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shing industry's performance cannot be assessed based on economic results cial indicators alone. So each country chooses its own way of distributing cic biological resources and the only feature common to all the national es is long-term stability of the chosen option. Therefore, the correct choice has been made must be appraised taking into account cate of populations of aquatic biological resources, the socio-economic health eastal regions, the financial health of the fishing industry and the contribution by the fishing industry to developing related sectors of the economy.
ssion topics:
onomic efficiency and social stability: how to balance them. sheries management tools: biologically justified allowable catch and onomically viable catch. what extent is absolute competition possible in the natural resource sectors the economy?
ow the fisheries legislation has evolved: national examples. Itio of national and private interests in the fishing industry.
kers: nitry Patrushev, Minister of Agriculture of the Russian Federation (welcoming eech); a Shestakov, Deputy Minister of Agriculture of the Russian Federation, Head the Federal Agency for Fisheries, "World fisheries: new realities and great
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- 5. Vladimir Ilyukhin, Governor of Kamchatka Territory, "Kamchatka Peninsula: A Resource Opening Up Opportunities";
- 6. Igor Orlov, Governor of the Arkhangelsk Region, "Bringing the Arctic and the Far East together: prospects for cooperation";
- Jacques Verborgh, President, North East Atlantic Fisheries Commission (NEAFC), "NEAFC: present and future";
- 8. Suam Kim, President, North Pacific Anadromous Fish Commission (NPAFC), "Salmon, economy and population";
- 9. Vladimir Sitnov, Senior Vice President, Corporate and Investment Business Block, PJSC Sberbank, "Fishing industry. Sberbank is an ocean of opportunities";

Front-row speaker:

10. Marcio Castro de Souza, Senior Fishery Officer, FAO, "Overview of international trade and markets for fish and fishery products".

Coffee break from 13:00 to 13:30

Pavilion F

Hall F2

13:30-15:30

Roundtable No. 1 "Digitalization as a Tool for the Transformation of the Fisheries Industry"

Organizers:







Moderator:

Bogdan Shaldugin, Managing Partner, Fishery Strategy Consulting (FSC) **Legend:** Digitalization poses a serious challenge that will alter the value chain as many traditional sectors of the economy disappear, and we should be prepared for this.

Large volumes of information (Big Data) have become available with the introduction of IT solutions and integrated platforms for data processing and interpretation. This significantly enhances the quality and speed of decision-making in an environment where the resource base is declining, a large number of remote sites need to be monitored and controlled, and fishing and processing are becoming more efficient. The connection between all the components of the production chain, all the way up to retail outlets, to the global data transmission network has created brand new opportunities.

This truly comprehensive information will help take the industry to a new level of development and build business models with minimal risks.

Discussion topics:

- Current state and prospects for development of fishing support information systems: online fishing logs, satellite monitoring and introduction of international online reporting. Digital technologies to ensure product traceability;
- 2. Effective detection and control, use of advanced information technologies, of vessels engaged in IUU fishing. Analytical systems for detecting and preventing IUU fishing;
- 3. Electronic services for users of aquatic biological resources and representatives of executive authorities as a tool for informed management decision-making.

Speakers:

- 1. Artem Vilkin, Head of the Centre of Fishery Monitoring and Communications, "Twenty years of development of the Industry Monitoring System: prerequisites for creation and the current state of and prospects for development";
- 2. Mr. Thord Munsen, Norway, "History of introducing online fishing logs in Norway, current state and prospects";
- 3. Maxim Buzmakov, Director for Development, 000 Trading Technologies Group, "Online trading platforms for sale of aquatic biological resources and products made from them";

- 4. Dmitry Bakanov, General Director, Satellite System Gonets, "Use of domestic satellite systems in the field of fisheries", experience of using and implementing the Gonets satellite system";
- Mrs. Aslaug Eir Holmgeirsdottir, Head of Supervision, Icelandic Coast Guard, "Digitalization of the fishing industry";
- Mr. Sebastian Wazzi BAADER (Germany), Mr. Thomas Brandt, Head of Digitization, "Digitalization as a solution for the fish industry";
- 7. Mr. Jongil Jung, Inspector/Assistant Director, the Fisheries Monitoring Centre, the Ministry of Oceans and Fisheries of the Republic of Korea. "Korean Aquatic Fisheries Monitoring System: Using advanced ICT and satellite communications to reduce IUU fishing effectively".

