

BORD IASCAIGH MHARA
STATEMENT OF STRATEGY

2018-2020

ENABLING SUSTAINABLE GROWTH



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Irish fishing, fish farming and seafood processing are widely recognised as sectors with significant potential for growth. With seafood trade reaching €1 billion for the first time, that potential is beginning to be realised.



Chairman's STATEMENT

I am very pleased to see the strategic re-alignment of BIM's services set out in this Statement of Strategy. The BIM Board and I see this as an exciting transition that will enable the agency to deliver its strategic vision and mission. I have been impressed with the involvement and support of staff in BIM in embracing this change and it is their commitment to the Irish Seafood Industry that will drive this strategy forward.

Irish fishing, fish farming and seafood processing are widely recognised as sectors with significant potential for growth. With seafood trade reaching €1 billion for the first time in 2017, that potential is beginning to be realised. I am acutely aware from my long involvement in rural development and regeneration that the seafood sector provides a vital source of jobs and economic activity for coastal communities and that it has a big role to play in bringing about long term growth for our country.

In implementing this strategy, BIM will make a significant contribution to delivering on the policy objectives of our parent Department of Agriculture, Food and the Marine. In particular, BIM will administer an extensive work programme for the seafood industry under the European Maritime and Fisheries Fund and will work alongside its partner agencies, Bord Bia and the Marine Institute, to deliver on *Food Wise 2025* and on the ambitions set out in the *Harnessing Our Ocean Wealth* plan.

I would like to acknowledge the valuable contribution and support of the Minister and his Department, my colleagues on the Board and the senior leadership team in BIM in developing this exciting strategy that will see the enhanced delivery of relevant services to all of our stakeholders.



Kieran Calnan
Chairman





Chief Executive's INTRODUCTION

This Statement of Strategy sets out how BIM support for the seafood sector will be delivered in new and exciting ways over the next three years and into the future. In doing so, we will be building on BIM's long tradition of assisting the Irish seafood sector which began some sixty-five years ago.

The good news is that seafood is on-trend globally. The world's population continues to grow and seafood is the protein source of choice for the rapidly expanding middle class of consumers in the Asia-Pacific region whilst also remaining a core part of the diet of many people, especially in Africa. The United Nations Food & Agricultural Organisation (FAO) estimate that by 2030, two thirds of the world's middle-income consumers will live in this region. Per capita consumption of seafood has trebled in China alone over the last twenty five years, creating upward pressure on demand.

Closer to home, in the EU there is a seafood trade deficit of approximately €17 billion. EU consumers want to eat more seafood as their appreciation of its nutritional and health qualities grow. This trend is also driven by improved convenience through innovation in product forms and packaging as well as by demographics; as the EU population ages, seafood consumption is increasing.

The resulting surge in demand for seafood is seizing world markets and countries such as Ireland, with the right natural resource base, are well placed to take advantage of these trends if the appropriate actions are taken now.

Notwithstanding that potential, there are constraints bearing upon the industry. Significantly increasing the raw material supply base requires a new approach. This is the case both for the fishing sector and for fish farming. Creating the circumstances where a greater share of the overall catch is landed into Ireland holds promise as a source of extra raw material for our processors. Modest increases in yield from some fisheries are also possible if the right conservation measures are followed.

As set out in the EU communication, the *Strategic Guidelines for the Sustainable Development of EU Aquaculture*, expansion of the aquaculture sector across the EU has been stifled to a considerable



extent by licencing difficulties. There is a need to integrate aquaculture into local communities and the greater coastal zone, to improve the perception and acceptance of aquaculture development. Actions to achieve this outcome are called for in the Government's *National Strategic Plan for the Sustainable Development of Aquaculture* and BIM has incorporated these into this strategy.

In seeking to lead change within the Irish seafood sector, BIM recognises the need to adapt the range of services it offers to the fishing, fish farming and seafood processing sectors, to the Department of Agriculture, Food and the Marine and to its sister agencies. As part of this strategy, BIM will embrace changes to its structures and ways of working.

The window of opportunity created by the European Maritime and Fisheries Fund (EMFF) is finite and the seafood sector, which operates in a freely traded global market, is highly competitive and fast moving. We recognise that a 'business as usual' approach will not suffice as time is short, given the scale of the challenges on the one hand and the opportunity on the other.

