low price accommodation as other applicants to the International Summer School from the University of Applied Science.

This project has received funding from the European Union's Horizon 2020 research and innovation program under grant agreement No 635761

2.2 Programme and lecturers

2.2.1 Detailed programme

Draft: European Seafood Economy Summer School - Bremerhaven						
	Hours	Monday 6	Tuesday 7	Wednesday 8	Thursday 9	Friday 10
PrimeFish Lectures	8.00– 9.00		**The Seafood Value Chain** John Bostock, U. Stirling (3 h)	**Product Development and Consumers' Attitudes**	**Market research: Willingness to Pay for Seafood Products**	
	9.00 – 12.00	**Welcome and introduction. The PrimeFish project** Rosa Chapela, CETMAR (15') Selection of working groups (30')	**International Seafood Trade: the Value Chain of Pangasius** Thong Tien Nguyen, U. Nha Trang (1h)	Imke Matullat, TTZ (1h)	Cristina Mora, U. Parma (4 h)	**Final presentations of students' projects** (15 minutes per project)
		The Impact of the Legal Framework on the Seafood Sector Soren Q. Eliasen, U. Aalborg (1h 30)		**Consumers' Attitudes and Market Niches for Seafood Products** Birgit Hagen, U. Pavia (3 h)		
		Economic Performance of Seafood Industries Thong Tien Nguyen, U. Nha Trang (45')				
IRG case-studies	12.00 –12.30	**Royal Greenland** (www.royalgreenland.com)	**Industry, tbc**	**TransGourmet** (www.transgourmet.de)	**Friesenkrone** (www.friesenkrone.com)	**Prize "Best Business project"**
	12.30– 13.30	Lunch	Lunch	Lunch	Lunch	

FIGURE 1 DETAILED MORNING PROGRAMME

	Hours	Monday 6	Tuesday 7	Wednesday 8	Thursday 9
Business Lab (Canvas Model)	13.30–16.30	**Stakeholders in the Seafood Sector** Rosa Chapela, CETMAR (15')	**The Business Canvas Model, the Economic Perspective** Jose L. Santiago, CETMAR (15')	**Sensory Aspects of the Seafood Products** Imke Matullat TTZ (1 h)	**The Business Canvas Model, the Environmental and Social Perspective** Jose L. Santiago, CETMAR (15')
				Group work	
		PrimeDSS (30') TTZ / CETMAR	**Group work**		**Group work**
		The Business Canvas Model Jose L. Santiago, CETMAR (15')			
		Group work			

FIGURE 2 DETAILED AFTERNOON PROGRAMME

All participants that finished the course received a diploma attesting their participation (see Annex II) and recommending its validation for 2ECTS in recognition of the 30 hours of training. The lecturers received similar certifications.

2.2.2 Content of the lectures

The following section describes the lecturers and the content of their lectures in order of their appearance during the summer school. All detailed presentations are available through the Learning Resource Centre on the PrimeFish website (http://www.primefish.eu/content/european-seafood-economy-summer-school).

2.2.2.1 Soren Q. Eliasen - The Impact of the Legal Framework on the Seafood Sector

The lecture starts from a broader presentation of institutions as different types of mechanisms to coordinate behaviour. Various formal and informal institutions form the framework for doing business – also in the seafood sector. Some are more or less formalised to coordinate activities in the specific value chain, while others are strongly formalised in laws and regulations - although even laws sometimes are interpreted, implemented and practiced differently between countries and regions. The main part of the lecturer focused on the formalised legal framework, which ensures working conditions - an even playing field as well as barriers for the seafood businesses. Laws and regulations at supra-national level, EU-level and national/local level for the different types of seafood related business.

2.2.2.2 Thong Tien Nguyen - Economic Performance of Seafood Industries

The lecture provided students an overall status of the world's seafood industry and conditions of doing business in seafood. It covered issues regarding to the world's fisheries and aquaculture from production to marketing and consumption. The lecturer introduced the world status of production, market demand and emerging issues, with a focus on European fisheries and aquaculture and demand. Students were introduced to the data sources and data collections for their business assignments in seafood sectors.

2.2.2.3 Rosa Chapela – Stakeholders in the Seafood Sector

The lecture introduced the different stakeholders influencing the competitiveness of the aquaculture and fisheries sector. Whether working at a local or international company or institution, policies and operating practices influence the daily activity of seafood companies. Unlike other sectors, international institutions, industrial organizations, aquaculture producers, processors, trade and retailers, policy makers or civil society play decisive roles in the European seafood sector. Attendants were introduced to these profiles though a quick stakeholder overview, where the role of different agents in the seafood value chain and how their participation can improve the competitiveness of this sector were analysed.

