

The background of the entire page is a photograph of fishing gear on a beach. It features a tangled net of light blue mesh, several pieces of thick brown rope, and two reddish-brown floats. The scene is captured in a soft, slightly desaturated style, giving it a calm, maritime feel.

2012-2015 Delivery Report

SEAFISH
the authority on seafood



Delivering for our industry

Our 2012-15 Corporate Plan marked a real turning point in the Seafish story. A long and difficult legal challenge that seemed to question our very validity was followed in quick succession by an all-industry review that sought to clarify the view of our stakeholders. While both court case and review returned an emphatically positive affirmation of our organisation, we were left in urgent need of a fresh start. This Corporate Plan was just that.

The Plan heralded a new way of working and brought industry stakeholders into the heart of Seafish operations through the establishment of three Sector Panels covering all areas of the industry from catch to plate.

The Sector Panels have been a key part of our delivery over the last few years. From a Seafish perspective, the Panels have been hugely helpful, not only advising on the areas of work to be covered but acting as a regular sounding board. Through twice yearly meetings, Panel members have had the opportunity to assess our

performance, whilst our staff have been able to keep close to their industry sponsors and hear the views of the different sectors. I would like to take this opportunity to thank all the members of our Panels for the time and enthusiasm they have put into the process of supporting Seafish.

Over the life of this Plan, our operations were delivered through seven workstreams, which each set out how they would contribute to achieving our High Level Objectives to protect, promote and inform. The workstreams set out not just their objectives and outputs, but the real world outcomes they hoped to evidence. In pages 2 to 47, we look at this work in detail and show how and where we made a difference.

There is much to be pleased of in this document and I present it back to our stakeholders with an enormous sense of pride. Yes, there are areas where we did not perform as well as we hoped and, of course, much learning to take forward to our new CP1518.

It should be noted that this Report does not attempt to assess the financial performance that supported delivery; that detail has been provided year by year in our Annual Reports and will conclude with a final Annual report for this Corporate Plan.

As our CP came to an end we commissioned a review of the panel process, surveying all members to ascertain their thoughts. This work can be found on pages 48-57 of this document and forms an important part of any assessment of our performance during this period.



Dr Paul Williams
Chief Executive

Reputation

KPI: Seafish will define four key messages per year and track opportunities to see, and proportion of positive messages. Monitored every six months.

Seafish defined and successfully delivered at least four key messages each year, including an industry response to 'Hugh's Fish Fight', Fish & Chips, Fishermen's Safety (Sea You Home Safe), Healthy Eating, Marine Protected Areas and The Humber Seafood Summit.

Over the life of the Plan, an average positive sentiment score of 90% for Seafish and the industry on tracked media.



Case Study: Sea You Home Safe

Fishing is the most dangerous peacetime occupation in the UK and 94 commercial fishermen lost their lives in the past 10 years. Working with our Safety colleagues, we devised and delivered an integrated campaign to raise awareness of Personal Flotation Devices (PFDs).

Our award-winning work helped to:

- Prompt behavioural change that increased the use of PFDs amongst commercial fishermen
- Increase awareness of difficulties associated with an unrecovered body and the impact on family
- Position Seafish as the authority for the industry - championing better practice

Strategy

- Driven by insight secured through a survey of 100 commercial fishermen in the UK
- A multichannel communication approach, using emotive content in the form of real-life stories to highlight the impact on grieving families
- Key messages developed for use across all channels aimed at fishermen and their families

Results

- 94 pieces of coverage, with 95% of the articles positive or balanced
- 98% included a brand check for Seafish and 100% included at least one message
- Since the campaign launched, 1266 fishermen have contacted Seafish to register for a free PFD
- The free PFD has already saved one life. Sam Cully, 35 year old fisherman from Northern Ireland, who said "If I hadn't been wearing the personal flotation device provided by Seafish and The Fishermen's Mission, I wouldn't be here today"

Awards

Seafish won the following industry awards for the Sea You Home Safe campaign:

- PRCA Dare Awards - Campaign Challenges: Winner
- CIPR Pride Awards - Best use of media relations: Gold
- PR Moments - Best not-for-profit campaign: Winner



Key achievements

- The Seafish YouTube channel reached over one million views in November 2014 which represents 3.4 million estimated minutes watched (56,315 hours). 95% of the views came after the recent re-launch of the YouTube Channel on 1 January 2013
- First phase of the Sea You Home Safe campaign generated over 110 million opportunities to see online with an estimated value of £474 million to date
- The Seafish website is up from an average of 10,160 visitors per month in the year preceding the Corporate Plan to an average of 14,366 visitors per month, an increase of 41.2%
- Analysis of the traditional media coverage generated by Seafish shows an average annual reach of 43.64 million people, with an advertising value equivalent of £983,000, excluding the National Fish & Chip Awards
- The sentiment of that media coverage averages in 90%+ for positive/balanced for both Seafish and industry
- Seafish results for the National Fish & Chip Awards improved year on year over the course of the Corporate Plan to the point where in 2014-15 we delivered:
 - 1,027 pieces of editorial coverage
 - 99% positive tone of voice
 - 71% of coverage mentioned Seafish
 - Print reach: 38.4 million
 - Online reach: 1.5 billion
 - Broadcast reach: 111 million
 - Social reach: 5.4 million
- Seafish has won the following awards for its Communications activities between September 2012 and February 2015:
 - CIPR Pride Awards Scotland 2014 Gold Award - Best Use of Media Relations (See You Home Safe)
 - CIPR Pride Awards Scotland 2014 Silver Award - Outstanding In-house Public Relations Team
 - CIOIC Awards 2014 Highly Commended for The Business of Fishing (Best Stakeholder Film)
 - PRCA Dare Awards Scotland 2014 Winner with Sea You Home Safe (Campaign Challenges)
 - CIPR Pride Awards Scotland 2013 Silver Award for The Fish Fight (Corporate and Business Communications Campaign)
 - PR Moments 2015 – Best Not for Profit Campaign of the Year (Sea You Home Safe)



“Our industry has been the victim of some very bad press and often the information quoted is wrong or used out of context, so to see some true facts and support from Seafish is very much appreciated.”

Elizabeth Stevenson, Director, W Stevenson & Sons Ltd

Reputation

Objectives	Outputs	Outcomes
<p>Improve the quantity and quality of positive media sentiment towards the seafood industry</p> <p><i>90%+ for positive/balanced coverage. Steady increase from 273 to 438 pieces of coverage every six month</i></p>	<p>Tracking of key Seafish messages in media ensuring 70% positive sentiment in coverage achieved</p> <p><i>90%+ for positive/balanced coverage</i></p>	<p>Increased positive sentiment in media coverage of +24% (60% in total)</p> <p><i>90%+ for positive/balanced coverage</i></p>
<p>Refute where applicable any negative messages about the UK seafood industry</p> <p><i>Seafish tackled a number of different issues on behalf of industry, winning awards for its campaign around Hugh's Fish Fight</i></p>	<p>Achieving an audience reach of c. 30 million annually with key Seafish messages</p> <p><i>Traditional media coverage generated by Seafish shows an average annual reach of 43.64 million people</i></p>	<p>Online tools deliver greater access to information</p> <p><i>All channels in more positive position than at the start of the programme</i></p>
<p>Work with media, industry and government to maximise all opportunities to demystify the UK seafood industry</p> <p><i>Increased media coverage and reach shows our messages on key topics are far more visible than before</i></p>	<p>Seafish.org + 30% of unique visitors per month by 2015</p> <p><i>The Seafish website is up from an average of 10,160 visitors pm in the year preceding the Corporate Plan to an average of 14,366 visitors pm, giving an increase of 41.2%</i></p>	<p>Stakeholder benchmarking shows greater understanding of an engagement with Seafish and industry</p> <p><i>New benchmark shows 65% satisfaction with Seafish across the organisation with KPIs now in place to improve this score</i></p>
<p>Improve standards in the industry to reduce reputation risk</p> <p><i>Media training delivered across the UK and response groups convened when key issues arose. Proactive films on topics around sustainability, MPAs, Cod and RFS produced and circulated via social media channels</i></p>	<p>Twitter: Seafish + 200% increase by 2015</p> <p><i>Seafish has moved from 1,150 followers to 6,566 in the period, giving an increase of over 570%</i></p>	<p>Industry events deliver improved engagement with key stakeholders measured by participant survey</p> <p><i>A calendar of industry events was delivered and 11% of stakeholders surveyed receiving communications via Seafish events</i></p>
<p>Improve on-line engagement with key audiences</p> <p><i>New channels have been opened up in social media and the website revamped bringing in new audiences. YouTube channel reached over 1 million views in this period</i></p>	<p>YouTube: + 75% increase by 2015</p> <p><i>Reached over 1 million views in November 2014. 95% of this audience has come since a re-launch of the channel in January 2013</i></p>	

Objectives	Outputs	Outcomes
	Seafish with key audiences. Improved e-newsletters with rates of 45-50% opening <i>1,793 currently subscribe to the monthly Seafish e-newsletter with an opening rate of around 25% on average</i>	
	A UK wide events program delivering B2B and stakeholder engagement <i>Completed – see critical tasks</i>	

Progress against critical tasks:

Critical task from CP	Progress
Define Seafish key messages	Completed Fish & Chips, Fishermen's Safety (Sea You Home Safe), Healthy Eating, Marine Protected Areas and The Humber Seafood Summit featured as key highlighted messages across our media coverage in this period
Ensure Seafish Execs meet with 20 key national, local and trade journalists	Completed Seafish has expanded its contacts database significantly over this time. Meetings, phone briefings, and invites to events have ensured Seafish is ahead of target over the period and this is in part reflected by the positive media coverage generated
Improve website usability, content and search functionality	Completed Comprehensive user testing led to an updated website with a clear hierarchy of information being launched in September 2013. Since then infographics, a media centre and clearer links to RASS, RFS and FITD websites have been added with updated user testing being conducted in March 2015 to give us a clear path for future development. In 2014 the Content Management System was updated to further improve functionality

Progress against critical tasks:

Critical task from CP	Progress
Recruit spokespeople both internal and external, for key issue areas and provide media training	<p>Completed</p> <p>Seafish has media trained all appropriate internal staff members and conducted many external sessions for industry. A Seafish e-media academy launched in March 2015 for industry use where skills can be developed further and key messages around specific topics can be shared</p>
Development of the protocols, processes, positioning messages and engagement plans to allow experts to develop enhanced relationships with the media	<p>Completed</p> <p>All protocols have been in place since 2012 and are kept under review, leading to a speeded up process of engagement with the media. The e-media academy (mentioned above) will help embed these further</p>
External communications plans executed around Seafish launch	<p>Completed</p> <p>Launch was affected by a delay in sign-off from the four Fisheries Administrations but it was executed in both traditional and social media channels as well as internally to staff members</p>
Delivery of Seafish e-news to key stakeholders including Defra and Scottish Government	<p>Completed</p> <p>1,793 currently subscribe the monthly Seafish e-newsletter</p>
Creation of annual industry events schedule	<p>Completed</p> <p>Seafish attended the Dorset Seafood Festival, Skipper Expos x 2, Fishcraft, Fryers Roadshows, Craft Guild of Chefs, Young Seafood Chef of the Year Awards as well as creating and hosting the Humber Seafood Summit, National Fish & Chip Awards and Data Roadshows annually. Additional events have included involvement at The Catey's, Brussels Seafood Expo, Supermeat and Fish Awards as well as preparing to deliver the World Seafood Congress in 2015</p>
Coherent use of social media channels with appropriate guidance to staff	<p>Completed</p> <p>Seafish has expanded its social media presence significantly through YouTube and Twitter with several staff members now actively engaged on Twitter, in particular our regional teams</p>

Progress against critical tasks:

Reputation

Critical task from CP	Progress
Clear and concise communications calendar which identifies opportunities for proactive media relations activity	<p>Completed</p> <p>A media calendar is kept fully up-to-date by our Communications team and opportunities are shared with the FITD team who keep a similar opportunities calendar</p>
Schedule of meetings in place with key stakeholders and delivered	<p>Completed</p> <p>Seafish as a whole maintains regular contact with key stakeholders, over the course of the Corporate Plan this has become less of a centralised Communications function and more of an organisational wide responsibility</p>
Development of online tools for Seafish website that enhance user experience	<p>Completed</p> <p>Seafish has developed interactive elements to the website, including the Guide to Seafood Standards, links in to the RASS tool, infographics and a media centre that hosts video and other content. Other sections of the website now host video too including the RFS section</p>
Development of online tools for Seafish website that enhance user experience	<p>Completed</p> <p>Seafish has developed interactive elements to its site including the Guide to Seafood Standards, links in to the RASS tool, infographics and a media centre that hosts video and other content. Other sections of the website now host video too including the RFS section</p>

Consumption

KPI: Increased awareness in target market for Fish is the Dish. Monitored quarterly.