Our catching sector must be helped to prepare for the requirements of the landing obligation. Legislation banning the long standing and much criticised practice of discarding unwanted catch - introduced on a phased basis since the 1st January 2015 - will apply to all species subject to catch limits from the 1st January 2019. They must also be supported to deal with the implications of Brexit, which has brought a high degree of uncertainty to the sector and has the potential to completely change the landscape for the men and women involved in the Irish seafood sector.

The Irish aquaculture sector has its share of challenges also. These are set out in the multi-annual *National Strategic Plan for Sustainable Development of Aquaculture*, which is largely being implemented through EMFF funded schemes by BIM. These challenges include the need to streamline and reduce the administrative burden associated with aquaculture licensing and regulation, the need to create greater levels of societal acceptance for the sector and the requirement to develop and adopt new technologies and techniques to improve efficiency, combat adverse environmental events and improve the competitive position of the Irish sector. Actions to assist in coming to terms with these issues are set out in the National Plan and where appropriate they have been incorporated into BIM's 2018 to 2020 Statement of Strategy. BIM

will also continue to provide a range of services to the Department of Agriculture, Food and the Marine (DAFM) designed to assist with the elimination of the aquaculture licensing backlog and the timely processing of future applications.

Similarly, the seafood processing sector must be assisted on its journey to be suppliers of highly differentiated, innovative products that can access the most valuable market segments wherever they are sold around the world. They must have impeccable sustainability credentials, demonstrate they are taking all possible steps to reduce their environmental footprint and verify the attributes of their offering underpinned by world class accreditation.

In 2016, BIM commissioned a report on the Irish Seafood sector called *Focusing the Future*, which was carried out in consultation with Irish industry leaders. It was authored by Mary Shelman, an internationally renowned expert in the agri-food sector, formerly of the prestigious Harvard Business School.

The report observed that the Irish Industry was characterised by a lack of scale, constrained in its raw material supply and undercapitalised. A new strategic approach was proposed, taking account of these industry shortcomings. At the core of that report was a call to move the Irish seafood industry further along the value chain with a renewed focus on value creation and profitability.

This was to be achieved via three main developmental thrusts. Firstly, through generating a much enhanced level of differentiation within the Irish sector's product offering in particular focusing on Ireland as a safe, clean environment in which to catch and produce seafood. Secondly, by supporting a deliberate move into higher value market niches, through more careful customer selection. And thirdly, all of the above to be underpinned by an unrelenting focus on driving out costs, whilst securing enhanced value by better management of the whole supply chain from catching through to the final customer.

Responding to this call to action, BIM has developed a renewed vision for itself through the development of this strategy to support and, where appropriate, lead the industry into a better future.

The availability of significant financial resources from the EMFF that can leverage private investment, the insights of the *Focusing the Future* report for the industry, together with careful

consideration of a number of potentially highly disruptive external factors, such as Brexit and climate change, have all informed, shaped and influenced the development of this strategy for BIM.

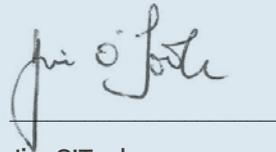
BIM, working closely with the Department of Agriculture, Food and the Marine and our industry partners, is determined to make the best possible use of this unprecedented level of funding so as to assist the sector to make the necessary changes to allow it to compete and win into the future.

As the agency charged with the task of leading the future development of Irish seafood, we believe that we can proceed with confidence basing our plans on the substantive building blocks set out above.

BIM's new strategy, which has a strong emphasis on delivering value-for-money in our services to our stakeholders, aims to concentrate our range of