2.2.2.4 Jose L. Santiago - The Business Canvas Model

The lecture sets the baseline to address the student ideas about their Business model/Marketing Plan on seafood products and/or services. The Canvas model guides the lecture but also additional layers of environmental and social sustainability were added to extend the model. The main part of the lecturer focused on how to make value proposals for the seafood market stakeholders. Practical examples from seafood companies were introduced in order to exemplify the concepts.

2.2.2.5 John Bostock – The seafood value chain

The presentation focused on understanding seafood value chains and how their analysis can help companies to develop their strategic position within them. Issues covered were include the general structure of different seafood value chains; tools for value chain analysis; key differences between aquaculture and capture fisheries production as supplies of raw material; how these value chains are shaped by responses to different internal (i.e. company) and external factors; and opportunities and constraints for value addition along the chain. Case studies in this session especially focused on farmed salmon value chains, with examples from wild capture fisheries and other species introduced as appropriate. These for instance examined competition theory and specifically how strategic choices around price-leadership or niche-differentiation correlates with enterprise scale and industry concentration.

2.2.2.6 Thong Tien Nguyen - International Seafood Trade: the Value Chain of Pangasius

The lecture illustrated the application of value chain analysis framework to a specific case study. Students learned how to map the input-output information and to identify the mechanism of value chain coordination. Strategies of upgrading small fisheries and aquaculture to global value chain were introduced. The successful story of pangasius aquaculture, which is farmed in Mekong delta of Southeast Asia, were analysed. The current problems of the pangasius industry was discussed and illustrated by specifically strategic positioning of leading pangasius firms.

2.2.2.7 Imke Matullat – Sensory aspects of Seafood Products

Sensory aspects of fish and seafood products are highly influenced by the sensory properties of the fish and the ingredients. In this presentation the students learned the main principles of sensory evaluations and the sensory properties of the focus species in PrimeFish. The lecture covered sensory methods for quality assurance and mentioned on consumer and marketing related methods such as hedonic testing, preference mapping with consumer based profiling methods like Napping, Flash Profiling and CATA. Above that the concept of sensory claims was introduced. The theory was supported by some tastings in order to give the students the experience of sensory analysis in practice.

2.2.2.8 Imke Matullat - Product Development and Consumers' Attitudes

The lecture covered the theoretical background of different concepts for product development in the food industry with special focus on the sea food sector. As sensory aspects of new developed food products are of high importance as they are guarantee long-term product success, multi-sensual product development were presented in detail. During the presentation, examples of product success and product flops were presented and discussed.

2.2.2.9 Birgit Hagen - Consumers' Attitudes and Market Niches for Seafood Products

In today's fragmented and hypercompetitive economic landscape marketers have to tailor products and marketing mix to suit the different tastes of the customers. In niche marketing, all marketing efforts are concentrated on perfectly satisfying customer expectations in small but profitable parts of market segments, i.e. niches. Niches do not "exist" but are "created" by identifying wants and expectations that are being addressed poorly or not at all by existing offerings. The competitive strategy – the niche or focus strategy - is often described with being a big fish in a small pond instead of being a small fish in a big one. The niche strategy is a viable approach for small firms in particular due to their often limited resources, or for firms at inital stages of their life cycles but it also applies to business units within large firms. During the lecture the students discussed the niche strategy and its bases, with emphasis on approaches to identifying, creating and satisfying niches. Examples were used to illustrate and discuss the topic.

2.2.2.10 Cristina Mora - Market research: Willingness to Pay for Seafood Products

The Lecture was devoted to explain what means willingness to pay and how conjoint analysis will help the researcher with the identification of utilities—values used by people making trade-offs and choosing among objects having many attributes and/or characteristics for a seafood products. The lesson was addressed to the typical sequence that one goes through to implement a conjoint study in general and in the case of Prime Fish Project. Identification of the problem, along with dimensions of the product to be studied. How many attributes are considered and what are the levels of each attribute? Develop the study protocol including all contacts, sampling and follow-up protocols. Also develop the survey and associated visual aids, products, graphics, etc. that are to be used. Develop the questionnaire and then pretest the survey and data collection activity. Evaluate the process and revise until you are satisfied with the approach, instrument, and the methodology. Using one of a variety of data collection procedures, collect the data. Process the data. Once the utilities for all attributes are determined for all respondents the analysis of the utility data can begin. Pro and cons to conjoint for willingness to pay evaluation.

2.2.3 Field trip

Ideas for new product developments or investigation of upcoming trends are crucial for success on the market. The lecturers Brigit Hagen and Cristina Mora have taken the students to a super market during the summer school. The intention of this field trip was that the students get an overview on the fish and seafood market in Germany towards products with a Mediterranean touch. After the shopping tour the students were able to ask the deputy store manager about the seafood products on the German market from the retailers' point of view.