The Fish is the Dish website continues to grow from strength to strength, in the last year – the best yet – it has received over half a million users looking at over 1.5 million pages.

Digital channels Facebook, Twitter, Instagram and Pinterest reached over 244 million consumers, showing Fish is the Dish reaching out to its biggest audience yet.



Case Study: Omega 3 (Feed Your Mind/Superfishoil)

The Russian sanctions on European food imports, introduced in August 2014, carried a potentially negative impact for the UK fishing industry, particularly for commercial mackerel fishermen who typically export £17million worth of produce to Russia annually.

Responding to the sanctions, Seafish devised a UK consumer fish consumption campaign to increase the domestic market for the species affected.

The campaign objectives included:

- Encourage UK consumers to try a greater variety of fish species more often.
- Drive traffic to the Seafish consumer facing website – Fish is the Dish (FITD).
- Engage the target audience through a combination of owned media (FITD social media pages and website) and third party platforms.
- Promote FITD as a source of inspiration and knowledge on seafood.

Strategy

The campaign strategy was driven through research and insight, identifying mackerel as a fantastic source of vitamins, minerals and long-chain Omega-3 fatty acids.

Stage one of our campaign focused on how Omega-3 can boost brainpower, through the strapline 'Feed Your Mind'.

Stage two was driven by research conducted during Feed Your Mind that reported 73% of adults in the UK didn't know how much fish they should eat each week to maintain good health.

Results & evaluation

The campaign generated 101 pieces of media coverage including nine national features and 43 pieces of digital engagement over the six months from October 2014. The campaign reached a total audience of 119.3million. Digital engagement had a combined reach of 1,185,470 and total social impressions from owned and earned media hit 31.7m.

- Unique visitors to the FITD site improved by 290% and click through rate increased by 316%.
- The FITD Facebook page traffic rose 117% and visitors stayed on the site for longer, increasing the average session by 15%.
- 2,744 new Facebook 'Likes' were gained, like-for-like rise of 161% on the same period in 2014.
- Twitter gained 830 new followers, a rise of 155%.
- Our YouTube films, 'World is your Oyster' and #Superfishoil racked up over 200 and 73,144 views respectively.

The Campaign won the PRCA Dare Award for Digital and Social Strategy 2015.



Key achievements

- Education packs have been distributed to around 8,000 primary schools across Scotland, Wales, Northern Ireland and England
- Key market research undertaken into the role of seafood within Foodservice and School menus (data roadshow taking place in March 2015 to present this)
- The first phase of the Omega 3 - Feed Your Mind campaign (launched in October 2014) generated the following uplift;
 - Feed your Mind placed recipes online and in print publications giving an overall campaign reach of 32.7 million, providing coverage equivalent to an advertising spend of £133K
 - Bespoke content on omega-3 and targeting of Marketing and Communications efforts resulted in a surge of Fish is the Dish web traffic, showing unique visitors were up by 9.42%
 - Page views on the Fish is the Dish website were up 15.88% and visitors were staying on the site for longer, increasing the average session by 14.5% to 53 seconds. This increase in length of stay evidences that targeting increases general awareness and fosters an appetite to learn
- In terms of social media, the campaign gained over 24 million impressions with Facebook performance up by 291% and Twitter up by 54%, and innovative health-based content really capturing the imagination of consumers
- Fish is the Dish digital channels over the course of October also gained nearly 3,000 new consumer contacts through their Facebook, Twitter and email subscribers, significantly enhancing our digital first communications
- Digital first communications also included the use of bloggers, vloggers and Jamie's Food Tube Channel, which provided additional support to the campaign, amplifying our messaging and providing endorsement through peer marketing
- Healthy Happy Hearts campaign 2013, working with experts Dr Jane M McKenzie, Queen Margaret University, and Professor Gordon Bell, Stirling University. Key elements included testing for Omega3 v Omega 6, with key media messages on 2-a-week, foodservice, cooking ease and fish as food.
- Fish is the Dish working with The University of Stirling Undertook blood analysis of over 400 consumers to find their level of omega-3 v omega-6. Over 300 of these were undertaken through a partnership with Waitrose when the offer was publicised in the Waitrose Weekend newspaper in January 2015
- Fish is the Dish has made significant impact in engaging the consumer audience online, working with high profile consumer brands including Hunters, Mackies, YoSushi, and introducing a targeted conversational calendar with health, tips and recipe information and competitions. From a starting point of zero our current engagement figures stand at:
 - Facebook: 28,305 likes
 - Twitter: 15,700 followers
 - Pinterest: 13,563 followers
 - Instagram: 182 followers
 - YouTube: 58 subscribers
 - Fish is the Dish email database: 14,000



The Fish is the Dish website is a great recipe resource. I often pay it a visit to get inspiration and there's always something tasty looking on their social media accounts.



Claire Jessiman, Food Writer.

Consumption

Objectives	Outputs	Outcomes
<p>Keep seafood salient when families are planning their menus</p> <p><i>A range of activities under Fish is the Dish has helped achieve this. See critical tasks</i></p>	<p>Online marketing campaign reminding mums how easy seafood is to add to the diet</p> <p><i>Online engagement through FITD delivered positive results - see critical tasks</i></p>	<p>Increased (+20%) salience of seafood in target market as a key part of a healthy diet</p> <p><i>The awareness level of FITD has grown by 140% in just over two years. The net awareness figure for FITD in December 2012 was 5% this more than doubled to 12% of GB adults in March 2015. Looking at the target market of mothers with children, FITD's awareness is even stronger</i></p>
<p>Educate target audiences on the health benefits of regular seafood consumption</p> <p><i>Regular and ongoing health messaging through the FITD channels. Our Feed Your Mind campaign reached of 32.7m people, providing coverage equivalent to an advertising spend of £133K</i></p>	<p>Campaign on health benefits of seafood</p> <p><i>Feed Your Mind - Omega 3 has led on this with positive results</i></p>	<p>Better understanding of the health benefits of regular seafood consumption in the target population by 2015</p> <p><i>Health understanding with consumers saw strong growth in their understanding of some key benefits including: brain function uplift 18.9%; blood pressure uplift 19%; vision uplift 35.7%</i></p> <p><i>Our health messaging will be a planned part of our continuing promote consumption work</i></p>
<p>Maximise the National Fish & Chip awards and develop a Seafood Restaurant Award programme</p> <p><i>The NF&CA has shown a 140% increase in media coverage over the last 24 months of this Plan; Restaurant of the Year competition was launched in January 2015</i></p>	<p>1,000 entries to our National Fish & Chip Awards delivered at zero cost to levy through sponsorship programmes</p> <p><i>Award entries achieved and investment in awards has delivered a reach of 54,292 stakeholders for every £1 spent</i></p>	

Objectives	Outputs	Outcomes
<p>Ensure that children aged under 10 have the opportunity to learn about seafood and its associated health benefits</p> <p><i>Over 8,000 education packs distributed to primary Schools across the UK and teachers resources placed online via the FishistheDish website</i></p> <p><i>Additional activities included the distribution of 60,000 'weaning' recipe books</i></p>	<p>Develop a range of educational resources for teachers</p> <p><i>Over 8,000 education packs distributed to Primary Schools across the UK and teachers resources placed online via the FITD website</i></p>	<p>Increased (15%) mums of primary school children will put seafood on their family menu</p> <p><i>In March 2015 71% of mothers would like their households to eat more seafood</i></p>
<p>Provide information and practical support for foodservice businesses to improve the quality and range of seafood products they make available to consumers</p> <p><i>Seafood Guide redeveloped and made available to food service organisations. Sponsorship of Craft Guild of Chefs and awards such as Supermeat and Fish and the Cateys has supplemented this work. Seafish website updated with a range of tools for foodservice sector</i></p>	<p>Annual seafood challenge for chefs and young/trainee chefs</p> <p><i>Young Seafood Chef of the Year supported annually</i></p>	<p>More primary school children (+15%) will have an increased knowledge about the range of seafood available and its associated health benefits</p> <p><i>Research conducted in December 2013 and re-run in March 2015 shows on average there has been little impact in this area. Recall on species varied with some gains in recall and some losses. Overall only 14% of children couldn't name any fish compared to 15% two years earlier. Pupils who stated that fish was good for them dropped from 69% to 68%</i></p>
	<p>Provision of a range of seafood species to 12 catering colleges</p> <p><i>Not delivered; instead a pilot training programme with 50 catering colleges via Billingsgate Seafood Training School has been started</i></p>	
	<p>Inaugural Restaurant of the Year competition in 2013/14</p> <p><i>Launched in January 2015</i></p>	

Progress against critical tasks:

Critical task from CP	Progress
<p>Extend and develop 'Fish is the Dish' pilot scheme</p>	<p>Completed</p> <p>Fish is the Dish has become the mainstream consumer brand for Seafish and now engages with thousands of consumers per month via its social media channels and it has also reached over 50,000 unique visitors on its website on several occasions. It has fronted several promotional media campaigns on health including Omega 3 and Vitamin D campaigns</p> <p>The website was optimised for mobile traffic to capitalise on the prime audiences of FITD</p> <p>Content development has been key for driving traffic and improving the return on investment for FITD:</p> <ul style="list-style-type: none"> • 250 (created from scratch) recipes • 50 recipes have been nutritionally analysed • Nutritionally based fact sheets covering a range of topics including fish for sport, fish for omega-3, fish for new mums • 28 day and 6 week meal plans that has been nutritional based • Fish Guide detailing species information and nutritional content • Fish finder for consumers locate their nearest monger listing over 500 mongers • Promotional packs for fishmongers and foodservice booklets widely distributed • Lexicon for seafood has been developed which plots 58 species against flavour and texture • Cookbook has been created and over 500,000 copies have been distributed • The Seafish Weaning Guide has been created and 60,000 copies have been distributed, the majority of these to new mums through Tesco Pharmacies

Progress against critical tasks:

Consumption

Critical task from CP	Progress
Online delivery of a range of seafood-specific classroom resources for all curriculums and age groups	<p>Completed</p> <p>Curriculum-friendly education packs have been distributed to every primary school in Wales, Northern Ireland and Scotland and to over 2,000 schools in England. A pilot scheme with Billingsgate Training School is in place to reach other segments of the school population</p> <p>Our work with the British Nutrition Foundation has helped provide expert support for teachers. Through this partnership, fish-based educational resources have been made available on the 'Food - a fact of life' website, with over 18,000 visits to recipe resources</p>
Provide seafood species to 12 catering colleges to ensure that chefs can develop and practise appropriate knife skills and are familiar with preparing seafood	<p>Incomplete</p> <p>Now being delivered through an ambassador programme with Billingsgate Seafood Training School</p>
National Fish & Chip Awards	<p>Completed</p> <p>Successfully delivered each year with standards improving and media reach doubling between 2013 and 2014. Media training is being conducted with all this years finalists in the Independent Take-Away category</p>
Review and evaluation of work programs and revise with industry expert group	<p>Completed</p> <p>Panels regularly review the work of this work stream</p>
Develop a national seafood restaurant competition	<p>Completed</p> <p>The Seafish Seafood Restaurant of the Year Award was launched in January 2015 in association The Caterer magazine with the finals taking place in July 2015</p>

Regulation

KPI: Survey shows that Seafish provides an informed source of advice on regulation issues. Monitored every six months.

