

## BIM EMFAF Work Programme Project Report 2022

<b>BENEFICIARY:</b>	Bord Iascaigh Mhara
<b>PROJECT REFERENCE NUMBER:</b>	22/KGS/DIS-BG010-BR044
<b>NAME OF PROJECT:</b>	<b>Whitefish Strategy Development</b>
<b>IMPLEMENTATION PERIOD:</b>	1st January to 31st December 2022

### Project Scope

The Demersal sector is fragmented (mixed species/catch, lacking scale, coordination, and alignment) along the supply chain, and is not fully aligned to the market dynamics and the role of attributes (quality, trust, transparency, sustainability) which can inhibit competition and has led to a reliance on export commodity spot markets, in other words, a “Push v Pull” mentality. The demersal sector is diverse and encapsulates numerous main species caught: whiting, haddock, hake, monk, megrim and prawns. This project will deliver an agreed and aligned consensus with the industry and identify priorities and actions through a strategy for increasing value across the supply chain for the Demersal sector.

BIM wishes to use this sector wide approach to build trust framing a joint Demersal strategy with strong sectoral engagement and alignment on potential solution options to deliver client focussed outcomes through encouraging leadership groups to emerge from within the sector.

The impact of Brexit has challenged the traditional supply chain model, for example the catching/first point of sale were very exposed to risks in dealing with UK customers, and ability for UK (Scotland) to process and to sell onwards has led to questioning of the exposure to commodity markets and the fragile nature of this supply chain. The need to move up the value chain and the potential that the BAR funding offers our processing sector to deliver the capability to process the Irish catch is going to be important to:

- help to transform our catch and ensure that greater alignment throughout the supply chain.
- enable greater value to be achieved throughout the sector.

As a follow-on from the work completed in 2021, project engagement highlighted the need for more widespread sectoral engagement than originally envisaged to ensure the project is firmly grounded with an in depth understanding of the Demersal supply chain.

From the stakeholder discussions there is a strong willingness to engage with the process from the sector and as many of the challenges emerging are systemic, it is the consensus that issues need to be progressed with a number of pilot projects.

It was important that BIM uses this engagement process to validate the issues and challenges with a clear review of the service and support offering.

Quality and sustainability initiatives:

- Industry groups work together to share best practice and tackle sector



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- Data - market gathering projects to facilitate market led development
- Supply chain and logistical challenges and opportunities
- Integration and business model development solutions to create efficiencies

Seeking alignment on BIM work programmes to facilitate and compliment this work was identified as a core element in delivering efficiencies from an internal resourcing perspective.

## Objectives

- To define engagement strategy with the sector.
- Validate and prioritise barriers or issues impacting value creation, with industry stakeholders.
- Assessment of future supply chain potential and a view of future trends.
- Build a BIM strategy and implementation plan for the sector in alignment with industry objectives and priorities to progress value add opportunity by stakeholder and species.
- Implementation plan is defined with relevant pilot projects to address these issues agreed with stakeholders.

## Outcomes

After completing the RFT procurement process, BIM engaged the services of MCCP to complete the strategy. The process was unique in that it sought the opinions of key internal stakeholders and used these sessions to develop a set of hypotheses that were strongly tested with the sector, over a number of joint BIM & MCCP engagements. The project involved the continuation of the work which commenced in 2021 and with the completion of the Whitefish demersal strategy through a process of:

- Two rounds of both online and face to face engagements with key supply chain stakeholders.
- Evaluation of data and reports to develop an agreed value chain model by species and clarification of data gaps.
- Facilitation of internal alignment sessions with key stakeholders to validate sector feedback and agree cross unit potential areas of alignment.
- Review engagements over the period from commencement and preparation of strategy document for review and adjust throughout the year to completion.
- Final review of outputs and areas for progression with key supply chain stakeholders to secure sector confirmation of emerging themes and suggested solutions to facilitate implementation plan.
- Final Strategy document with Implementation Plan.

Seven key enablers and barriers emerged with a crucial need for a market facing mindset with potential for value to be created throughout the supply chain. The understanding that we need to do “more with less” and maximise the resources that exist in the sector to secure its future and the need to work together to continue to develop collaborative solutions where possible.

Given that the issues identified were classed as systemic, the process going forward will include the formation of pilot projects to prove concepts and encourage collaboration.

This unique level of engagement was identified as crucial and needs to be continued as part of the implementation through the period 2023 to 2026.



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## Summary of Project Spend

Summary of Spend	
Total Approved Costs	€145,000
Total Eligible Expenditure	€138,806
EMFAF Eligible Expenditure	€69,403
Exchequer	€69,403

Report by: Vinent Ryan

Date: February 2023



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