Supermarkt: EDEKA Roter Sand, Knauer, Rudloffstraße 148, 27568 Bremerhaven.

2.2.4 Development of a business case – the business lab

In the afternoon sessions, Jose L. Santiago (CETMAR) introduced the students into the business Canvass model and their different steps. During the business lab the students were able to develop their business ideas in group, detect possible challenges and barriers, explore indicators of the PrimeDSS that could support their business proposals and to work on their presentations for the final pitch day.

2.3 Participants

Ten participants registered at the summer school and participated in the complete course. They came from different disciplines including economics, biology and technical engineering.

2.4 Representatives of the industry

The summer school was supported from the industry as well. At every lecture day, a representative from the industry presented the seafood market from their point of view.

2.5 PrimeFish Award

During the week, the participants built groups and developed a business case according to the concept of Canvass Business Modell explained by José L. Santiago from CETMAR.

Overall, three groups have been created and presented the following ideas:

2.5.1 Team 1: Stientje's Gambas

Main idea behind this business model was that most of the king prawns in Germany are imported from Asia, and fish and seafood products are recognised by the consumer to be less healthy due to use of antibiotics e.g.. That is why consumers are looking for an alternative that is both healthy and sustainable. At Stientje's Gambas the prawns will be cultivated in special ponds which have special properties (e.g. water turnover, filtering) and the use of antibiotics is not necessary. Above that, the systems needs less water and use renewable energy that make the cultivation more sustainable.

2.5.2 Team 2: Alternative packaging "SeaScan"

Team 2 concentrated on the fact that plastic littering is heavy and still increasing in the oceans. They had the idea to develop an alternative and compostable packaging material that can be used at the fishmonger or in the retail. This will help to reduce the plastic litter at households and retailer.

2.5.3 Team 3: Freshness indicator for Seafood "Safefish"

Team 3 had an innovation idea for packaging, but they wanted to measure spoilage component like TVBN by an indicator on the package.

The business concept were evaluated by representatives of the consortium (CETMAR, TTZ) and from IRG (Royal Greenland)

FIGURE 3 STUDENT GROUP WITH REPRESENTATIVES OF PRIMEFISH AT FINAL DATE

All groups finalised their project and performed persuasive pitches. The winning group was team 3 on the basis of being the most relevant proposal for industry, retailers and consumers.

3 Seminar on Blue Growth

The Seminar on Blue Growth was developed by CETMAR and took place on the 25th of October in Brussels. The aim of the seminar was to present the project results to policies makers and to discuss the further and potential use after projects end with them. A total of 20 representatives of the DG Research and Innovation, DG Mare, the Research Executive Agency (REA), the Food and Agriculture Organisation of the United Nations, Standing Committee on Agricultural Research on Fish (SCAR), Europêche and the Market Advisory Council explored possible ways to use the outputs of PrimeFish in policy initiatives and discussed the possibilities with the PrimeFish representatives.

The PrimeFish tool was presented and discussed. It is one of PrimeFishs' major outcome and brings a wide range of application for stakeholders. The agenda is shown in figure 4. In the workshop, PrimeFish joined policy makers and members of advisory bodies linked to the Blue Growth strategy. The workshop was organised by CETMAR and representatives of PrimeFish presented the catalogue of results.

ALIGNING THE PRIMEFISH CONTRIBUTIONS TO THE BLUE GROWTH STRATEGY

Brussels · 25 Oct 2018
Fundacion Galicia Europa
Rue de la Loi, 38 2º

info@primefish.eu

Draft Agenda

	Sessions	Speaker
09.00 – 09.05	**Welcome**	*Rosa Chapela, CETMAR*
09.05 – 09.25	**Opening addresses**	*Sigi Gruber, European Commission, DG Research & Innovation, Head of Unit, Marine Resources*
		DG-MARE representative
		Guðmundur Stefánsson, MATIS
09.25 – 09.40	**Keynote address: Sveinn Margeirsson**	*Sveinn Margeirsson, MATIS*
09.40 – 09.55	**The Fisheries and Aquaculture Competitiveness Index (FACI)**	*Oystein Hermansen, Nofima*
09.55 – 10.10	**Voluntary labelling and certification; Industry strategic positioning**	*Francis Murray, Uni. Stirling*
10.10 – 10.25	**Impact of seafood consumption on sustainability and consumers' health**	*Sterenn Lucas, INRA*
10.25 – 10.40	**Effects of negative press on consumption**	*Guðmundur Stefánsson, MATIS*
10.40 – 11.10	**Coffee Break**	
11.10 – 11.25	**Innovative price analysis and willingness-to-pay**	*Davide Menozzi, Uni. Parma*
11.25 – 11.40	**Market segmentation and success analysis**	*Birgit Hagen, Uni. Pavia*
11.40 – 11.50	**Questions & Answers**	
11.50 – 12.10	**Showcase of PrimeFish tools**	*Heiner Lehr, Syntesa*
12.10 – 12.20	**The exploitation of PrimeFish tools by the industry**	*Paul S. Valle, Kontali*
12.20 - 12.50	**Policy catalogue. Creating shared value** Round tables to identify potential use of outputs	*Rosa Chapela, José L. Santiago and Mercedes Fernández, CETMAR*
12.50 – 13.00	**Conclusions and wrap-up**	*Rosa Chapela, CETMAR*
13.00 – 14.00	**Networking Lunch**	