Our impact was measured monthly by the number of visitors to our advice pages on the Seafish website. The target of 1500 hits per month was achieved for the majority of months; a dip in the third quarter of 2014 resulted in an improved communication plan which improved web traffic to above its previous level.

Throughout the life of the Plan the regular testimonials received confirmed our value to industry.



Case Study: Food information to the Consumer

The new Food information to the Consumer regulations were proposed in January 2008, with a process of consultation and negotiation between the European Council and the Parliament continuing until agreement was reached in November 2011; the new Regulation 1169/2011 came into force just over a year later in December 2012.

A three-year transition period was agreed to allow industry to make labelling changes in the normal business cycle which meant the regulation did not become effective until December 2014.

Throughout this period, Seafish played an active role to ensure the interpretation of the text would apply the Regulation in a proportionate way.

Seafish were active with UK trade bodies, commenting on amendments to the Regulation during the final negotiations and compromises before agreement in 2011; this is a fast-paced period and responses were often needed within 24 hours.

During this time similar negotiations were going on within the EU on the new Common Organisation of Markets Regulation, which added to existing requirements on the consumer labelling of fish. Initial drafts of this Regulation appeared to be in conflict with the requirements in the Food Information for Consumers (FIC). It also required detail which was not possible or was difficult to supply, such as date of catch or date of landing. Seafish worked with UK and EU trade bodies and Defra to align the regulations and remove the impractical requirements. The final stages of negotiation and agreement were in late November 2013 with the regulation coming into force in December 2014, to coincide with the FIC.

With a much shorter one year transition period for compliance, seafood businesses had little time to deal with issues around interpretation and develop new labelling and Seafish liaised with Defra and industry on the interpretation.

As well as inputting to Defra guidance, Seafish produced its own guidance for both of these regulations focussing on seafood issues, as well as a guide to the new requirement for allergen labelling on food sold loose. We also held seminars around the UK to inform industry of the changes and dealt directly with numerous enquiries from industry.

The negotiations on interpretation continue: assisted by industry, Seafish has commented on draft guidance from the Commission and prepared papers to support Defra in its challenge.

Throughout this process we keep industry informed of progress with negotiations through newsletter, web alerts and tweets.



We would like it on record that your input and support has been invaluable in addressing the extremely complex and large task we have faced with the FIR requirements - a particular nightmare for fish products! We are deeply grateful both for the workshop insight and the following telephone support you have provided.



Rebecca Smith, Specification Manager, Five Star Fish Ltd.

Key achievements

- There was a need identified for a group to resolve issues related to labelling. Seafish were key in setting up a group within the Better Regulation framework. This group has proved very successful as an expert consultation group for government and has successfully resolved several issues. Following the success of this group Seafish were key in setting up a similar food hygiene group and we are now in the process of setting up a seafood group.
- Through contacts with industry, we became aware that UK prawn exporters were experiencing difficulties in other member states because of an interpretation of the EU additives regulations relating to 4-hexylresorcinol (4HR). We approached the FSA, pointing out that the regulation was open to misinterpretation and suggested that they recommend a more appropriate wording to the Commission. This resulted in an amendment to the European additives Regulation which removed the misinterpretation.
- We identified Enforcement Officers as a key stakeholder group we did not work with and with budget cuts there is a lack of training and guidance for enforcement officers, leading to different interpretations between authorities. We held a successful seminar for Trading Standards Officers (TSOs) which has led to better engagement which we hope to build on to become a first port of call for advice of enforcement of fish regulation.
- We developed an effective dialogue with the European Commission and also with EU stakeholders. The conclusions of this dialogue allow us to inform the UK seafood industry as quickly as possible about the EC decisions on IUU fishing regarding some specific countries. Thanks to this UK seafood industry were able to take important decisions on their business in these countries.
- We have regular conversations with the importers about topics that most interest them through a variety of channels. We sent regular updates on EU news related with several areas of interest and importers can react and share their views and concerns. By using social media tools we are able to immediately inform about news alerts and we can reach a wide audience. The Importers forum/panel meetings are also useful for dialogue and they serve as a valuable platform for a further interaction.



Objectives	Outputs	Outcomes
Provide a forum for industry, Governments and regulators to discuss issues <i>Food legislation meetings held as agreed. Marine meetings held until May 2013. Minutes on website</i>	Three marine legislation and three food legislation meetings per year <i>Food legislation meetings held as agreed. Marine meetings held until May 2013. (Suspended due to staff resources) Minutes on website</i>	Survey of industry opinion shows that Seafish have helped limit the burden from regulation <i>Reduction in burden of Regulation evidenced in testimonials</i>
Provide industry and Governments with early view of developing European legislation <i>Monthly Food newsletters circulated and on website. Monthly Marine newsletters circulated and on website, No marine newsletters Apr 14 - Nov 14. Marine work interrupted by staff resource. Now outsourced. Weekly Brussels updates</i>	Twelve marine and twelve food legislation newsletters per year <i>Monthly Food newsletters circulated and on website. Monthly Marine newsletters circulated and on website, No marine newsletters Apr 14 – Nov 14. Marine work interrupted by staff resource. Now outsourced</i>	Survey of industry opinion shows that Seafish provides an informed source of advice on regulation issues <i>Seafish Survey showed 83% agreement that Seafish advice was useful</i>
Informing industry and giving advice on impacts and implementation to Government <i>Reports published on proposals for industry, updates in newsletter, industry views collated for government. Labelling and traceability seminar to industry and enforcement officers. Industry presentations at UK and international seafood events</i>	Four issue papers per year <i>Regular updates on website and comprehensive guidance on Labelling, traceability and allergens, import and export, contaminant and hygiene legislation</i>	Tracked changes to regulation from initial draft due to our input, with impact assessments showing improved value <i>Tracked changes in Regulation in Monitoring reports by issue, newsletter updates by month, value demonstrated through testimonials</i>
Maintain networks for information sharing <i>Collaborative working with Trade Bodies and Government Departments, membership of industry/government groups</i>	Website hits (approx 1,500 a month on information pages) <i>Average hits around 1,700/month</i>	
Ensure that individual businesses can obtain impartial and confidential advice <i>Advice given on request or researched with regulators</i>	Survey of industry opinion shows that Seafish have helped limit the burden from regulation. <i>Evidenced in testimonials</i>	
	Survey of industry opinion shows that Seafish provides an informed source of advice on regulation issues <i>Seafish Survey showed 83% agreement that Seafish advice was useful</i>	

Progress against critical tasks:

Critical task from CP	Progress
<p>European horizon scanning, analysis and best practice</p>	<p>Brussels office established with one full time employee. Ongoing scanning of European communications, stakeholder engagement and analysis</p> <p>Industry have been kept informed with:</p> <ul style="list-style-type: none"> • Guidance on new fish labelling rules, new fish traceability rules, new requirements for allergen information and handling fish landed under landings obligation. • Up-to-date legislation information available on the Seafish website concerning Traceability and Labelling, Hygiene, Contaminants, Residues, Packaging, Importing and Exporting • Monthly newsletters on Food legislation updates and Marine legislation updates • Weekly newsletters on Brussels updates • Five Seafish seminars on labelling and traceability around UK for industry and one for enforcement • Presentations given: <ul style="list-style-type: none"> • GOAL 2014: 'Existing and forthcoming European seafood hygiene legislation' • World Seafood Congress 2013: 'The threshold of toxicological concern as a tool for managing the health risk from residues and contaminants' • AQUA 2012: 'Meeting the food security challenge while maintaining a high level of health protection' • NE Whitefish supplies forum November 2014: Labelling and consumer information

Critical task from CP	Progress
Engage with Government	<p>We have continuously engaged with government, primarily Defra, MMO, FSA, BIS, DofH, NMA, EA, Crown estate, JNCC (and devolved regional equivalents) on a wide range of issues. Our input has ranged from providing seafood-specific information to commenting on draft guidance, scientific protocols and papers for discussion at EU working groups and CODEX meetings</p> <p>We have highlighted the need for clarity in legislation and worked with government to bring clarity through guidance or legislative change</p> <p>This is made possible through membership of specific groups working with government on Food Hygiene, Food Labelling, Fish Names Committee, Better Regulation, Gang Masters licensing, as well as professional bodies on food science and technology and European bodies representing importers and processors and Port Health</p> <p>Some of the issues identified:</p> <ul style="list-style-type: none"> • Need for proportionate enforcement of labelling • Labelling of smoked fish • Misinterpretation of additive legislation • Water quality and inadequate protection via legislation • Marine licensing – aquaculture buoys requiring a licence
Marine and Food Legislation meetings	Three food group meeting held per year as agreed. This group is to be used as a Better Regulation expert group on Seafood. This will feed directly into government decision making and be a consultative body for government on seafood issues
Importers meetings	Two meetings were held a year as agreed
Bench mark/tracking surveys	<p>The Seafish stakeholder survey showed that overall satisfaction with Regulation at Seafish was 77%</p> <p>88% of respondents had asked for regulatory advice and 83% found it useful</p> <p>80% agreed that Seafish is an informed source of advice on regulation issues</p> <p>81% trust Seafish to be impartial and keep documents confidential</p>

Fishing Safety

KPI: Seafish will maintain the take-up of fishermen's safety training at 7,000 training places per annum

Our network of Approved Instructors and Training Providers helped us exceed this target, delivering 2,535 courses and providing 20,623 training places for fishermen over the 30 months of this Plan.

Safety statistics for the fishing industry published by the Marine Accident Investigation Branch indicate the impact of our work in trying to improve fishing safety. The MAIB's 2013 Annual Report, reported historical lows in the number of deaths and injuries to fishermen.



Case Study: Kingfisher Information Systems

Kingfisher: Helping to raise awareness and understanding amongst fishermen of potentially hazardous subsea offshore structures.

John Watt, ex Skipper and now Director of Marine Operations at the Scottish Fishermen's Federation (Services) said:

"For many years now, the Kingfisher division of Seafish has been managing services associated with improving fishermen's awareness offshore hazards and structures. These have been incredibly successful initiatives, working with UK fishing industry and the offshore industries, to promote understanding and coexistence. Although difficult to link these initiatives to reducing losses at sea, since the loss of the MFV Westhaven and crew in 1997, no vessel loss has been attributed to vessel snags on uncharted manmade structures. Some credit for this must go to Kingfisher and the services they manage."

Building on this successful platform, Kingfisher recently reacted to an industry drive to make better use of modern technology when communicating with fishermen. Kingfisher are now using Twitter to support the Kingfisher Bulletin to great effect, for broadcasting hazard alerts. These are accompanied with easy to understand Kingfisher Charts. The Scottish Fishermen's Federation have found this change very useful, allowing easy retweets to further pass the message on to Scottish and UK vessels.

A further advancement recently has been the FishSAFE Companion App, which was commissioned by FLTCS. Kingfisher project managed the development of this application for use on tablets, allowing fishermen to gain a better understanding of the size, scale and hazardous nature of offshore oil and gas structures.

The role Kingfisher plays in working with the Scottish Fishermen's Federation, other UK fishing associations and offshore industries, is vitally important and they continue to provide an excellent service for fishermen.