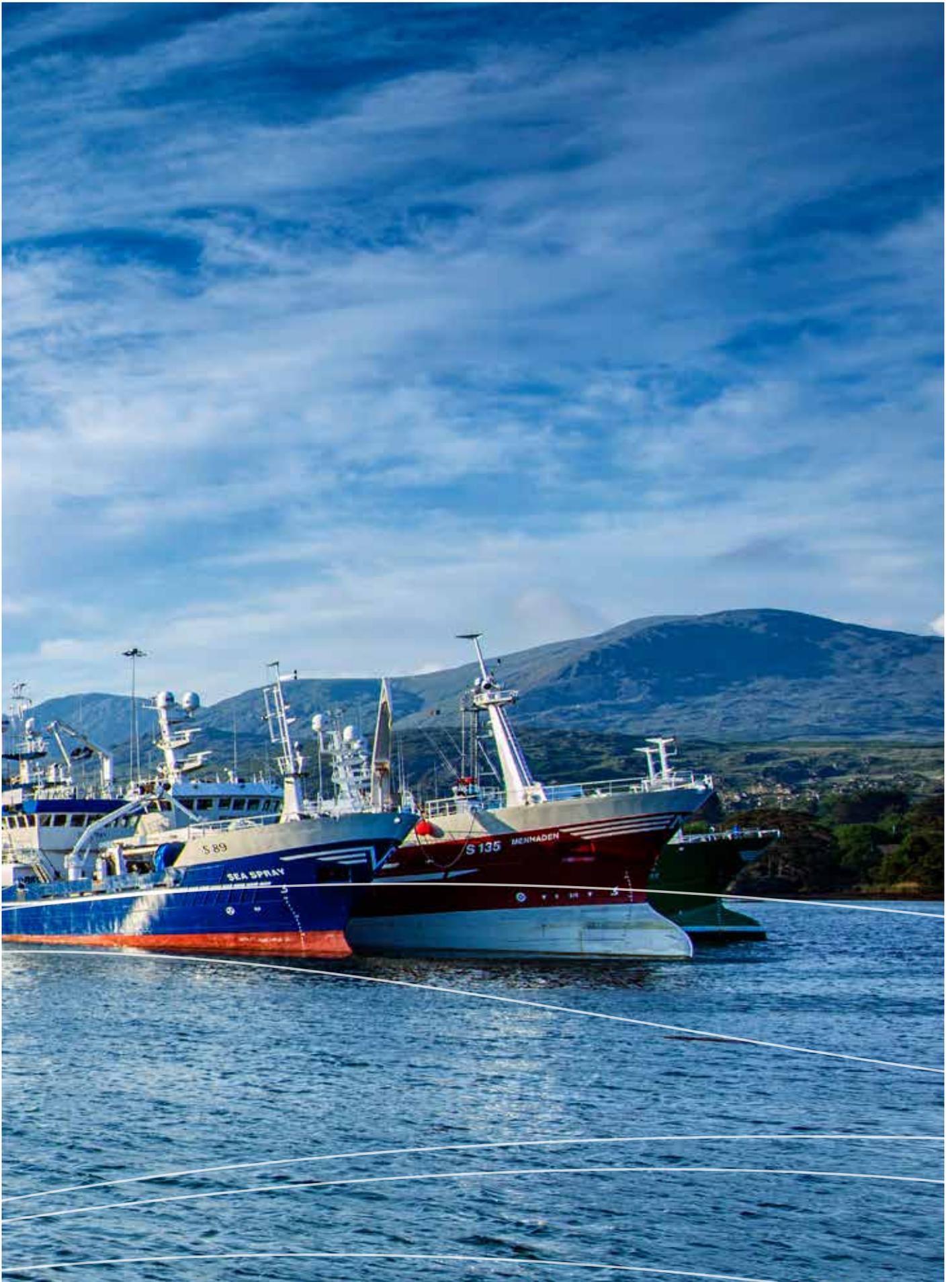
supports on key areas. For clarity, and as a means of explaining what we intend to do, the new BIM service offering is grouped under five strategic headings as per the graphic below.

Ireland has the ambition to position itself as an international leader in the global seafood industry. BIM's strategy is designed to enable industry to channel resources that will deliver optimum results for the sector, the economy and the coastal communities that rely on this industry for revenue and employment.