The event in a nutshell

This working session aims to build upon the PrimeFish outputs to enable its exploitation by the policy community. Round tables and interactive sessions will support the participation of attendants. Any comment or question on the content or guidelines of the event can be send to info@primefish.eu.

FIGURE 4 DETAILED AGENDA OF THE WORK SHOP

The workshop took a glance at a number of PrimeFish outputs, in particular, a new index to measure competitiveness in the seafood sector, voluntary labelling in the seafood sector, effects of negative press on consumption, impact of seafood consumption on consumer's health, and market analysis. The session also hosted an interactive dynamic with which participants suggested possible ways to incorporate PrimeFish results to their lines of action.

The interactive session "Policy Catalogue. Creating Shared Value" supported participants to scope and prioritize current policy initiatives PrimeFish could provide with contributions:

- Consumer labels on products farmed in the EU or caught by EU vessels
- Discussion on the possibility of an EU eco-label
- EU marketing standards
- Promotional campaigns on seafood consumption in the framework of the European Maritime Fisheries Fund (EMFF)

FIGURE 5 PARTICIPANTS IN THE SEMINAR OF BLUE GROWTH

As one of the main outputs of the meeting, the representative of the Market Advisory Council (MAC) ensured the interest of their organisation in holding a PrimeFish-focused workshop in May 2019 to further explore with main research PrimeFish outputs related to labelling of seafood products, market trends and possible ways to promote fish consumption.

A summary of the meeting conveying main conclusions, opportunities in the research and dissemination field and background material is available on the following link:

http://www.primefish.eu/sites/sites/default/files/pf_bg_report_251018_v6.pdf

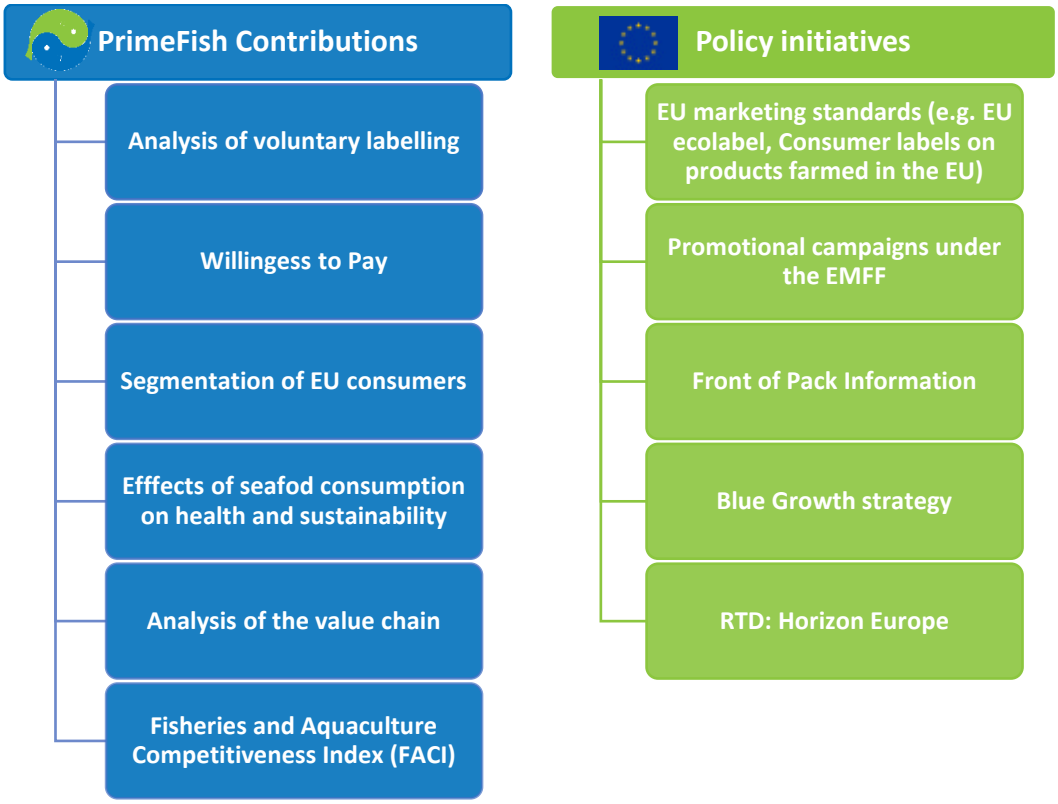


FIGURE 6 POLICY CONTRIBUTIONS OF PRIMEFISH

4 On-line training

As on-line training methodologies, the webinars were held in Autumn 2018 in collaboration with main authors of each research. The webinars in work package 7 were developed to explain the methods utilised by PrimeFish partners, data and possible applications of these results. Participants were able to test PrimeFish tools, interact directly with the main authors of the research and access main project documentation on the topic.

4.1 Webinars

Programme of the webinars was structures separating those webinars focus on the tool, from those focus on market research results, which were held in the native language of the main market addressed (Spain, France, Germany, United Kingdom). The activity counted with 112 participants, many of which participated in several webinars. The PrimeFish tools focused on the "Product Success Check" and the "Willingness to Pay" were the ones received the most attention from the audience.

Webinars centered on the tool included a practical demonstration on the use of the PrimeDSS, while those compiling market studies results at country-level compiled results of consumer segmentation and Willingness-To-Pay experiment to offer a quick overview of the market trends. These webinars were held in French, German, Spanish and English, overcoming language barriers.

Participation in each webinar was ensured with a dedicated campaign, including visuals on social media, email marketing campaigns deployed with the collaboration of partners and press releases (see Annex III). All webinars included a slot for questions from the participants.

Recordings are available through the YouTube channel of the project and the "Learning Resources Center" of the website:

http://www.primefish.eu/content/webinars-competitiveness-seafood-sector

TABLE 2 TIMETABLE OF THE WEBINARS

No	Date	Title	Facilitator	Involved partners	Number of participants
WEBINARS on PRIMEDSS **TOOLS**					
1	28th September	What is your Price? PrimeFish and the Willingness to Pay for Seafood Products	CETMAR	U.Parma, Syntesa	**14**
2	5th October	Who is your Customer? PrimeFish and Customer Segmentation	CETMAR	U.Pavia, Syntesa	**26**
3	19th October 2018	PrimeFish and the competitiveness and country and company level	TTZ	U.Iceland, Syntesa	**14**
4	11th October 2018	What is the Price Trend? PrimeFish and Price Development	CETMAR	U.Parma, Syntesa	**10**
5	27th November 2018	PrimeFish Analysis of the Seafood Value Chain	CETMAR	U.Stirling, Syntesa	**10**
WEBINARS on **MARKETS**					
6	31st October 2018	Spain: PrimeFish Hints and Tips on the Seafood Market	CETMAR	CETMAR	**9**
7	22nd November 2018	Germany: PrimeFish Hints and Tips on the Seafood Market	TTZ	CETMAR, Syntesa	**7**
8	26th November 2018	France: PrimeFish Hints and Tips on the Seafood Market	U. Savoy	CETMAR	**15**
9	28th November 2018	UK: PrimeFish Hints and Tips on the Seafood Market	U. Stirling	CETMAR	**7**

The detailed presentations of the webinar will be available on the PrimeFish website (www.primefish.eu).

Webinars has taken place via an online-platform called e-learning.cesga.es. and was administered by CETMAR. The platform offers the possibility to share the screen of one

person, upload and show presentations and communication during the webinar via chat-function or directly interaction with a microphone.

4.1.1 What is your Price? PrimeFish and the Willingness to Pay for Seafood Products

The first webinar was focused on one of the market-oriented PrimeDSS tools: The Willingness to Pay. University of Parma introduced the methodology utilised for the design of the experiment this tool is based on. Providing an analysis on consumers choices and willingness to pay for innovative features on seafood products, the survey runs on the answers of 500 respondents per country (France, Germany, Italy, Spain, United Kingdom). Participants could explore the main attributes taken into account, the choice experiment set up on-line, method and mathematical models and the results. To complement this presentation, Syntesa did a live showcase of how the tool runs, providing participants with a visual introduction to the tool, its input information and how to interpret the results.

4.1.2 Who is your Customer? PrimeFish and Customer Segmentation

Segmentation provided by the project is also focus on five European countries (France, Germany, Italy, Spain, United Kingdom). University of Pavia presented in this webinar the success analysis model that the tool is based on, as well as the multidimensional segmentation and the variables of the different EU and national-level segments. As examples, British segments self-efficacious & local ecologist and healthy convenience were introduced to participants, as well as an example on how a seafood product can fulfil the expectations of one specific segment. PrimeFish partner Syntesa showed participants how the PrimeDSS works and, specifically, how to interact with the Product Success Check feature to implement its results into their daily work.