Key achievements

- Marine Survey – we exceeded our target for new Under 24m fishing vessel builds; this is encouraging as it evidences confidence in the future prospects for the industry and ensures that these vessels are being built to the highest safety standards. We failed to achieve our target for surveys of existing vessels whose owners wanted to register them for fishing; such vessels are not always built for fishing, so a reduction in their numbers could have a positive impact on safety.
- Kingfisher Information Systems - Continued to deliver this important safety service to industry at zero cost to levy thanks to funding from (amongst others) the oil and gas, cable and offshore renewable industries.
- Fishermen's Training - Exceeding our KPI target for the number of training places delivered has been a major achievement (against a backdrop of reduced demand for Under 16.5m Skipper's Certificate training); it was largely due to strong demand for our three-week Introduction to Commercial Fishing courses for new entrants and a (long-awaited) increase in demand for voluntary refresher training, particularly amongst experienced fishermen wanting to refresh their basic safety training by attending STCW basic safety courses (which are transferable for use in other maritime industries). We were also able to persuade a number of experienced fishermen to further develop their learning by attending more advanced courses like AEC (Approved Engine Course), ECDIS (Electronic Charts Display and Information System) and SSNR (Small Ships Navigation and Radar).
- Fishing Safety – we supported various industry-led PFD projects; after deciding to get actively involved in the PFD initiative, we managed the rollout in Northern Ireland and then secured £345k to ensure that every fisherman in England has access to one of these superb life-saving pieces of equipment. All of which has been expertly backed-up by our Sea You Home Safe campaign with the Reputation team.
- Onshore Training - Key achievements for onshore training during CP1215 include the establishment of Seafood Training Networks in Wales and Northern Ireland, delivery of 3,024 Seafish-certificated training places, recruitment of eight new fish and shellfish apprenticeship providers and registration of 595 apprentices in England, Wales and Northern Ireland and approximately 337 in Scotland. These 932 apprentices represent approximately £4m in funding support for the UK seafood industry.
- We commissioned the production of a basic safety course for stakeholders involved in harvesting shellfish from the inter-tidal area (often referred to as 'cockle pickers'); this course is about to be launched.
- We commissioned a new fleet of model fishing vessels to be used by our network of ATPs in delivering stability awareness training; six will be delivered by the end of March 2015.
- We have worked with the Fishing into the Future Initiative on the development of workshops for fishermen on fisheries science, sustainability and environmental awareness.

Fishing Safety

Objectives	Outputs	Outcomes
<p>Coordinate the delivery of safety training to fishermen, maintain the database of fishermen's training, and ensure reasonable access to training throughout the UK</p> <p><i>Achieved</i></p>	<p>900 courses delivered (pa)</p> <p><i>Achieved: 2,535 (equating to 1,014 pa)</i></p>	<p>Improved safety knowledge and skills amongst experienced and new entrant fishermen beyond minimum legal requirements. Assessed by test results from training courses</p> <p><i>Evidenced through: 4,800 experienced fishermen undertaking voluntary refresher safety training, 4,190 training places on our Under 16.5m Skippers Certificate (taken up), 550 new entrants who have attended our 3-week Introduction to Commercial Fishing courses</i></p> <p><i>Average student result for our courses is 90%</i></p>
<p>Identify and/or develop new safety training courses for fishermen in response to identified needs</p> <p><i>Achieved</i></p>	<p>7,000 training places provided (pa)</p> <p><i>Achieved to-date: 20,623 (equating to 8,250 pa)</i></p>	<p>Adoption of safer working practices and the latest safety equipment. Evaluated from post-training follow-up to identify changes implemented</p> <p><i>We gather feedback from experienced fishermen applying for our Under 16.5m Skipper's Certificate using a simple questionnaire. 25% of respondents said they had been involved in an accident; 31% had taken action to avoid an accident. Of those who had been involved in an accident 94% said that the knowledge and skills they had learned on our training courses had been used. Of those who had taken action to avoid an accident, 77% said that the knowledge and skills they had learned on our training courses had been used</i></p>
<p>Encourage fishermen to undertake additional voluntary safety training above and beyond minimum legal requirements</p> <p><i>Achieved</i></p>	<p>10,000 days training undertaken (pa)</p> <p><i>Achieved to-date: 26,084.5 (equating to 10,434 pa)</i></p>	<p>Ensure safety standards in the construction and operation of UK registered commercial fishing vessels. Evaluated by reduced numbers of non-compliances on vessels surveyed</p> <p><i>Our construction standards ensure that new vessel builds are safe and fit-for-purpose, and we have also inspected and provided comparison reports for over 300 existing vessels wanting to join the UK register of fishing vessels</i></p> <p><i>Non-compliances reported to the Maritime and Coastguard Agency (MCA)</i></p>

Objectives	Outputs	Outcomes
<p>Provide expert safety consultancy services on the construction and inspection of fishing vessels</p> <p><i>Achieved</i></p>	<p>£750k external funding levered (pa)</p> <p><i>Achieved: £1,434k for fishermen's training</i></p> <p><i>We secured a further £350k of external funding for PFDs (£255k from EFF and £95k from Seafarers)</i></p>	<p>Raised awareness and understanding amongst fishermen of potentially hazardous subsea offshore structures. Feedback from recipients of service</p> <p><i>New communications technology has been used to great effect, including Twitter and our new FishSAFE App. Fishermen's Federations, other UK fishing associations and offshore industries have all provided feedback confirming that the service provided by Kingfisher is vitally important (see detailed case study on page 20)</i></p>
<p>Provide up-to-date and relevant safety information on the location of potentially hazardous subsea and offshore structures and operations</p> <p><i>Achieved</i></p>	<p>10,000 fishermen's training records added to database (pa)</p> <p><i>Achieved: 20,623</i></p>	
	<p>Respond to 5,000 enquiries on fishermen's training records</p> <p><i>2,384 responses made</i></p>	
	<p>2,500 replacement/photo-ID certificates issued.</p> <p><i>1,650 issued (1,387 photo-ID cards and 263 duplicate paper certificates issued)</i></p>	
	<p>175 new under 24m vessel builds surveyed and certified to Seafish standards (70 pa)</p> <p><i>Achieved: 207 new builds have been surveyed and certified paper certificates issued)</i></p>	
	<p>500 existing under-24m vessels surveyed</p> <p><i>Achieved: 336 existing vessels have been surveyed</i></p>	

Fishing Safety

Objectives	Outputs	Outcomes
	25,000 fishing vessel plotter updates issued (10,000 per annum) <i>5,000 updates per annum for FishSAFE (oil and gas)</i> <i>600 updates per annum for FishSAFE Unit (oil and gas)</i> <i>3,000 updates per annum for KIS-ORCA (cables and wind farms)</i> <i>1,500 updates per annum for DKCPC (Danish cables)</i>	
	81,250 fortnightly safety updates issued (32,500 per annum) <i>c32,500 Kingfisher Bulletin per annum (130,000 of the four types of Bulletin – Cable, Wind, Oil and Gas and Aggregates)</i>	
	45 new development awareness charts produced (18 per annum) <i>Six new development or awareness charts per annum</i> <i>Six regional awareness charts per annum</i> <i>An average of eight wind farm charts per annum (now included within KIS-ORCA)</i>	

Progress against critical tasks:

Critical task from CP	Progress
Undertake a thorough review of Seafish's role and activities in fishing safety to find ways of reducing levy spend and to find a different way of funding fishermen's training delivery and implement agreed actions	Review completed in 2013 with help of stakeholder group; agreement reached with Sector Panels that (from Oct 13) levy would no longer be used directly to subsidise the cost of fishermen's training
Secure match funding for 12-month programme of support for fishermen's training delivery	Match funding for fishermen's training delivery has been secured from the Maritime & Coastguard Agency, European Fisheries Fund, Marine Management Organisation, Marine Scotland, Welsh Government, Department for Agriculture and Rural Development in Northern Ireland, Seafarers UK, Trinity House and the Scottish Fishermen's Trust

Progress against critical tasks:

Fishing Safety

Critical task from CP	Progress
Develop a new training course for fishermen to reduce fishing vessel accidents caused by machinery failure	We commissioned a project to investigate the root causes of accidents caused by machinery failure. It discovered that these ranged widely from fouled propellers to main engine failures. Following discussion at the Fishing Industry Safety Group's Fishermen's Training Group, it was decided not to proceed with developing a new course. Rather Seafish was asked to encourage more fishermen to develop their "engineering" skills and knowledge by attending the MCA's 30-hour Approved Engine course. In response, we extended funding to include this course and to-date 118 fishermen have completed it. We also agreed to raise the engineering requirements for our Under 16.5m Skipper's Certificate
Review and update all Seafish courses linked to the Seafish Under 16.5m Skipper's Certificate	We commissioned a project in 2012 to review and update the content of the Seafish navigation, engineering and stability courses that make up part of the requirements for our Under 16.5m Skipper's Certificate. The work was completed in 2014
Ensure continued delivery of marine services at zero cost to levy	As a group, Marine Survey and Kingfisher has continued to be delivered at zero cost to levy throughout the lifespan of this Corporate Plan. In 2014 a review initiated on the costs of our work in this area. This review recognised that the provision of advice and guidance by Marine Survey and Kingfisher staff was not charged-for but represented a significant call on staff time. The outcome has been a revised proposal of a £70k levy allocation for advice and guidance and a small increase in fees to ensure that our charged-for Marine Survey and Kingfisher services can continue to be delivered at zero cost to levy
Review our Memorandums of Understanding with the Maritime & Coastguard Agency	Our MoU with the MCA regarding our role in providing Marine Survey services to the fishing industry has been reviewed and re-written. It is currently with the MCA awaiting sign-off Our MoU with the MCA regarding our role in coordinating fishermen's training was not reviewed. Changes may be needed as the UK prepares to implement (in 2017) the International Maritime Organisation's Convention on the Standards of Training, Certification and Watchkeeping for Fishing Personnel (STCW-F)
Ensure Seafish's ongoing capability to deliver its statutory responsibilities regarding the administration of mandatory fishermen's basic safety training	We have expanded our network of Approved Training Providers (ATPs) and Approved Instructors. There are now 19 Seafish ATPs covering the UK and over 100 Seafish-Approved Instructors. We have approved a number of instructors based overseas, essentially to facilitate delivery of Safety Awareness training for crew working on foreign-owned, UK registered fishing vessels
Additional tasks dependent upon outcome of review	The review of our role in fishing safety encouraged us to consider other activities (other than what we have traditionally undertaken) to improve fishing safety. As a result we got involved in the Fishing Industry Safety Group's initiative to encourage all fishermen to wear a Personal Flotation Device (PFD) whilst working on deck at sea. We supported various industry-led EFF-funded projects and have taken the lead in securing external funding to extend this support to every commercial fisherman in the UK. Our Comms team has provided strong support on this initiative, launching the multi award winning Sea You Home Safe Campaign. To-date over 8,000 PFDs have been issued to fishermen and funds are in place to issue a further 4,000

Responsible Sourcing

KPI: Seafish Responsible Sourcing service is recognised as being credible and authoritative. Measured annually.

The service we provide takes many forms, from bespoke Tailored Advice projects, through to the new RASS tool and a wide range of more general publications, all of which are extremely well received across all key stakeholders.

The value this holds has been measured by testimonials, tracked download figures and by reviewing comprehensive feedback against specific areas of work.

Case Study: an Ecological Risk Assessment of the SW Fisheries

"As a retailer we are strong and long-term supporters of the South West Fisheries. The SW Ecological Risk Assessment that you have completed allows us to focus our efforts to tackle the real high risks within our South West supply chain rather than the oft misplaced emphasis prescribed due to assessing the supply chains with ill-fitting 'standard models'."

Huw Thomas, Fisheries & Aquaculture Manager, Morrisons.

Our **Ecological Risk Assessment of the SW Fisheries** project has been deemed a huge success by the cross section of key stakeholders involved, including representatives of the catching, processing and retail sectors as well as fisheries scientists. The output from the project will not only add value directly to the fishery for a long time to come but also enhances Seafish's reputation as being able to use our expertise, drive and collaborative approach to add tangible value to industry.

The model works as a screening method, using informed judgement to focus attention on the most important risks and screen out less important effects. Action can then be taken to improve existing or implement new measures or manage them through more formal channels such as EU regulations

Currently, the main source of information on responsible sourcing of fish products is based on scientific advice on the stock status of the main commercial species. However, fisheries in the South West fish for many species which are not subject to regular assessments, so conventional methods are unable to provide the full picture of the effects of fishing in the area. The new assessment was developed with Seafood Cornwall in order to conserve ecological processes and biodiversity whilst maintaining viable, sustainable fisheries in the region.