Pavilion F Hall F3

13:30-15:30

Roundtable No. 1A "How to sell fish properly"
Organizers:



Moderator:

Roman Karmanov, Deputy General Director, Komsomolskaya Pravda Publishing House,

Peter Bos, General Director, A. Espersen LLC **Legend:** For Russia, fish are a natural yet underestimated treasure. They have always been and will continue to be so. Fish are a self-replenishing natural resource that, if used wisely, will be able to feed many generations of our country's people. Today, many consumers are experiencing existential loneliness. Loss of roots, traditions, grandmother's recipes. Fish consumption is falling, people are choosing cheaper sources of protein. Children hardly ever eat fish, as the continuity of consumption between generations has been lost. They do not know what good fish is.

Problems: Poor marketing, uneducated buyers, indifferent manufacturers and sellers. The industry has no interest in educating the buyer so there is no clear interest in or understanding of the product and its varieties. All PR in the industry is based on references to the past, yet these will soon stop having any effect, as the younger generation does not understand these allusions to the past.

Discussion topics:

- 1. What fish is for sale?
- 2. What do fishermen give to consumers in Russia today and what in Asia and Europe?
- 3. Building a brand market: from the sea to store shelves. Brand promotion on the market.
- 4. To whom to sell and how to sell.
- 5. How to teach eating fish.
- 6. Presentation of the Main Fish of the Country project.
- 7. Our Fish 2.0 (successful cases of production and promotion).

Speakers:

- 1. Petr Savchuk, Deputy Head, Federal Agency for Fisheries, "What, in general, is 'fish for sale'?";
- 2. German Zverev, President, All-Russia Association of Fisheries Enterprises, Entrepreneurs and Exporters, Vice President, Russian Union of Industrialists and Entrepreneurs, "Will we feed Russia with fish?";
- 3. Valery Fedorov, General Director, Russian Public Opinion Research Center (VCIOM), "Who is going to eat fish in Russia in ten years' time?";
- 4. Alexander Yefremov, General Director, Dobroflot Group, "Three whales of the civilized market";
- 5. Pavel Mezhericher, Managing Partner, IKRA group, "Potential development of the domestic market for fish and seafood consumption in the Russian Federation";

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- 6. Polina Kirova, Director of Development, Rybset chain, "To whom to sell and how
- 7. Peter Bos, General Director, A. Espersen LLC, "Fish processing: our real needs";
- 8. Polina Belelina, Sberbank (Industry Transformation Technologies), "Sales tools and technologies using Big Data capabilities";

Our Fish 2.0: successful cases:

- 9. Oleg Barmin, Owner, Lipko-Sladko brand and Agenda. Media, "From the sea to store shelves. Promoting the trade mark on the market";
- 10. Alexander Turovtsev, Executive Director, Antey Group;
- 11. Vyacheslav Sturzu, General Director, NOREBO RU JSC.

Coffee break from 15:30 to 16:00

Pavilion F

Hall F2

16:00-18:00

Roundtable No. 2 "The Arctic and Antarctica: Resource Potential. Ban or Fishing, Elements of Cooperation"

Organizers:





Moderator:

Kirill Kolonchin, Director, Russian Federal Research Institute

Legend: The marine systems of the Arctic and Antarctica have a lot in common: high latitudes, significant seasonal fluctuations in light levels, extreme air and sea temperatures, and an abundance of sea ice. Yet they are substantially different in other respects and the cumulative impact of climate change on oceanographic processes and food chain dynamics is likely to alter the future of fishing there in completely different ways.

It is essential to consider the various features (including geographical, physical and biological) that define polar marine ecosystems, as well as the known and projected effects of climate change on key zooplankton species and on commercial species and existing fish resources in order to create future scenarios for fishing and managing fisheries.

It is clear that the global community needs to come up with new approaches to utilizing the aquatic biological resources of the Arctic and Antarctica in consideration of climate change.

Discussion topics:

- 1. From studying aquatic bioresources of the Northern and Southern Oceans to their comprehensive utilization.
- 2. Mutually beneficial international cooperation.
- of Fisheries and Oceanography 3. The impact of climate change on the distribution and composition of commercial types of aquatic bioresource.
 - 4. Conservation of polar ecosystems in the context of industrial development of the regions.