4.1.3 PrimeFish and the Competitiveness at Country and Company Level

University of Iceland presented PrimeFish work to provide companies, policy-makers and other seafood stakeholders with an indicator on competitiveness, scoping areas for improvement as well as those factors that offer the country or company a competitive advantage. This includes the Global Competitiveness Index, overview of the Fisheries and Aquaculture Competitiveness Index, the information it offers and the results. As in other webinars, Syntesa offer a walk through the tool that enables easy access to the survey, offering users a direct evaluation of their performance through the Competitive Position Analyser.

4.1.4 What is the Price Trend? PrimeFish and Price Development

University of Parma explained the development of the model behind the Growth Risk Analyser tool in the PrimeDSS, allowing for the forecast of prices of fish in a 12 month period and possible boom and bust occurrence. Presenter explored examples of the application of the Kalman filter, the LTSs model and the limits of its application. Syntesa was in charge of the practical demonstration on how to enter the 24 values needed for the tool to work, and what different information the three graphics of results offer.

4.1.5 PrimeFish Analysis of the Seafood Value Chain

University of Stirling develop the Value Chain Analyser with the collaboration of several PrimeFish partners. Its researchers presented the idea behind the report generator, the Global Salmon Inititative (GSI) Map, and the Gross Margin Calculator. The practical explanation on how to access, use and download the results of the Value Chain Analyser was realised by Syntesa.

4.1.6 PrimeFish Hints and Tips on the Seafood Markets

Specific webinars were organised for each seafood market: France, Germany, Spain and United Kingdom. These webinars compiled results of the Succes Product Check and the Willingness to Pay for each market, outlining main market trends and showing participants how to get registered, access and interpret the results.

FIGURE 7 EXAMPLE OF QUESTION ADDRESSED BY PARTICIPANT IN THE WEBINAR "PRIMEFISH AND THE COMPETITIVENESS AT COUNTRY AND COMPANY LEVEL.

4.2 Quick-start tutorials

The idea behind the quick-start tutorials is to learn about outcomes and Primefish tools that are available for the general target audience. This includes seafood companies, fisher men or even public audience. They are friendly and short video-tutorials to learn about outcomes and tools available in the website (Learning Resources Centre). The tutorials have been recorded during the dedicated session included in each webinar focus on the tools:

- Success Product Check
- Willingness to Pay
- Value Chain Analyser
- Competitive Position Analyser
- Growth Risk Analyser

Videos are short introductions in which PrimeFish partner Syntesa show how the users can start using the tools, main outputs and guidelines they should take into account when searching for information on the tool.

Recordings are available through the YouTube channel of the project and the "Learning Resources Center" of its website:

http://www.primefish.eu/content/quick-start-tutorials

5 Evaluations and conclusions

Overall, all trainings activities and materials, which have taken place or have been developed during the course of the project, were well accepted by the specific target groups. In some of the activities (summer school, webinars), direct evaluation was carried out through questionnaires. However, the project group have no direct feedback from the Blue Growth seminar, but it can be deducted that it was a success and well accepted, based on the discussions and conclusions from this seminar (see: http://www.primefish.eu/sites/sites/default/files/pf_bg_report_251018_v6.pdf). Especially this activity has laid the basis for a long-term impact of PrimeFishs results. So far, the tutorials have not been evaluated yet as they have very recently been released online. In any case, they are a very good tool to guarantee the dissemination over projects life-time and it is in plan to review the feedback of users on the you-tube channel.

5.1 Summer School

The summer school was well evaluated from the participants and they rated the course mainly with “very good” and “excellent”. In their evaluation, they emphasized that especially the attendees of the industry completed the picture of the seafood industry sectors. In addition, the field trip to the super market and the discussion with the deputy store manager helped the students to understand seafood market in Germany.

In particular, the “Value chain analyser” was the preferred tool (40%), with some participants assessing it as the most “user-friendly”, together with positive votes for the Willingness to Pay (WTP), Product Success Check (PSC) and Competitive Position Analyser (CPA). The least preferred: the Growth Risk Analyser (“We need to input the information. Not explained how exactly in what order, etc. Not managed to use it.”)

Overall, the tool was assessed as having a good design and being easy to navigate through, although some of them would need some training.