Jim O'Toole
Chief Executive Officer





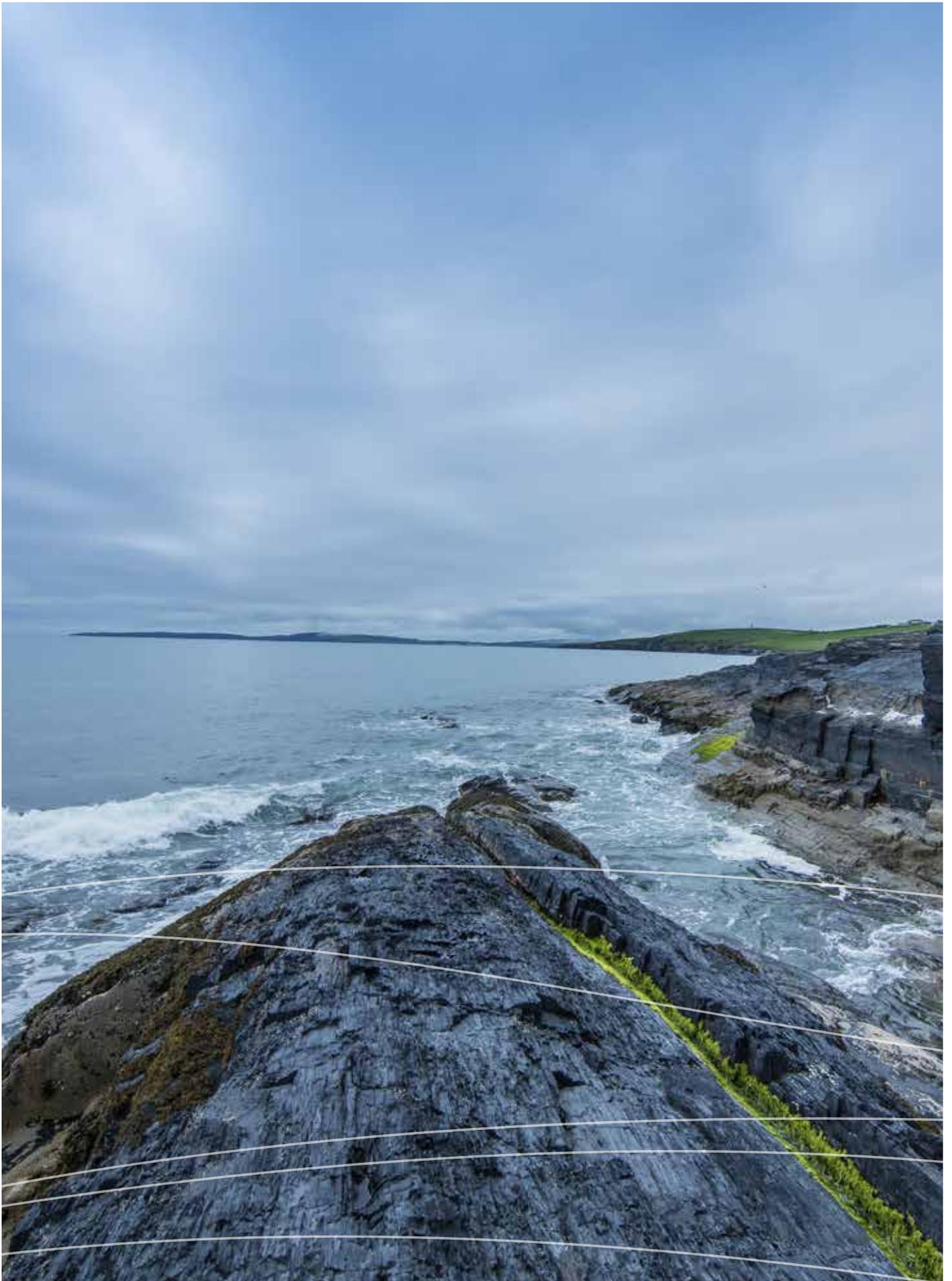
1 MISSION & VISION

OUR MISSION

To support and enable an increase in value creation of a sustainable Irish seafood sector across the supply chain, from catch to consumer

OUR VISION

Leading the Irish Seafood sector through our effective support and deep expertise so that Ireland becomes the international leader in high value differentiated products that satisfy the growing demand for healthy, safe, responsibly and sustainably produced seafood



REALISING OUR VISION

BIM's Vision is a statement of our ambition for the sector and our role within it. To bring the statement to life and as an aid to understanding the thinking behind it more fully, we have identified five key elements of our Vision and set out a more detailed description for each.