Key Achievements

- Launch of the Risk Assessment for Sourcing Seafood (RASS) in Sept 2014. RASS is an on-line tool developed to give the UK's commercial buyers assistance in sourcing seafood, enabling them to make informed decisions regarding the environmental impacts of the fisheries they are sourcing from based on their own business' tolerance to risk.
- Re-development of the Responsible Fishing Scheme (RFS): completion of a full review of the scheme resulting in the creation of new vessel standards and a new governance structure which will enable the RFS to become accredited to ISO17065.

The new scheme, now covering five core areas, will provide both the catching sector and UK supply chains with a mechanism to demonstrate their commitment to best practice from the quality and safety of a catch to ethical crew welfare.

- Trawl gear and selectivity training at Hirtshals flume tank: over 160 fishermen from UK took part in Seafish trawl gear training courses at Hirtshals flume tank. (Scotland 70, England 75, Northern Ireland 17). More of these courses are planned for the next few years with an emphasis on selectivity.

- Selectivity in Trawl gear: Three projects completed working with the devolved governments to develop discard reduction devices in nephrops fisheries as part of the cod recovery plan. One in Scotland, one in Northern Ireland and one NE England. All trialled innovative gears that proved effective and were subsequently included as options in fisheries legislation.



The fishery and environmental science required to support those decision making processes can be complex and highly technical, information is often difficult to find and even harder to understand by seafood buyers, processors and retailers. Here at Young's, we have fully supported the development of RASS and we foresee that it will play an important role within our own ever-evolving 'Fish for Life' program.

Mike Mitchell, Young's



Responsible Sourcing

Objectives	Outputs	Outcomes
<p>Provide an information source for the whole supply chain</p> <p><i>Achieved through Industry Issues Groups, the Tailored Advice programme and the production of numerous guides</i></p>	<p>Keep 38 Responsible Sourcing Guides (RSGs) (300+ stocks) up-to-date and develop robust database</p> <p><i>Achieved by the completion of Phase I of the population of RASS (all relevant fisheries featured within the RSGs featured)</i></p>	<p>Annual survey of key seafood buyers showing increase in the number using Seafish guides to inform their seafood purchasing decisions</p> <p><i>As part of the wider Seafish survey (2014) over 90% of the stakeholders were aware that we provide information regarding responsible sourcing of seafood and associated risks</i></p> <p><i>Unfortunately we didn't have the capacity to specifically target seafood buyers with an annual survey</i></p>
<p>Provide comprehensive information on environmental and economic aspects of responsible seafood sourcing</p> <p><i>Achieved through the delivery of several key projects; Responsible Sourcing Guides (RSG's); Risk Assessment for Sourcing Seafood (RASS); Development and Communication of Data Limited Stock Assessment Methods; and the Ecological Risk Assessments of the effects of fishing for the South West Fisheries</i></p>	<p>Develop the Responsible Sourcing Guides (RSGs) into a web-based database and measure increase in download rates</p> <p><i>Achieved within the launch of the RASS website; download rates will continue to be tracked as we encourage transfer of users from the RSGs to RASS throughout 2015</i></p>	<p>Increase corporate buyers' confidence in purchasing from regional sources. Measured by a confidence survey and testimonials</p> <p><i>Testimony received following the Ecological Risk Assessments of the effects of fishing for the SW Fisheries project confirmed that the project directly resulted in buyers being able to better focus their efforts as a direct result of the project</i></p>
<p>Work in partnership with academic and research institutions to gather science data on fisheries for use in stock assessment</p> <p><i>Achieved through the delivery of several key projects; the development and launch of RASS; the Development and Communication of Data Limited Stock Assessment Methods project and the Ecological Risk Assessments of the effects of fishing for the South West Fisheries project</i></p>	<p>Provide stock assessments summaries as needed up to four per year</p> <p><i>Achieved each year of the Corporate Plan through the publication of summaries aligned with new information being issued by ICES, usually during summer and autumn</i></p>	<p>Dialogue groups (CLG,DAG) provide opportunity for a wide range of stakeholders to discuss issues and decide on actions. Performance measured by canvassing feedback from the group</p> <p><i>Achieved through the meetings held</i></p> <p><i>Surveys of both CLG and DAG participants show that the groups are well supported and valued for; keeping up to date with latest developments; listening to issues raised by other parts of the industry; networking; and being part of a cross-industry structured discussion</i></p>
<p>Maintain the Responsible Fishing Scheme (RFS) whilst it undergoes a fundamental review.</p> <p><i>Achieved with over 600 vessels still with a certified or engaged status as we complete the final stage of re-development of the scheme prior to its re-launch during 2015</i></p>	<p>Three Common Language Group (CLG) meetings per year</p> <p><i>Achieved for each year of the Corporate Plan</i></p>	

Objectives	Outputs	Outcomes
<p>Bring aquaculture assessment into the remit of Seafish responsible sourcing assessment</p> <p><i>A full review was completed resulting in a clear view of Seafish's future engagement with the aquaculture sector and the inclusion of a new Domestic Aquaculture work programme within the 2015/18 Corporate Plan</i></p>	<p>Improve availability of tailored information on regional fisheries (both assessed and data poor)</p> <p><i>Achieved by the delivery of the Data Limited Stock Assessment Methods and the Ecological Risk Assessments of the effects of fishing for the South West Fisheries projects. RASS methodology is transferable and allows for increased granularity of profiles down to local scales</i></p>	<p>Discard Action Group action proposals are followed through including research demonstrations showing new gear results in less bulk of unwanted fish caught</p> <p><i>Achieved by the actions captured within the Gear Technology programme including revisions to the content of the Fishermen's Training courses ran at the Hirtshals Flume Tank in Denmark</i></p>
<p>Work with stakeholders to provide more effective and selective gear solutions to fishery-specific problems</p> <p><i>Achieved with over 160 fishermen from UK taking part in Seafish trawl gear training courses at Hirtshals flume tank and several sea trials completed, using the available Seafish equipment, to facilitate informed solution development at a local level</i></p>	<p>Three Discard Action Group (DAG) meetings per year</p> <p><i>Achieved for each year of the Corporate Plan</i></p>	
	<p>At least two new alerts to CLG and DAG participants each month</p> <p><i>Achieved each month through regular newsletters. Circulation lists for each group have grown, currently reaching a wider audience than at the start of the Corporate Plan</i></p>	
	<p>Industry adoption of gear changes developed by Seafish</p> <p><i>Achieved, through the completion of projects in Scotland, Northern Ireland and NE England, working with the devolved governments to develop discard reduction devices in nephrops fisheries as part of the cod recovery plan. All trialled innovative gears that proved effective and were subsequently included as options in fisheries legislation</i></p>	

Progress against critical tasks:

Responsible Sourcing

Critical task from CP	Progress
Maintain up-to-date information on stock status	<p>Completed</p> <p>The set of Responsible Sourcing guides by species will become redundant now the fishery profiles on RASS can be used to obtain up-to-date information on stock status</p> <p>We will continue to provide summaries of the new stock status information being issued by ICES; these are usually created during summer and autumn, and once TACs are agreed and published by the European Commission late January</p>
Develop a robust database to provide objective, scientifically derived environmental information on fish stocks to enable buyers to make informed choices when buying seafood	<p>Completed</p> <p>Our Risk Assessment for Sourcing Seafood (RASS) website was launched in Sept 2014 and has been populated with all of the key fisheries featured within the Responsible Sourcing Guides (RSGs)</p>
Fundamental review of RFS	<p>Completed</p> <p>The Responsible Fishing Scheme has undergone a comprehensive review and is currently in the final stage of modification prior to being re-launched during 2015</p>
Ensure DAG actions are followed through into implementation	<p>Completed</p> <p>Any actions identified have been captured within the Gear Technology programme including revisions to the content of the Fishermen's Training courses we run at the Hirtshalls Flume Tank in Denmark</p>
Maintaining and expanding the RASS database where appropriate	<p>Completed</p> <p>RASS has been populated with all of the key fisheries featured within the RSGs</p> <p>A steering group has been establishing to guide the future developments of RASS and expansion of the database of wild fishery profiles</p>
Database accessible from the Seafish website and from mobile phones, through suitable Apps	<p>Completed</p> <p>The RASS website formatting works for personal computers and mobiles with no need for an App to be developed</p>
Annual publication of a Sustainability Guide on the top 20 species supplied to the UK	<p>Completed</p> <p>Published as part of 'The Seafood Guide', available since May 2014</p>



International Trade

KPI: Seafish will review with principal exporters the service provision on export from Seafish. To be expressed as a percentage satisfaction level. Monitored every six months.

Satisfaction ratings amongst key contacts increased from an average of 47.5% to an average of 62.5% over the 30 months covered by the Corporate Plan.



Case Study: 'Seafood from Britain' Pavilions

Over the years covered by the 2012-15 Corporate Plan, Seafish has, in conjunction with major seafood exporters organised a 'Seafood from Britain' pavilion at the annual China Fisheries Expo.

The pavilion allows all the UK seafood exporters that are exhibiting at the show to gather under a British umbrella which provides greater visibility at an increasingly important exhibition.

As part of the overall offer, Seafish appoint a stand management company which is responsible for booking space, stand build, exhibition logistics such as shipping samples and where required producing graphics.

This arrangement means that the logistical burden of exhibiting at China Fisheries is taken on behalf of the exhibiting companies, a service that is greatly appreciated by new to market companies in particular as articulated by Roy Cunningham of McDuff Shellfish: "Without the platform of the British Pavilion organised by E2 and Seafish it would have been incredibly difficult for us to take our first steps into the Chinese Marketplace. The pavilion and its management solves the immediate and real challenges of navigating the cultural and organisational issues surrounding exhibiting for a company new to the market. In creating a presence, either as Britain or even as Scotland, companies have the opportunity to come together within a destination identity for visitors to the Expo where as if we arrived there on our own, one might become lost."



Key achievements

- Over the three years it has run, the buyers reception at China Fisheries has proved to be a very successful event providing a platform for the UK industry to entertain buyers, regulators and administrators from throughout South East Asia, highlighting the range and quality of seafood from the UK. Participating exporters have found it to be a good business networking event that has directly led to increased/new orders from the region.
- The information/meeting stands have proved to be very successful with UK companies visiting the exhibitions. Furthermore, leads generated at the exhibitions are fed on to UK exporters after the event.
- Seafish represent the UK as part of the EU delegation at full FAO COFI meetings and the COFI sub-committees on Fish Trade and Aquaculture.
- Twenty export guides have been updated and a further five added to the library. The annual downloads of the export guides have increased from a total of 11,422 in 2012 to 36,273 in 2014.
- Average satisfaction rating amongst key UK seafood exporting companies has risen from 47.5% to 62.5% over the period of the Corporate Plan.
- Industry engaged on the topic of food security. A survey on the subject was conducted with key stakeholders. This was followed up by workshops in NE Scotland, Humberside and London. A final report has been written and reviewed by stakeholders and published.



The Chinese market is now an integral part of our business and the Dalian / Qingdao show is essential for maintaining old customers and finding new ones. The show has allowed us to build a brand that is now recognised in China. We now sell directly to large distributors in China and the show allows us to develop these relationships.