Speakers:

- 1. Anne Christine Brusendorff, General Secretary, International Council for the Exploration of the Sea (ICES), "Fish distribution and fishing in the waters of Russia, Denmark (Greenland) and Norway adjacent to the central Arctic Ocean using a common ICE approach";
- 2. Konstantin Bandurin, Russian Federal Research Institute of Fisheries and Oceanography (Atlantic Branch); Vladimir Belyayev, Head of the Center for International Fisheries Cooperation, Russian Federal Research Institute of Fisheries and Oceanography (Central Office); Alexander Sytov, Russian Federal Research Institute of Fisheries and Oceanography (Central Office); "Development of Russian resource studies and krill fishing in the Antarctic: problems and prospects";

- 3. Aleksey Baitalyuk, Head of the Pacific Branch of the Russian Federal Research Institute of Fisheries and Oceanography (Pacific Branch), "Development of Arctic research on aquatic biological resources";
- 4. Oleg Bulatov, Vladimir Belyayev and Igor Grigorov, Russian Federal Research Institute of Fisheries and Oceanography, "Prospects for international cooperation in the Arctic";
- 5. Oleg Bulatov and Dmitry Vasilyev, Russian Federal Research Institute of Fisheries and Oceanography (Central Office), "Norwegian and Barents Sea cod reserves dynamics":
- 6. Dmitry Churin, Russian Federal Research Institute of Fisheries and Oceanography (Atlantic Branch), "Integrated use of remote sensing methods for studying bioproductive zones in the Atlantic sector of the Antarctic";
- 7. Konstantin Pozdeyev, Director, Zemlevladelets non-profit partnership, Komi Republic, "Fishing regulation in the Arctic using the example of the endangered Russian Atlantic salmon population spawning in the Komi Republic";
- 8. Mikhail Andreyev, Chief Technology Researcher, Russian Federal Research Institute of Fisheries and Oceanography (Atlantic Branch), "Processing of Antarctic krill (Euphausia superba Dana): past, present and future";
- 9. Andrey Korotkov, Vasily Smolyanitsky, Arctic and Antarctic Research Institute, "Current changes in sea ice extent of the Southern Ocean".

11 JULY 2019 (THURSDAY) DAY TWO

09:00-10:00

Registration

Pavilion F

Hall F3

09:30-10:45

Panel session:

"New Faces of Fisheries Science. New Ideas. **New Solutions**"

Organizers:





Moderator:

Mikhail Glubokovsky, Scientific Director, Russian Federal Research Institute of Fisheries and Oceanography

Legend: In the spring of 2019, a contest of scientific projects by young scientists was held to encourage them and specialists to be active in implementing the results of fundamental and applied scientific research at fishery institutions and enterprises in order to make fishery more efficient. The winners have an opportunity to present their projects. Support and criticism from the professional community will encourage further creative activity by young scientists, boosting their motivation to develop new and better approaches to resolving the problems faced by the fishing industry today.

Discussion topics:

- 1. New and digital technologies for fundamental and applied scientific research in the fishery sector.
- 2. Search for promising sites and fishing areas, comprehensive studies of the habitat of hydrobionts.
- 3. Improving the methodology for estimating the amount, reserves and total permissible and possible catches of aquatic bioresources.
- 4. Current and future aquaculture and mariculture technologies.
- 5. Ecology and conservation of aquatic bioresource habitats.
- 6. Fisheries management, social and economic aspects of fisheries and fish
- 7. Advanced technologies for extraction and processing of aquatic bioresources.