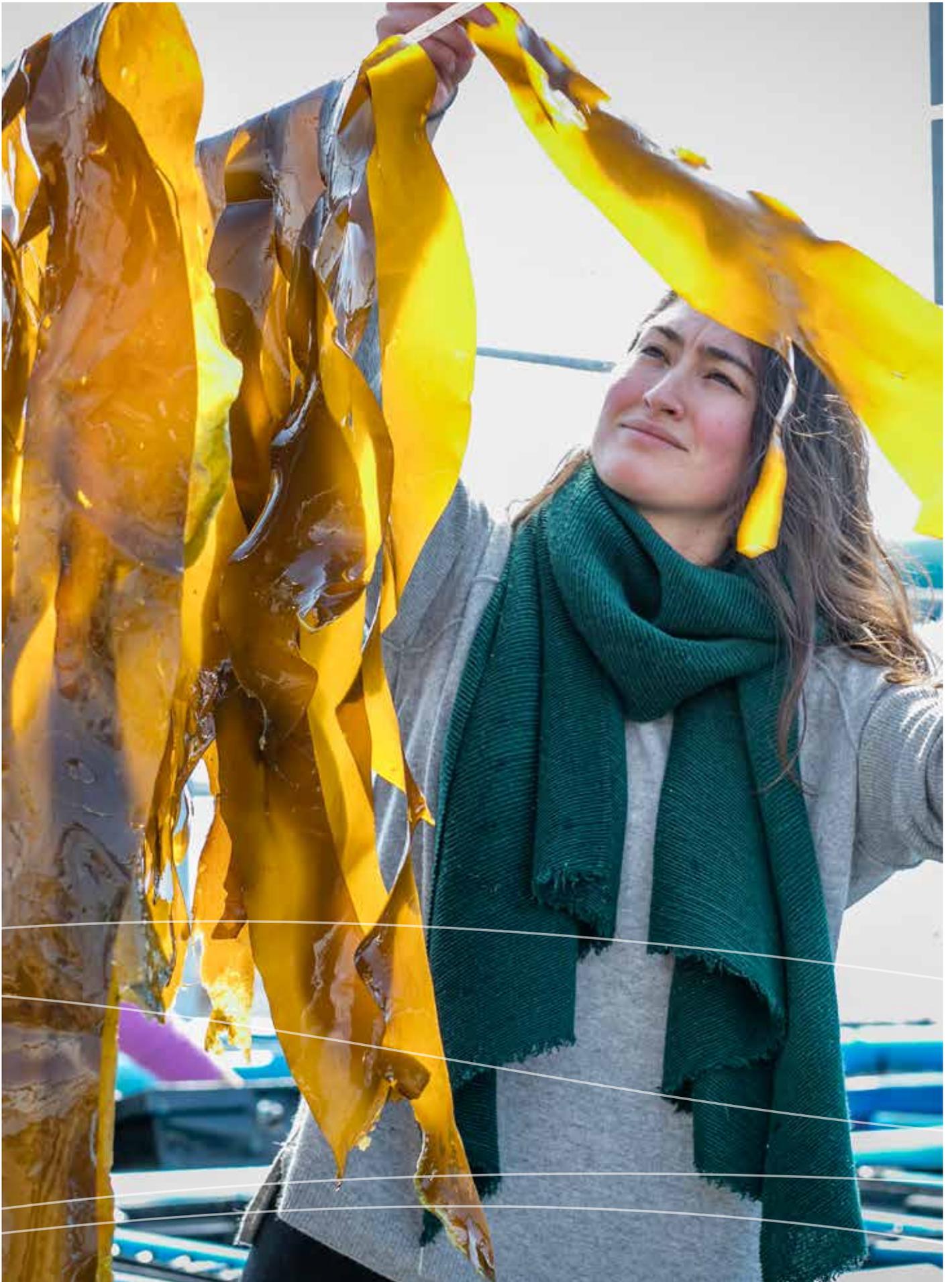
1

DELIVERING SUSTAINABILITY

Irish seafood will be seen as a responsible and sustainable catching, farming, and processing sector, with world class environmental management systems embedded in all its operations.

Strategic action:

BIM has a clear, well understood and leading role in supporting the seafood sector in defining, developing and embedding valued and valuable sustainability programmes.



2

WORLD CLASS EDUCATION & TRAINING

Throughout the Irish seafood sector we will have a highly capable, structured workforce with recognised standards and qualifications that are mapped onto the National Framework of Qualifications, with lifelong career paths.

Strategic action:

BIM has enhanced the attractiveness and viability of careers in the seafood sector by driving the introduction of fully recognised and accredited pathways for lifelong learning and career progression, featuring recognition of prior learning and portable modular qualifications.