David Markham, The Blue Seafood Company

International Trade

Objectives	Outputs	Outcomes
<p>Provide exporting companies with up to date market data</p> <p><i>Provision of 25 export guides available on the website</i></p>	<p>Three international exhibitions and show case events, supported by at least five UK companies, per year</p> <p><i>Pavilions at China Fisheries, World Food Moscow, Japan Seafood Expo. Information stands at Vietfish, Asia Seafood Expo, Conxemar and Seafood Expo North America. Receptions at China Fisheries, World Food Moscow and North Atlantic Seafood Forum</i></p>	<p>An increase in export value of 1% to the target countries by the end of the 30-month programme</p> <p><i>Cannot verify figures but major export companies confirm that sales have been buoyant</i></p>
<p>Provide assistance in raising the profile of UK seafood in export markets and in growing UK trade markets</p> <p><i>This is achieved arranging information stands, British pavilions and receptions at ket seafood exhibitions and events around the world</i></p>	<p>Three top level missions to or from countries exporting to the UK, aimed at their fisheries administrators, associations and regulators</p> <p><i>One delivered to Murmansk but programme then cancelled due to lack of uptake from UK companies (replaced by the information/meeting stands)</i></p>	<p>Trade mission activity will result in improved communication between supplying nations and UK buyers, and supply chain efficiencies. Participants in such missions will be surveyed to establish the commercial, relationship and logistic benefits derived from the missions</p> <p><i>The Murmansk mission resulted in a reciprocal visit to the UK by Russian producers</i></p>
<p>Support engagement with markets providing supply to the UK</p> <p><i>Included in the information stands are meeting facilities for use by UK visitors to the relevant exhibition</i></p>	<p>Twenty export guides written and available on the Seafish website by end 2013 and updated subsequently on an annual basis</p> <p><i>Twenty-five Guides available on the website</i></p>	<p>Export guides used by industry. Benchmark usage in first half of 2013 with an increase usage of 10% per annum in the next two years</p> <p><i>Seafood Export Profile download figures are: 2012 – 11,042. 2013 – 16,833 (+52%) 2014 – 36,273 (+115%)</i></p>
	<p>Participation in COFI and COFI sub-committee meetings and EU preparatory meetings – up to six per year</p> <p><i>Attended two meetings each of COFI and the subcommittees on Fish Trades and Aquaculture. Continued liaison with the DfID permanent office at FAO</i></p>	
	<p>Supply chain issues - up to two interventions and reports per year</p> <p><i>Icelandic and Norwegian supply chain projects completed. The target was missed due to a re-focusing of the workstream to concentrate on export support to help mitigate the impact of the Russian import ban on seafood products from the European Union</i></p>	

Progress against critical tasks:

International Trade

Critical task from CP	Progress
Up-to-date guides to the top 20 export destinations – produced and updated annually	<p>Completed</p> <p>Twenty five guides have now been published on the Seafish website</p> <p>Tracking figures show a year on year increase of hits in excess of 100% (16,837 in 2013; 36,273 in 2014)</p>
UK presence at up to three key international seafood shows per year	<p>Completed</p> <p>Sept - Dec 2012 – World Food Moscow and China Fisheries</p> <p>2013 - Tokyo Seafood Show, World Food Moscow and China Fisheries</p> <p>2014 - As in 2013 plus Seafex in Dubai</p>
Showcase events organised in three key export markets per year	<p>Completed</p> <p>Buyer receptions held at China Fisheries in 2012, 13 and 14; reception at British Embassy in Moscow to coincide with World Food Moscow in 2013; receptions at North Atlantic Seafood Forum in Norway in 2013, 14 and 15</p>
Up to three missions to UK supplier countries and potential supplier countries to develop high level relations	<p>Completed</p> <p>Mission to Murmansk, Russia and subsequent return visit in 2013. Further mission to Vietnam cancelled and the missions programme re-assessed due to lack of participation in 2013</p> <p>A programme of information stand/meeting areas introduced in place of missions in 2014. Info/meeting stands at: Vietfish, Ho Chi Minh City; Seafood Asia, Hong Kong; Conxemar, Vigo, Spain and Seafood North America, Boston (March 2015)</p>
Representation of the UK industry with EU, FAO, CITES and collaboration through membership of International Coalition of Fisheries Associations (ICFA)	<p>Ongoing</p> <p>Over the 30-month period of the Corporate Plan we have attended or arranged UK representation at FAO COFI and COFI sub-committee meetings, GSSI meetings and CODEX meetings as appropriate. Paul Williams has represented Seafish at ICFA meetings</p>



Regional Delivery - key achievements

Seafish England

- The annual Humber Seafood Summit continues to thrive, and now achieves an audience attendance of 200 delegates each year and a growing media presence
- A market data roadshow in 2014 saw Seafish England facilitating one-to-one meetings with seafood processors and importers with the aim of focussing on new information relevant to their business
- Facilitation of a Legislation Seminar in Grimsby for the UK processors to discuss the new labelling and traceability regulations.
- Seafish's successful bid to host and build an international programme for the World Seafood Congress in September 2015.
- A growing twitter following is spreading key Seafish news to local stakeholders
- Led by Seafish England, Project Inshore has assessed all English inshore fisheries using the Marine Stewardship Council Standard for sustainable fishing to produce tailored sustainability reports for every inshore district around the English coast. These will provide a roadmap of best practice and an independent evidence base to attract targeted investment in further scientific research.
- Lyme Bay Responsible Fishing Scheme has improved the profile and positive sentiment towards both Seafish and the RFS. Notable achievements as part of the project were the RFS accreditation of over 95% of commercial vessels in the region and having the first fully RFS accredited port.



Seafish Scotland

- Seafish Scotland manages the Inshore Fisheries Coordinator on behalf of Marine Scotland. As the key support function of all of the IFG Chairs, the Inshore Fisheries Co-Ordinator attends Executive Committee meetings and represents IFGs at relevant meetings.
- The Scottish Inshore Fisheries Conference has been organised and facilitated by Seafish Scotland.
- 2014 saw much activity with cable laying projects taking place in inshore waters. BT broadband to the Highlands and Islands has been a major project for most of the year, together with projects involving SSE and ongoing activity in the Clyde. The Inshore Co-Ordinator acted in a liaison capacity to ensure communication channels remained good between BT and inshore fishermen.
- Sustainable Inshore Fisheries Project – eight pilot projects in support of data gathering for inshore fisheries management in Scotland with a total budget of £1.413 million funded by Scottish Government, EFF and Seafish. The pilot is due to end in Sept 15 but the hope is that the results of the eight pilot projects will underpin a longer, larger EMFF application to benefit the Scottish inshore fisheries sector. Improving Market Intelligence. Exploring novel methods for improving the co-ordination of fishery production and market requirements / expectations. Availability, seasonality and marketing of lesser utilised 'minor' species. Demand and logistics issues. Understandable information for fishers.
- Integrating Fishery Management and Markets. Exploring the potential benefits of utilising Minimum Market Landing Size (MMLS) as an alternative to Minimum Landing Size (MLS) as a regional fishery management tool. In some markets and for some species the MLS is below the minimum size acceptable to or premium on the destination market.
- Dedicated Information Resource. Gathering up-to-date inshore fishery information and data together from various disparate sources in to an easily accessible, single access database and web portal. Support IFG management plans.
- Seafish Scotland provides administrative and project support to Seafood Scotland. Five Seafish Scotland employees deliver projects on behalf of Seafood Scotland and on behalf of the Scottish Seafood Partnership.

Regional Delivery - key achievements

Seafish Northern Ireland

- Eight Seafish Northern Ireland Advisory Committee meetings have been held with increasing numbers of industry, Government officials and scientists in attendance.
- A range of projects have been undertaken on behalf of industry during the reporting period, including a report on the value of Marine Conservation Zones in the Irish Sea to NI industry; a Fisheries Resource and Activities Mapping Project in collaboration with industry, DARD, Poseidon Consultants and Seafish NI; the Northern Irish Seafood Industry Case Studies project; and the Launch of Seafish Apprenticeships in NI with Southern Regional College.
- Communication with the NI industry has improved through the expansion of an industry database.
- Thirty monthly articles detailing Seafish NI activity in The Irish Skipper Magazine.
- A Seafish NI Regional page has been developed on the Seafish website and the @SeafishLynn twitter account, started in early 2014 has gained a maximum reach of 126,165.
- Seafish NI produced a film on fishermen's safety for the Seafish YouTube channel entitled 'How Personal Floatation Devices Save Fishermen's Lives', which has had over 6,000 views to date from a worldwide audience and has been used by the European Commission on their website as an example of a project which demonstrates a good use of EU funds.
- Seafish NI have facilitated and assisted industry in accessing over £1m worth of EFF funding for vessel modernisations, processing and aquaculture
- Seafish NI have also played a key role in the administration of EFF Axis 4 through the South East Area Fisheries Local Action Group (FLAG).
- Seafish NI has participated in a range of key industry Boards and Steering groups, including and most notably the local FLAG, the Inshore Fisheries Partnership Group and the Board of the Cross Border Aquaculture Initiative.





Seafish Wales

- The Seafish Wales Advisory Committee (SWAC) established to provide a forum through which Wales seafood industry representatives can input into the decision making process of Seafish.
- A monthly Seafish Wales E-newsletter was established in 2013 and provides an update on bespoke Seafish Wales projects as well as other relevant Seafish work to a growing audience of key stakeholders.
- A Seafish Wales Regional page has been developed on the Seafish website to provide stakeholders with Wales-specific Seafish updates. The webpage is updated monthly.
- An active @SeafishHolly twitter account has been established to engage with online stakeholders.
- Seafish Wales has been instrumental in supporting industry to establish the Welsh Waters Scallop Strategy, which aims to secure long term sustainable and profitable scallop fisheries in Wales. Seafish Wales continue to provide on-going technical and secretariat support to facilitate Strategy delivery.
- By request of Welsh Government, Seafish Wales has become a member of the three Inshore Fisheries Groups in Wales, the Wales Marine Fisheries Advisory Group and the Wales Fisheries Management Board, in order to provide advice and support the fisheries management process.
- Seafish led a successful consortium bid for the Welsh Government (WG) 'Framework Agreement for Fisheries and Marine Environmental Evidence', in collaboration with the Welsh Fisherman's Association and the Bangor Mussel Producers Association. This framework agreement for fisheries and marine consultancy services will enable WG to source the fisheries and environmental advice and information they need to achieve their Marine and Fisheries policy priorities and objectives.
- A Fish is the Dish Education Resource Pack for Welsh Primary schools has been developed in collaboration with the Seafish Marketing team and was distributed across Wales early 2014.
- The 'Seafood Training Network Wales' was launched in Autumn 2014 to support the growth of the onshore seafood sector in Wales through facilitation of training, skills development and education initiatives. To date the Network has delivered/supported five training courses, workshops and education events.
- A socio-economic impact assessment of cockle mortality in the Burry Inlet cockle fishery, South Wales, has been completed to highlight economic loss and livelihood impacts on the local industry and communities and provide management recommendations to Welsh Government and Natural Resources Wales going forward.
- Information on seafood hygiene, labelling and traceability has been made available to the Welsh seafood industry via dedicated labelling and traceability workshops, the publication of an online 'Quick Guide to Food Standards' and other useful information on the Seafish Wales webpage.
- A comprehensive list of seafood suppliers in Wales has been published on the Seafish Wales webpage and is still growing.

Information and Economics

KPI: Survey of industry and Government shows that Seafish market data and economic analysis are used in business decision making and policy development. Monitored annually.

Throughout the life of the Plan, our information and economics teams consistently met all data and analysis publication targets.

In the Information workstream, our monthly retail market reports were supplemented with detailed analysis reports. Through our industry issue groups, we have successfully brought together stakeholders from across the industry to progress work on key themes such as discards, aquaculture and ethics.

In the Economics workstream, our annual fleet and processor surveys have informed policy and business decision making.

Our performance has been evidenced through stakeholder surveys and through a regular supply of supporting testimonials.



Case Study: Fleet economic data, The Business of Fishing and Quay Issues

Each year, Seafish Economics researchers travel the coast of the UK interviewing vessel owners so that we can obtain the annual accounts of fishing businesses to help produce a time-series of fleet economic data for the UK. As well as accounts from businesses, we also receive official government fisheries statistics on activity, landings and fishing income at vessel level, so that we can make robust estimates of activity and costs for all vessels in the UK fleet.

Our data set can be used to inform business and policy decisions regarding the fishing fleet and also feeds in to the EU publication on the financial performance of the EU fishing fleets in each Member State. [See Fig 1.](#)

In order to give people confidence in our figures, they must be aware of our outputs and believe our figures are reliable. To have a large enough sample for our costs and non-fishing income (we receive data on activity and fishing income for every UK fishing vessel from the MMO), we must encourage vessel owners to submit their accounts to us.