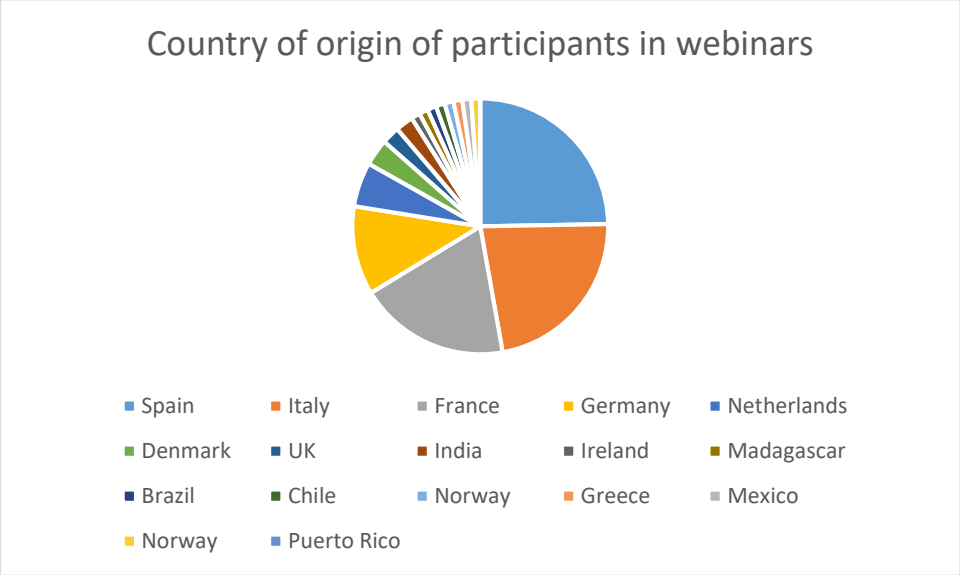
They rated it as a very useful tool to be used when developing business proposals, mainly because of the market information.

5.2 Webinars

The webinars are a good option to receive deeper information and theory behind the PrimeDSS system. Especially the webinars in the national languages received a good feedback, because for some people (especially those from traditional and smaller companies) highlighted the difficulty to follow a presentation on that topic in English. Most of participants were eager to receive the background material, participated in several webinars and showed their interest on accessing the recordings.

Most participants were residents in Spain (n=22), Italy (n=20), France (n=17), Germany (n=10) and Netherlands (n=5).

Attendants presented a diversified profile: many were PhD or students at universities taking part in the project. Also representatives of the industry (Transgourmet, Palacio de Oriente, France Filière Pêche) or organisations (EFFoST).



6 Annex I

FIGURE 6 SAVE THE DATE FLYER

PrimeFish
European
Seafood
Economy
Summer School
@ University of Applied Sciences
Bremerhaven
06.08.-10.08.2018
Are you interested in gaining in-depth knowledge in the European and worldwide seafood market? Do you consider a career in seafood economy?
Then join the unique European Seafood Economy Summer School!
WHAT you can expect:
– Lectures by international seafood economy & marketing experts
– A workshop (the Business Lab), access to guidelines and tools to develop your own business proposal
– Networking opportunities with industry representatives and researchers
– Development of entrepreneurial skills: team work, drafting of proposals, pitching projects
– 2 ECTS Credit Points *
WHO can participate:
The summer school is designed for students, graduates, post graduates and young professionals from the fields of economy, business, finance and other related fields. Lessons and workshop will be in English.
* Please note that the University of Applied Sciences Bremerhaven can onlyrecommend that home institutions award participants with 2 ECTS!

PrimeFish

European Seafood Economy Summer School

Participants will explore a wide range of current issues and pressing challenges for the seafood sector, such as the economic performance of industries, the seafood value chain, international trade (focused on the pangasius case), product development, market research or sensory aspects of the seafood products.

The program includes the participation of the following experts:

- Rosa Chapela, Head of the Fisheries Socioeconomic Department at the CETMAR- Technological Centre of the Sea (Spain)
- José L. Santiago, Project Officer of PrimeFish at the CETMAR- Technological Centre of the Sea (Spain)
- Thong Tien Nguyen, Senior Researcher at Nha Trang University (Vietnam) and Syntesa Partners & Associates (Denmark)
- Soren Q. Eliasen, Associate Professor IFM –Blue Governance Centre, Department of Planning, Aalborg University (Denmark)
- Imke Matullat, Project Manager at ttz Bremerhaven (Germany)
- Cristina Mora, Associate Professor in Food Marketing at Institute of Drug and Food, University of Parma (Italy)
- John Bostock, MSc Aquaculture Programmes Director & Senior Consultant at the Institute of Aquaculture, University of Stirling (Scotland, United Kingdom)
- Birgit Hagen, Assistant Professor at Department of Economics and Management, University of Pavia (Italy)

The course itself is FREE OF CHARGE.
The stay can be either self-organized or booked separately through an optional fee for accomondation, meals and social program. Registration through homepage of Hochschule Bremerhaven (www.hs-bremerhaven.de).