3

FOCUS ON PROFITABILITY

Ireland will be regarded as a leader in high-value, high-margin, differentiated seafood.

Strategic actions:

- BIM working with the sector and other national agencies to build effective differentiation strategies for Irish seafood products, allowing the sector to pursue higher value niches in the best markets with a focus on maximizing profits.
- The value of Irish seafood increases through commercially focused, industry-led innovation.

4

SECTOR EXPERTISE

BIM will be recognised and respected as the source for deep, focused and in-demand sectoral expertise and insight, which will provide material guidance to industry in their business planning and decision making.

Strategic actions:

- BIM has built on and expanded their existing core technical and analytical research capabilities to become recognised and respected thought-leaders.
- BIM is highly pro-active in sharing their relevant and sought after expertise with all stakeholders.

5

LEADING THE SECTOR

BIM will be widely acknowledged as the agency leading the drive for sustainable growth in the Irish seafood sector.

Strategic action:

BIM is delivering highly relevant, insight-driven support services to all stakeholders in the Irish seafood sector. This will include our parent Department, our sister agencies and the private sector companies trading in the industry, and the men and women harvesting and farming seafood.



2

STRATEGIC PRIORITIES & ACTIONS

Having set out and clarified what our future vision for the Irish seafood sector looks like, this strategy document now turns to the actions that we will take to turn this vision into a reality.

BIM has defined a clear set of five strategies and related initiatives. These initiatives are the way in which the organisation will deliver on the 'Vision'. In each case, we have set out the strategy, the supporting initiatives, the rationale and the benefits that will accrue.

1

SUSTAINABILITY

Establish and drive a range of effective approaches to differentiate Irish seafood products, based on demonstrating their environmental credentials and provenance.

INITIATIVES

- Set and implement relevant standards across all sectors based on internationally-recognised schemes, including Marine Stewardship Council, Global Seafood Sustainability Initiative, Organic Certification, Fisheries Improvement Plans and BIM's own suite of Assurance Schemes.
- Embrace Origin Green and drive sustainability standards to underpin the Irish seafood sector.
- Actively showcase the actions being taken by the sector on sustainability and build societal support for increased seafood production, especially aquaculture.
- Provide the sector with effective technical programmes that reduce environmental impact and increase competitiveness.

RATIONALE

- There is a growing demand within the seafood marketplace globally to be able to demonstrate responsible and sustainable practices.
- As the focus shifts to concentrate on higher value market segments, more sophisticated consumer expectations will have to be met.
- These initiatives create an opportunity to differentiate Irish seafood in high-margin international markets.

BENEFITS

- BIM will have established environmental sustainability practices centred on creating value.
- Irish seafood products will be better able to differentiate themselves from their international counterparts, to enable them to achieve access to higher margin segments in international markets.
- The Irish seafood sector further builds on Ireland's positive image.

2

SKILLS

Deliver a structured career path through the provision of life long, accredited learning to create a professional, educated talent pool for the sector.

INITIATIVES

- Create a structured, lifelong career path in order to attract and retain key talent in the Irish fishing, aquaculture and seafood processing sector.
- Disseminate knowledge, skills and business leadership using a combination of internal expertise and collaboration with external partners.
- Provide targeted training, access and funding where needed to drive skills development at all levels in the sector.
- Provide business mentoring and leadership to the sector using both BIM experts and access to specialist training.
- Promote best practice regarding safety and working conditions.
- Protect the Irish seafood sector's reputation through training, to deliver high standards of seafood safety management.

RATIONALE

- The long-term viability of the Irish seafood sector relies on attracting and retaining a highly-trained and educated workforce.
- The sector needs to increase its attractiveness to new entrants.
- A structured lifelong career path will attract and retain talent.

BENEFITS

- An investment in training will create an increasingly skilled and more professional workforce that creates value.
- The sector becomes attractive as a career at all levels.
- High levels of seafood safety management are essential to mitigate against risk to our reputation.
- The sector is equipped with the knowledge and skills to take advantage of market opportunities and create value.

3

INNOVATION

Fleets, farms and factories are developing new and smarter ways of doing business.