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- 1. Leonid Arkhipov, Russian Federal Research Institute of Fisheries and commercial fish species in long-term storage";
- 2. Vitaly Barabanov, Russian Federal Research Institute of Fisheries and Oceanography (Volga-Caspian Branch), "Establishing the Rules for recreational fishing and their digitalization as a growth factor for the recreational potential of the Astrakhan Region";
- 3. Elmira Khalmatova, Russian Federal Research Institute of Fisheries and Oceanography (Atlantic Branch), "Lampfish as a promising subject for research in the Central-Eastern Atlantic":
- 4. Viktoria Khorosheltseva, Russian Federal Research Institute of Fisheries and Oceanography (Azov and Black Sea Branch), "Control over the ichthyopathological condition of the aquaculture facilities in the South of Russia is a scientific basis for increasing aquaculture efficiency";
- 5. Dmitry Churin, Russian Federal Research Institute of Fisheries and Oceanography bioproductive zones in the Atlantic sector of the Antarctic":
- 6. Viktoria Shcherbakova, Russian Federal Research Institute of Fisheries and Oceanography (Central Office), "Genetic differentiation of European and Western Siberian sterlet populations";
- 7. Ivan Lyzhov, Russian Federal Research Institute of Fisheries and Oceanography (Polar Branch), "Deep water holothuria (Molpadia borealis) of the Barents Sea as a unique source of biologically active polysaccharides";
- 8. Yevgeny Fadeyev, Russian Federal Research Institute of Fisheries and

Legend: Stable consumption of fish in the world is one way to obtain the protein the human body needs. Lack of commercial fish can be compensated for by aquaculture development. Total world aquaculture production is growing and progressing.

Since 1961, global fish consumption has grown twice as fast as the world's population, proving that the fisheries sector has a critical role to play in achieving the FAO's goal of a world free from hunger and malnutrition. According to the FAO, aquaculture is now present in 202 economies and territories, with 194 countries having experienced rapid production growth in recent years. For two decades now, China has accounted for 89% of global aquaculture production. Aquaculture will continue to contribute to economic growth and development by increasing production of safe, high quality seafood, creating income-generating opportunities and decent working conditions in the industry and related sectors throughout the production chain, including fish processing, marketing and distribution, and increasing domestic and international trade.

The major role played by aquaculture in the development of aquaculture requires the organizers to discuss aquaculture development issues.

Discussion topics:

1. The global aquaculture and mariculture situation: economics, environment, technology, statistics.

Speakers:

- Oceanography (Central Office), "Prospects for using technology for subcooling

- (Atlantic Branch), "Integrated use of remote sensing methods for studies of

- Oceanography (Kamchatka Branch), "Integrated real-time monitoring of the passage of Pacific salmon producers to the Kamchatka River spawning grounds".

09:30-10:45

Pavilion F

Hall F2

Roundtable No. 3A "Unlocking the Potential of Aquaculture in Russia and the World: Management, Resources, Markets"

Organizers:







Moderator:

Ekaterina Tribilustova. Senior Project Manager, Eurofish

- 2. State policy of the Russian Federation and conditions for aquaculture business development.
- 3. Aquaculture development concept for the Eurasian Economic Union countries.
- 4. World practices of public-private partnerships in aquaculture.
- 5. New markets for aquaculture products and services.
- 6. Advanced global and domestic achievements in fisheries.

Speakers:

- 1. Vasily Sokolov, Deputy Head, Federal Agency for Fisheries, "Regional specifics of aquaculture in Russia: negative and positive experience";
- 2. Marcio Castro de Souza (FIAM), Senior Fishery Officer, FAO, "The world aquaculture situation: economics, environment, technology, statistics";
- 3. Altug Atalay, General Director, Directorate General of Fisheries and Aquaculture, Ministry of Food, Agriculture, and Livestock, Turkey, "The practice of publicprivate partnership in aquaculture in Turkey";
- 4. Inna Golfand, Partner, NEO Centre consulting group, "Domestic projects in aquaculture: geography, economics and financing";
- 5. Yuri Kitashin, President, Aguaculture Union, "Applied issues of aguaculture development as a business: the challenges faced by the industry in Russia
- 6. Elena Ponomareva, Doctor of Biological Sciences, Professor, Southern Scientific Centre of the Russian Academy of Sciences, "Scientific support for aquaculture development in Russia".

Pavilion F Hall F2

11:00-12:30

Conference

"Cost of the Fishing Industry: How to Assess the Efficiency of the Business Use of the National Resource?"