To do that, we must create high profile and reliable outputs, interesting to policy makers and fishermen.

To help make people aware of the figures and analysis available, we produced a film, The Business of Fishing, featuring four forward-looking fishing boat owners giving them the chance to talk about operating a successful business in the modern UK fishing industry.

The film was presented to over 1,000 invited audience members at events around the UK and in Brussels, including the European Parliament. The film was also available via our YouTube channel and was viewed nearly 50,000 times.

To help vessel owners and policy makers understand the UK fishing business environment and how others are tackling business issues, we created Quay Issues, a new magazine which combines infographics based on our industry analysis with case studies from vessel owners, hoping to inspire people to take a fresh look at business issues they are facing and possible solutions that might work for them. Quay Issues has been a big hit with industry audiences and several thousand have been distributed.



Case Study: Industry Issues Groups

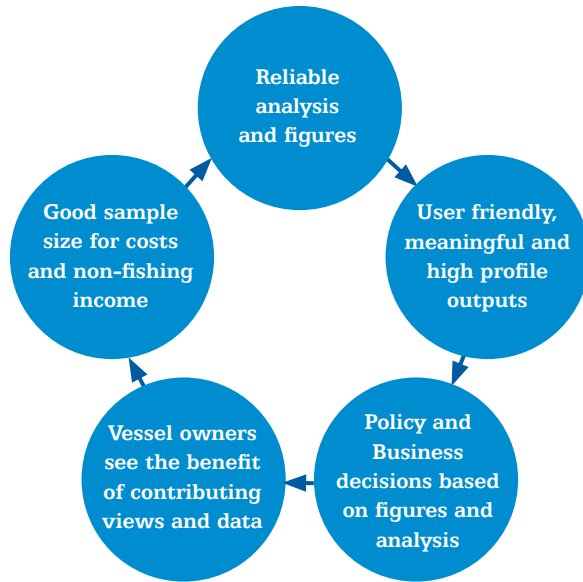


Fig 1. Case Study - Fleet economic data, The Business of Fishing and Quay Issues

Our industry groups cover a huge range of issues including fish stock status, environmental factors, policy concerns, discards, aquaculture, seafood integrity including ethics, seafood standards and reputational challenges, as well as pelagic and fishmeal interests. They are prime examples of an integrated, interdisciplinary, co-operative approach to key issues and are often the only UK cross-industry group addressing these issues from all perspectives. They are an invaluable way for industry to learn about new issues and to be kept to up to date on the latest developments and initiatives within their area of interest.

The groups are facilitated by Seafish and the feedback from attendees is that they really value the meetings as an opportunity to keep abreast of hot topics, to listen to the issues raised by other parts of the industry and to network with other participants. The number of meetings has remained constant and the number of attendees at each meeting has typically increased.

The number of people who have engaged with the groups has grown considerably during this corporate plan. Between 2013 and 2015 the total circulation list has increased from just under 400 to around 1,000 names. News alerts are issued regularly and surveys have shown that the news alerts are highly valued. The great majority of respondents thought the information was extremely useful and topical. Our new look newsletters, relaunched in November 2015, show that 40% to 60% of recipients are opening and reading the information provided in each newsletter they receive.

We regularly receive positive written and verbal comments from people who have attended our meetings. As this Plan concluded a full review was commissioned across all groups, with participant surveys delivered on DAG and CLG. The response was positive and all feedback has been used to shape our forward strategy.



Thank you for all your help with my numerous requests for data / insight over the last few months. It really does help with our decision making and I am always impressed by the quality of what you supply and the speed at which you deliver it to me.

Charlie Holland, Marketing Controller at New England Seafood





Many thanks for the recent dataset on the scallop fishery. This has been invaluable to support a project we are running for WWF on assessing the economic performance of the English Channel scallop fishery, which also forms part of ongoing workshops held by GAP2 and the North Western Waters Advisory Council (NWWAC) looking at options to improve management of the fisher.



Charlotte Tindall, Independent Consultant

Information Key achievements

- Our Market Insight newsletter has seen an increase in monthly circulation to 550 stakeholders and we achieved average opening rates across all our newsletters of 34% to 55%.
- Engagement with our Industry Issues Groups continues to grow. Almost all major retailers and processors are fully engaged with at least one of these forums. The circulation list for our regular issues-based newsletters has also increased, reaching 1,000 stakeholders on a regular basis.
- Responding to the media coverage on ethical issues in June 2014 and setting up a new group to address the concerns and way forward (Seafood Ethics Common Language Group).
- A number of guides and briefing notes covering a wide range of topics including Total Allowable Catch analysis, landing obligation, 'Guides to...' series, labour issues, numerous summaries of ICES advice, DNA testing, greenhouse gas emissions etc.
- Commissioned / part funded / delivered a number of other projects including: bulk uses for discards, use of discards in bait, Survey of warm-water prawns, Economic benefits of MSC accreditation.
- As part of a European consortium Acrunet (Atlantic Crab Users Network) we have produced trans-national recognised criteria for best practice in on-board handling and landing of brown crab; mapped the European brown crab supply chain; identified the main risks to the brown crab sector; and facilitated increased stakeholder collaboration across the European partners. Results of the Acrunet project are due for publication in June 2015.
- Sponsored two 'Celebration of Sustainable Seafood' events held at Billingsgate.
- Provided expert advice to Fisheries Local Action Groups (FLAGs) on shellfish focussed projects in East Coast fisheries. Through this, approximately £250k of funding was allocated to fish and shellfish projects.



Economics Key Achievements

- We took a lead role, working with the Prince's Charities' International Sustainability Unit, in planning and delivering the Fishing into the Future initiative, which has led to the development of a new industry-led body taking forward plans arising from the project.
- Economics team members contributed to Scientific, Technical and Economic Committee for Fisheries (STECF), via the plenary committee and several key expert working groups relating to fleet economic performance, balance of fishing capacity to fishing opportunities and the landing obligation. STECF is a key route to ensuring that appropriate expert economic advice is provided to the European Commission and other government and industry stakeholders via published STECF reports.
- European Association of Fisheries Economists Conference 2013 was organised by Seafish and had the highest attendance rate since 2007 conference, and included addresses from Lowri Evans, Director General DGMare and Richard Lochhead, Cabinet Secretary for Environment and Rural Affairs.
- We continued to facilitate and chair the UK Fisheries Economics Network, holding regular general meetings (23 was the biggest attendance to date at a regular meeting in September 2014) and special workshops to develop widely accepted best practice guidance on Estimating Economic Impacts of areas closed or restricted to fishing, and (in March 2015) comparing the values of industry sectors, with a case study comparison of commercial fishing and recreational sea angling.
- We commissioned and published an economic impact assessment of proposed new rules limiting fishing of deep water species in EU waters.
- Won the bid to host International Institute of Fisheries Economics and Trade 2016 conference in Aberdeen
- Developed a new processing sector data base which will support time series data analysis
- Published major report on economic impacts of landing obligation
- Highest ever levels of participation in annual fleet economic survey - over 600 forms completed in 2014 and more than 100 extra accounts permissions compared to 2013.
- We conducted an employment survey among the Scottish fishing fleet for Marine Scotland.
- We provided fleet profit forecasts to Defra ahead of each December Council during the Corporate Plan period and published updated forecasts based on agreed fishing opportunities.
- On behalf of the MMO, we commissioned and managed a pilot project to assess feasibility and collect economic data for the DCF from aquaculture businesses.
- Highly Commended for Best Video Campaign for The Business of Fishing at IOIC Scotland awards
- Our fleet economic performance estimation techniques were described as best practice by DEVSTAT review of Data Collection Framework practices across the EU

Information and Interpretation

Objectives	Outputs	Outcomes
<p>Provide economic evidence, expertise and advice to support operational or strategic business and policy decisions</p> <p><i>Delivered under the General Economic Advice project, including input via STECF, direct advice to industry and government, and Seafish economic publications.</i></p>	<p>Publication of Fleet and Processor survey as agreed with contractors</p> <p><i>Publications included:</i></p> <ul style="list-style-type: none"> • 2011-12 Economic Survey of the UK Fishing Fleet, published May 2013 • 2012 Seafish fleet economic performance dataset, published March 2013. This was the first time we made a time series of data available in Excel via our website • 2010 Economic Survey of the UK Fishing Fleet, published October 2012 • 2012 Survey of the UK Seafood Processing Industry, published October 2012 <p><i>The Business of Fishing - a film highlighting business issues in the fishing sector, screened from February 2013</i></p> <p><i>The Business of Processing - a film highlighting business issues in the processing sector, screened from September 2014</i></p>	<p>Economic evidence, analysis and advice being used in decision-making by industry and government. Established by testimonial</p> <p><i>Emails received thanking Seafish Economics for evidence, analysis and advice provided and illustrating use of outputs to inform policy negotiations, impact assessments and business decisions</i></p>
<p>Coordinate and respond to industry enquiries</p> <p><i>The Information team resolved 797 enquiries providing expert advice to stakeholders on a range of issues including market data, seafood processing and technology, packaging, waste and by-products</i></p> <p><i>Based on standard values rated per level of enquiry this has resulted in a total benefit of £877,900 over two years</i></p>	<p>Eight standard monthly reports on retail market</p> <p><i>Completed for each month of each year of the CP</i></p> <p><i>Increased to 10 standard reports in September 2014.</i></p> <p><i>Published in a secure area of our website and made available to stakeholders via a monthly newsletter</i></p>	<p>Market analysis data informing business strategies and tactics. Established by annual survey of industry</p> <p><i>Survey completed in 2013 showed that our data was being used for;</i></p> <ul style="list-style-type: none"> • Writing business plans and strategy • New product development, product launches • Marketing / marketing strategy • Market research • Informing business customers • Informing purchasing decisions <p><i>A further survey was completed as part of the wider Seafish stakeholder survey (2014). That showed almost two thirds of respondents used the information for business planning and strategy</i></p>

Objectives	Outputs	Outcomes
<p>Work with industry, stakeholders and academics to provide information</p> <p><i>We have implemented a series of improvements to the reports and worked with data providers and industry to shape these into a format that delivers the key requirements of the market data users</i></p> <p><i>Input from partners achieved via the UK Fisheries Economic Network, fleet and processor surveys and discussions at project level.</i></p>	<p>Four detailed analyses by retail sector</p> <p><i>Completed each quarter of each year of the CP</i></p> <p><i>Published in a secure area of our website and made available to stakeholders via a monthly newsletter</i></p>	<p>Stakeholder testimonials to provide information on benefits realised</p> <p><i>Each month we receive positive comments in response to the advice we provide and record feedback on our Workstream dashboards</i></p>
<p>Provide market analysis to inform business decisions about sourcing raw material, product development and marketing</p> <p><i>Achieved through the provision of the outputs and dealing with bespoke enquiries received</i></p> <p><i>Also through direct visits to seafood businesses and speaking at workshops and events</i></p>	<p>Four quarterly reports on foodservice market</p> <p><i>Completed for each quarter of each year of the CP</i></p> <p><i>Improved quarterly reports providing more detail in a revised format were implemented in 2014</i></p> <p><i>Published in a secure area of our website and made available to stakeholders via a monthly newsletter</i></p>	
	<p>Four quarterly trade reports</p> <p><i>Completed for each quarter of each year of the CP</i></p> <p><i>Improved quarterly reports providing more detail in a revised format were implemented in 2014</i></p> <p><i>Published in a secure area of our website and made available to stakeholders via a monthly newsletter</i></p>	
	<p>One full year summary report</p> <p><i>Annual trade report published for each year of the CP</i></p> <p><i>Published in a secure area of our website and made available to stakeholders via a monthly newsletter</i></p>	
	<p>90% response to enquiries within five working days</p> <p><i>100% of the enquiries dealt with were fully resolved within five working days</i></p>	