INITIATIVES

- Embed and promote the widespread use of the methodologies developed specifically for seafood by BIM to drive commercial growth across the sector in the quickest and most efficient way possible.
- Put in place a new BIM client engagement model for the seafood sector that is based on a partnership approach.
- Establish a multi-campus seafood innovation 'Centre of Excellence' to encourage investment in Research and Development, directed by BIM in partnership with the sector, research and third level institutions.
- Make sources of market-led insight available to inform and drive the seafood sector's expansion into new niches in the global market.

RATIONALE

- Create the capacity to innovate and adopt new ways of operating business to enhance the global competitiveness of the Irish seafood sector.
- Encourage and enable Irish seafood companies to act more strategically in their ways of doing business.
- To create extra value at every stage of the supply chain.
- Increase profitability by shifting focus away from being price takers in a commodity market.

BENEFITS

- Innovation will be commercially led with a focus around value creation.
- Market-led insights have a greater chance of yielding commercial success.
- An effective innovation process and mind-set will be embedded across the whole sector.

4

COMPETITIVENESS

BIM to become recognised experts on national, regional and global seafood economic trends and share them with the sector.

INITIATIVES

- Develop deep expertise in global seafood economic data collection, assessment and analysis to provide valuable commercial guidance to the sector.
- Exploit our seafood industry expert position to give effective guidance to the sector as it faces new trends and challenges.
- Develop strategically aligned, expertise in core areas where there is a current gap in the existing body of knowledge and practice.
- Build on our current expertise to elevate BIM's international reputation.
- Build a global network for relevant information gathering and sharing.

RATIONALE

- The seafood sector has unique issues and attributes that require specialist guidance and support in responding to local, national and global trends.
- Create guidance for the sector through data-driven insights.
- Shifting focus from commodity to maximising profitability requires expert support.
- The broader environment in which the sector operates requires a global economic perspective and understanding.

BENEFITS

- BIM offers credible, trusted, relevant, data-driven guidance to the sector in an increasingly complex market environment.
- Increasingly robust data, insights and forecasts will be made available to the sector.
- The reputation of the Irish seafood sector will be enhanced.



5

LEADERSHIP

In collaboration with other agencies, ambitiously champion the seafood sector's development.

INITIATIVES

- Leverage government and sector relationships in the seafood development space, so as to elevate the status of the sector for investment and accelerate growth.
- Align the sector behind an ambitious but realistic growth and profitability agenda.
- Clarify and align national agency collaboration to ensure integrated support for our stakeholders.
- Continue to work closely with Bord Bia to support and drive awareness and recognition of differentiation in Irish seafood.

RATIONALE

- To heighten the awareness of the specific needs of the seafood sector so that the sector can deliver an ambitious growth agenda.
- As the seafood development agency, we are best placed to lead improvements in the level of coordination and the provision of services and support to the seafood sector.

BENEFITS

- Create clarity around the support that is provided to the sector.
- A better integrated offering from the agencies will accelerate growth in the sector.
- By leveraging the status of seafood at a national level, the sector will be seen as attractive and dynamic.

3

DEVELOPING BIM'S OFFERING

BIM must challenge itself to ensure that it has the capacity to deliver this strategy. We have identified developmental actions that are going to play a significant role in its successful implementation.

1

CREATE A NEW ORGANISATION WITH A DESIGN THAT IS OPEN, COLLABORATIVE AND STRONGLY ALIGNED TO ITS CORPORATE STRATEGY

KEY ACTIONS

- Align BIM's structure with its new strategy by revising the organisational design.
- Deliver more effective internal processes and structures.
- Align service offerings more closely with stakeholders' needs.
- Enhance efficient, cross functional working.



2

DELIVER EXCELLENCE IN ENGAGEMENT AND COMMUNICATIONS

KEY ACTIONS

- Implement formal internal and external engagement supported by more effective communication systems.
- Build structured and well managed relationships with all stakeholders.
- Effectively communicate BIM Strategy to our stakeholders.

3

DELIVER EXCELLENT SUPPORT SYSTEMS

KEY ACTIONS

- Create a world class Customer Relationship Management (CRM) environment and supporting processes.
- Streamline and modernise key processes in the administration of services.

4

IGNITE THE PASSION AND AMBITION WITHIN BIM

KEY ACTIONS

- Implement a “super engagement” process to align staff with the ambitions and excitement of the strategy.
- Actively engage staff at all levels in the implementation of the strategy throughout its lifetime.
- Reaffirm the commitment of the organisation to its people.





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