If you like to register you can also send an email to: aquaculture@ttz-bremerhaven.de for further information on registration procedure.

This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under Grant Agreement No 635761

www.primefish.eu

This project has received funding from the European Union's Horizon 2020 research and innovation program under grant agreement No 635761

7 Annex II

PrimeFish

Hochschule Bremerhaven

Bremerhaven International Summer School 2018

Certificate of Studies for the course

European Seafood Economy Summer School

«MsMr» «First_Name» «Last_Name»

has successfully participated in the European Seafood Economy Summer School

Workload hours: 30
ECTS credit points: 2

Bremerhaven, 10th of August 2018

Prof. Dr. Gerhard Feldmeier
Director Summer School

Rosa Chapela
Head of the Fisheries Socioeconomic Department
Centro Tecnológico del Mar - Fundación CETMAR

This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under Grant Agreement No. 63576

8 Annex III

PrimeFish Webinars
September
- What is your Price? PrimeFish and the Willingness to Pay for Seafood Products
October
- Who is your Customer? PrimeFish and Customer Segmentation
- Are you Competitive? PrimeFish and the Competitiveness at Country and Company Level
- What is the Price Trend? PrimeFish and Price Development
- How is the Value Chain? PrimeFish Analysis of the Seafood Sector
- Spain: PrimeFish Hints and Tips on the Seafood Market
November
- Italy: PrimeFish Hints and Tips on the Seafood Market
- Germany: PrimeFish Hints and Tips on the Seafood Market
- France: PrimeFish Hints and Tips on the Seafood Market
- UK: PrimeFish Hints and Tips on the Seafood Market
December
- The Case for Sustainability in the Seafood Sector
Registration
info@primefish.eu
FUNDED BY THE HORIZON 2020 PROGRAMME

WHAT IS YOUR PRICE? PRIMEFISH AND THE WILLINGNESS TO PAY FOR SEAFOOD PRODUCTS
Date: Friday 28 September
Hour: 13.00 - 13.30 (Central European Summer Time - CEST)
Hosts: University of Parma, Syntesa, CETMAR
Language: English

WHO IS YOUR CUSTOMER? PRIMEFISH AND CUSTOMER SEGMENTATION
Date: Friday 5 October
Hour: 13.00 - 13.30 (Central European Summer Time- CEST)
Hosts: University of Pavia, Syntesa, CETMAR
Language: English

WHAT IS THE PRICE TREND? PRIMEFISH AND PRICE DEVELOPMENT
Date: Thursday 11 October
Hour: 13.00 - 13.30 (Central European Summer Time- CEST)
Hosts: University of Parma, Syntesa, CETMAR
Language: English

ARE YOU COMPETITIVE? PRIMEFISH AND THE COMPETITIVENESS AT COUNTRY AND COMPANY-LEVEL
Date: Friday 19 October
Hour: 13.00 - 13.30 (Central European Summer Time- CEST)
Hosts: University of Iceland, Syntesa, TTZ, CETMAR
Language: English

PRIMEFISH ANALYSIS OF THE SEAFOOD VALUE CHAIN
Date: 27 November
Hour: 13.00 - 13.30 (CET)
12.00 - 12.30 (UK time)
Host : University of Stirling
Language: English

"PRIMEFISH:
EL MERCADO ESPAÑOL DE PRODUCTOS DEL MAR"
Fecha: Miércoles 31 Octubre
Hora: 13.00 - 13.30 (Central European Summer Time- CEST)
Imparte: CETMAR
Idioma: Castellano

ITALIA:
SUGGERIMENTI E CONSIGLI DAL PROGETTO PRIMEFISH NELL'AMBITO DEL MERCATO ITTICO
Data: 11 dicembre
Hora: 13.00 - 13.30 (CET)
Relatori: Davide Menozzi, Università di Parma
Lingua: Italiano

FRANCE: DES CONSEILS ET DES PISTES SUR LE MARCHE DES PRODUITS DE LA MER
Date: 26 Novembre
Heure: 13.00 - 13.30 (CET)
Présenté par : Sterenn Lucas, INRA
Langue: Français

UK: PRIMEFISH HINTS AND TIPS ON THE SEAFOOD MARKET
Date: 28 November
Hour: 13.00 - 13.30 (CET)
12.00 - 12.30 (UK time)
Host : University of Stirling
Language: English

GERMANY: PRIMEFISH HINTS AND TIPS ON THE SEAFOOD MARKET
Date: Thursday 22 November
Hour: 13.00 - 13.30 (Central European Summer Time- CEST)
Hosts: TTZ, Syntesa
Language: German