Organizers:





Moderator:

Andrey Danilenko, Chairman, Committee on Agro-Industrial Policy, Delovaya Rossiya (Business Russia

Legend: Russia occupies a strong position among the TOP-10 leaders of the world fishing industry by catch of aquatic biological resources. According to foreign experts, Russia has one of the most effective systems of fisheries management and control over the safety of aquatic biological resources. Yet the capitalization of the Russian fishing industry is at an extremely low level. Russia accounts for only 5 % of the world catch, while its share in global exports is even lower - about 4%, and its share in the revenues of the world fish business is less than 1%.

Undercurrent news agency has been compiling a list of the biggest fishing corporations by revenue for several years. The TOP-100 on the world fish market include only one Russian fishing company.

In 2012-2018, the number of mergers and acquisitions in the fishing industry increased significantly, from 25 major deals in 2012 to 59 in 2018. More than half the transactions are cross-border.

Discussion topics:

- 1. What affects the level of fish business capitalization?
- 2. Why is the capitalization of the Russian fish business low?
- 3. Is low capitalization a legal or accounting problem?
- 4. How do banks assess the fish business?
- 5. How does the state affect the capitalization of the fishing industry?

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Speakers:

- 1. Ilya Shestakov, Deputy Minister of Agriculture of the Russian Federation; Director, Federal Agency for Fishery;
- 2. German Zverev, President, All-Russia Association of Fishery Enterprises, Entrepreneurs, and Exporters, "Fish industry in Russia: What don't the statistics see?";
- 3. Yakov Mirkin, Head, International Capital Markets Department, Institute of World Economy and International Relations of the Russian Academy of Sciences (IMEMO), "Capitalization in the fish industry: can it be high?;
- 4. Darya Snitko, Head of Gazprombank Centre for Economic Forecasting, "Fishing industry on the map of the Russian and world economy: what influences business development and how banks see it";
- 5. Stanislav Naumov, President, Russian Public Relations Association, "Reputational capital of the Russian fishing industry as a factor of capitalization";
- 6. Daniil Tsygankov, Director, Centre for Regulatory Impact Assessment of the National Research University Higher School of Economic, "Fisheries regulatory requirements: what to send to the guillotine?";
- 7. Valery Fedorov. General Director, VCIOM, "The future of the Russian fish market: what do young people think?";
- 8. Aleksey Mashchenkov, Deputy General Director for Economics and Finance, Russian Fishery Company "Factors of capitalization of the Russian fishing industry".
- 9. Roman Karmanov, Deputy General Director, Komsomolskaya Pravda Publishing House, "Reputational capital of the industry is more important than money".

Coffee break from 12:30 to 13:00

Pavilion F

Hall F3

13:00-14:30

Roundtable No. 3 "Fisheries: Social Dimension as a Factor for the Development of Territories"

Organizers:





Legend: Fisheries provide direct and indirect employment for at least 120 million people worldwide.

Fisheries are the foundation of urban planning for the country's coastal areas.

Fish processing requires availability of a proper coastal production and social infrastructure helping resolve the problems involved in people's employment and welfare and constituting a powerful factor in development of territories.

Yet fishing with a clearly seasonal nature, such as the salmon fishing season in the Far East, is often complicated by a shortage of manpower, energy and transport infrastructure in the areas where the fish are caught and processed. This makes it impossible fully to ensure social and economic development of a region.

In addition, there are small-scale fisheries and related activities everywhere, as well as commercial aquaculture enterprises providing for the vital needs of millions of people.

Discussion topics:

- 1. Are fish-based single-industry towns capable of developing? How can permanent employment be ensured?
- 2. New solutions for fish processing: energy, construction, transport;
- 3. Shift method or creation of a full social infrastructure in hard-to-reach regions?
- 4. Development of waste-free production to increase employment.

Moderator:

Sergei Mitin,
Senior Vice-Chairman
of the Federation Council
Committee on Agriculture
and Food Policy
and Environmental
Management

Speakers:

- Hiroya Ebina, Mayor of Kushiro, Japan, "The role of fishing in the economic development of Kushiro";
- 2. Ms Berglind Asgeirsdottir, Ambassador of the Republic of Iceland to the Russian Federation, "Effects of the advanced fisheries industry on Iceland's economy";
- 3. Alexey Buglak, President, Russian Pollock Catchers Association, "On certification of social and labour relations and consequences for the Russian fishing industry";
- 4. A.F. Ratashnyuk, Executive Director, Pollock Catchers Association, "Regulation of social and labour relations in fishing";
- 5. Sergey Tarusov, Chairman, Fishing collective farm named after V.I. Lenin, "The specifics of city-forming enterprises in the fishing industry";
- 6. Miron Borgulev, Sustainable Marine Fishery Programme, WWF Russia, "Spawning protection forest belts: balancing fishing and forest management interests."

Coffee break from 14:30 to 15:00

Pavilion F

Hall F2

13:00-14:30

Roundtable No. 4 "Fish Market Economics: Fishing, Processing, Logistics, and Retail"

Organizers:





Moderator:

German Zverev, President, All-Russia Association of Fisheries Enterprises, Entrepreneurs and Exporters **Legend:** The fishing business is considered to be one of the most complicated and high-risk. Success largely depends on factors that are difficult to predict: the state of aquatic bioresources, the weather, fuel costs, etc. As a result, one year might be successful, while another might not. Such uncertainty affects the loading of processing enterprises and the entire supply chain to the consumer, on to which insurance of financial risks is shifted in the form of rising prices for end products.

Shortcomings in port facilities and law enforcement further increase investment risks and hold back the growth of a sustainable fisheries economy. The result is export of fish raw materials and import of finished products, which threatens the country's food security.

The huge distances between the Far Eastern ports and the main consumption centres in the central regions make the problem of transport timing and temperature regimes particularly pressing. Specialized high-speed trains and refrigerated containers with particularly low temperatures are needed.

Will operation of logistics centres near big cities be cost-effective?

Organizing a specialized trade network selling fish products (such as "Ocean" stores) as an alternative to fish departments in hypermarket chains. Fish exchange and e-commerce: are they possible in Russia?

Discussion topics:

- 1. Filling the market: to produce more or to change the focus of supply?
- 2. Protective barriers or creation of conditions at domestic ports?
- 3. Optimizing the supply chain to cut fish product prices.
- 4. Buy, catch, grow: where to get fish for the table in Russia.
- 5. What is the influence of the country's economic situation on the level of fish product consumption by the public?
- 6. Preserve and deliver: What's new in logistics? Will the "fish express" save us?

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Speakers:

- 1. Sergey Stankovski, Managing Director, Renaissance Capital, "How to eliminate the risks of currency fluctuations and growth of ship fuel prices";
- 2. Inna Golfand, Partner, Agro-Industrial Complex Practice, NEO Centre, "Import, export, production: opportunities to reduce imports and increase exports, what projects are of investment interest?";
- 3. Diego Lages, Marel Food Systems, "Industry 4.0. Challenges and solutions";
- 4. Stanislav Dudin, Deputy General Director, Skipasyn Russia, "Real benefits of optimizing modern fishing vessel projects for specific operating conditions";
- 5. Dmitry Maksimenko, Co-Owner and Executive Director, Innosoft (YORSO.com), "Tools for optimizing the value chain to reduce the price of fish products";
- 6. Andrew Papachrysou, Procurement Director, Nomad Foods, "Nomad Foods: fish and the link to sustainable ocean development";
- 7. Mikhail Sinev, President, Association of Refrigerated Rolling Stock Operators (ARRSO), "Product quality as an important component of logistics efficiency";
- 8. Natalya Gracheva, Head of Customer Relations Department, JSC Gazprombank Leasing, "Leasing as an effective tool for financing renewal of the fishing fleet and fish and seafood processing equipment".
- 9. Dmitry Yechkalov, Executive Director, Head of International Business Development, Sberbank Factoring, "International factoring".
- Jonas Tryggvason, General Director, KNARR Russia, "Localization in the Russian Fisheries Industry: Benefits and Prospects. KNARR's experience on the Russian market";

Pavilion E Gala Meeting

Hall E10-E12

Coffee break hall E9 (concert, cocktail party)

Industry workers' awards ceremony

Sea Cadet Ball (concert, cocktail party)

15:00-17:00

Gala meeting on the occasion of Fisherman's Day

* The programme is subject to change

ORGANIZER



FORUM OPERATOR



EXHIBITION OPERATOR



GENERAL PARTNERS









OFFICIAL PARTNER



STRATEGIC PARTNERS











PARTNERS



GENERAL INFORMATION PARTNER



STRATEGIC INFORMATION PARTNERS



























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