Progress against critical tasks:

Critical task from CP	Progress
Tender process for appointment of data supplier in partnership with AHDB. Supplier in place by April 2013	<p>Completed</p> <p>Although we did collaborate with AHDB on data providers, there was no business benefit to jointly purchase data. As such we issued a separate tender and a data supplier was in place by May 2013</p>
Financial and economic review of fleet and processor sectors	<p>Complete</p> <p>Publications included:</p> <ul style="list-style-type: none"> • 2011-12 Economic Survey of the UK Fishing Fleet, published May 2013 • 2012 Seafish fleet economic performance dataset, published March 2013. This was the first time we have made a time series of data available in Excel via our website • 2010 Economic Survey of the UK Fishing Fleet, published October 2012 • 2012 Survey of the UK Seafood Processing Industry, published October 2012 • The Business of Fishing – a film highlighting business issues and performance in the fishing sector, screened from February 2013. Viewed by over 1,000 invited audience members and over 45,000 views online <p>This critical task was also fulfilled by providing bespoke analyses of parts of the fleet and processing sectors in response to requests from industry and government stakeholders. These analyses are not usually published.</p> <p>Work continued throughout the period of the Corporate Plan to produce analyses published from April 2014 to March 2015:</p> <ul style="list-style-type: none"> • Seafish Fleet Economic Performance Estimates, published May 2014 • Quay Issues magazine, first edition published January 2015 • The Business of Processing – a film highlighting business issues and performance in the seafood processing sector, screened from September 2014. • 2013 Economic survey of the UK Fishing Fleet, published March 2015 • 2005-2014 Seafish fleet economic performance dataset, published May 2015 • 2014 Economic Survey of the UK Seafood Processing Industry, published March 2015

Progress against critical tasks:

Information and Interpretation

Critical task from CP	Progress
Service user review, January - March 2013	<p>Completed</p> <p>We issued a survey to our market data users in 2013 to obtain feedback on our service and identify areas for changes. Using this feedback we have implemented a series of improvements in our standard service, including employing another member of staff, updating the format and content of all our standard reports, introducing new species reports and working with data providers to address issues in data accuracy</p> <p>The rating of our service improved from 'good' to 'excellent' over two years</p>
Undertake a review and evaluation of work programmes and revise with industry	<p>Completed for Market Insight programme:</p> <p>Building on the improvements we made as a result of the service user review, we have also extended the range of reports that we offer and increased direct engagement with seafood businesses</p> <p>Completed for Issues Groups:</p> <p>Based on feedback we have implemented a series of changes where they were needed including changing meeting formats, venues, and updating newsletters. Further changes are planned in the next year</p> <p>Completed for Economics:</p> <p>Consultations with industry and government stakeholders led to a number of improvements in the data we present:</p> <ul style="list-style-type: none"> • Improvements to content and layout in the 2014 processing sector report March 2015 • The new fleet sector magazine, Quay Issues, was designed in response to feedback received from industry <p>Our inclusion of early estimates of fleet performance for the year just ended in the time series dataset available via our website was in response to requests from industry for more timely data</p>



“

They have made Seafish more accountable and allowed industry to get immediate feedback from people who know what they are talking about.

(Consumer and Supply Chain)

”



Shaping a better delivery

Originally established in 2012 following a Government-led all-industry review of our work, the Panels have now become a key component of our Seafish structure.

The Panels were instrumental in shaping our Corporate Plan 2012-15 and over the course of the last few years have played an influential role in shaping Seafish delivery, helping us define our areas of focus and agreeing a suitable allocation of resources.

Led by a Chair, who attends Seafish Board meetings, the Panels are made up of between nine and twelve members and are supported in their work by a Seafish member of staff acting as secretariat.

The Sector Panels cover all areas of the industry from catch to plate and at the time of our review, their membership was as follows:

From a Seafish perspective, the Panels have proved to be a great asset, but how has the process been experienced by the Panel members themselves? In February 2015, Seafish commissioned an independent survey to find out.

A topic guide was agreed with Panel Chairs, from which a standard question set was developed. In-depth interviews were conducted over the telephone with Panel Chairs, members and secretariat and of the 33 potential respondents, all but three were interviewed by the researcher.

Consumer and Supply Chain	Domestic and Export	Importers and Processors
Chris Lamb (Chair)	John Goodlad (Chair)	Brian Young (Chair)
Mark Greet	Martin Boyers	Stephen Brown
David Jones	John Butterwith	Peter Stagg
Katie Miller	John Cox	Simon Rilatt
Stuart Atkinson	Robert Duthie	Neil Auchterlonie
John Rutherford	Jim Evans	Gary Warner
Mike Mitchell	David Jarrad	Jonathan Shepherd
Catherine Pazderka	Martin Leyland	Steve Norton
Peter Tiffney	Malcolm Morrison	Richard Stansfield
	Jim Portus	Peter Doswell
	Dale Rodmell	

What the Seafish Panels had to say:

The Panels were strongly seen as performing a positive function in enabling Seafish to take industry views on board with two thirds of the respondents stating that the panels had positively lived up to or exceeded their expectations,. There were some respondents who went even further; about a third felt that the Panel approach had fundamentally changed Seafish.

Whilst there were some issues with proportionality, there were no issues with how Seafish managed governance.

“Fundamental change – Seafish going through the process of listening to Panels and industry views has been a breath of fresh air in determining how levy will be spent.” (Importers and Processors)

“Turned upside down the way Seafish decides what it does and at a stroke removed the opportunity for criticism that Seafish does work that is irrelevant and no-one wants.” (Domestic and Export)

“They have made Seafish more accountable and allowed industry to get immediate feedback from people who know what they are talking about.” (Consumer and Supply Chain)

“More effective and relevant today than they have ever been.” (Consumer and Supply Chain)

Most respondents felt that Seafish was now much more transparent with regard to how the levy was spent. A small minority of respondents were disillusioned and felt that the process was different but no more transparent than it had been in the past.

“None of us are totally convinced the Panels are getting their own way – even where there has been unanimity Seafish hasn’t responded to that. There is still a legacy of how Seafish has operated in the past that hasn’t been overcome.” (Importers and Processors)

“The opportunity to participate is a plus but I remain to be convinced that having a voice gives you the influence you think it has.” (Domestic and Export)

“If you want to know how decisions are being made you can see it very clearly now - everything is in the public domain.” (Consumer and Supply Chain)

Although the panel approach was accepted as the best way forward there were at least a third of the respondents (especially Importers and Processors) who made suggestions for improvement. The most frequently mentioned were:

- A need to begin succession planning. The right calibre of members with good commitment was fundamental to the process.
- More frequent panel meetings. There was a need to keep momentum going and to maximize the potential impact of the panels, allowing them to be more responsive to changes in industry needs.
- More cross communication across panels to create understanding and synergy.
- More representation from consumers/retailers.
- Be adaptable, flexible and forward focused.

The review is summarised over the following pages and the full Seafish Sector Panel Review Report is published on the Seafish website.



Perceptions of the Purpose/Remit of the Panels

Most respondents principally described two roles: to represent industry; and to provide strategic guidance/ direct the work of Seafish. One or two respondents on each panel also suggested that the panels had a role to play in reviewing Seafish's performance.

"To take a view on what Seafish should be doing – starting with a clean sheet of paper and working through how much they should be doing in each area." (Domestic and Export)

"To represent industry and make sure we are getting people to eat more fish." (Consumer and Supply Chain)

"To provide an industry view on the work that Seafish should be doing – to inform Seafish on the needs of industry." (Importers and Processors)

When they first heard about the idea of the Panels most respondents were positive, describing the approach as a fair process and a good way for Seafish to ensure that it was serving industry's needs. A handful even went as far as to say that the panels were a major step forward, changing the fundamental set up of Seafish to ensure that industries needs were prioritised.

"As soon as I heard about it I recognised the fundamental and profound nature of what was being proposed. I think a lot of people in industry are taking a long time to realise this isn't just another working group from Seafish – I wanted to be part of the step change." (Domestic and Export)

"This is a platform for all elements of industry to ensure Seafish are aware of our views and priorities and take that into account in a more formal way; more transparent and democratic." (Consumer and Supply Chain)

A smaller proportion were less positive when they heard about the Seafish Sector Panel approach. For some, the long history of 'Seafish doing as it pleased' meant there was a lack of trust and a degree of scepticism.

"I was sceptical because of how things had been historically. I thought I'd be sucked into a quasi-government department and our voices would be drowned out by people not wanting to rock the boat." (Importers and Processors)

Respondents were asked about whether the sector panels had lived up to their expectations – views in relation to this were mixed – even from individual respondents. About two thirds of the respondents had a broadly positive opinion of the impact of the panels and felt that this was the best approach for now.

"By in large yes, they have achieved their basic objectives." (Importers and Processors)

"Very good way for Seafish to engage and make sure they are relevant for the 21st century." (Importers and Processors)

"There is little doubt that the sector panels have been good for the seafood industry." (Consumers and Supply Chain)

Perceptions of the Purpose/Remit of the Panels

The fact that Seafish had a responsibility to respond proportionately was a frustration for those on the Domestic and Export Panel, some of whom felt their views and needs were wrongly overlooked. Conversely, there were respondents on the Importers and Processors Panel who felt that Seafish was protecting its own interests and historic areas of work by continuing to support the needs of the domestic catching sector, even though their contribution to the levy was significantly less.

“Having more people in the process is better because you get more balanced opinions but you also get more conflict in how the money is spent... in trying to be more inclusive the danger is it becomes less effective as there are too many interests expressed.”

(Importers and Processors)

“For something that was started from scratch...the result was good. Industry is split but this was an opportunity to collectively agree on a few main points, it won’t deflect fractions in the sea fish industry... we will never agree.” (Domestic and Export)

“I work with the whole supply chain and getting lots of different sectors to agree is not always easy.” (Consumer and Supply Chain)

More than a third of the respondents spontaneously described the Panel approach as being more rigorous, transparent and democratic and almost all Panel members agreed this was the case with prompting. Yet there still remained this fundamental challenge for Seafish in representing a broad industry with complex, differing and often conflicting needs. Many of the respondents thought Seafish did a very good job of balancing these needs and priorities but it was felt important to acknowledge that not everyone was satisfied with either the process or the outcomes.

“It’s notable that probably about 60-70% of the Corporate Plan is agreed by all three panels at their own meetings - it’s the other bit where there is potential conflict that has to be negotiated but it’s working pretty well.”

(Importers and Processors)

“I agree with the concept but the obstacle is we have two other panels and larger levy contributors - it doesn’t feel like a democratic process - they shouldn’t be able to determine the direction of things because of the amount of levy they pay.” (Domestic and Export)

“It has generally lived up to my expectations – I must say the professionalism of the minute taking, back up support and chairing has been excellent – overall a good exercise.” (Consumer and Supply Chain)

“

As soon as I heard about it I recognised the fundamental and profound nature of what was being proposed. I think a lot of people in the industry are taking a long time to realise this isn't just another working group from Seafish.

(Domestic & Export)

”

The Role and Remit of Panel Members

The respondents were all asked about their role and remit as an individual Panel member. The respondents all described a role which was multi-faceted and included representing their sector, representing their organisation and bringing their specialist expertise to help the panel make decisions.

“Helping to shape the agenda for the Corporate Plan - challenging, scrutinising ideas, general debate to reach a consensus agreeable to all.” (Importers and Processors)

“I represent a marginal sector - I’m a lone voice but better than no voice.” (Domestic and Export)

“I represent my company and sector. My role is to make sure Seafish represents aspects of industry and understands the market facing dynamics, not just the supply chain.” (Consumer and Supply Chain)

There were also small minorities of respondents who identified the following as part of their role as a panel member:

- Representing my region / local area
- To challenge and scrutinise Seafish plans
- To give forthright opinions
- To challenge other members of the Panel
- To consult with colleagues before meetings and feedback after panels

Each of the Chairs and Secretariat noted that within each Panel there was variation in how individual members approached their role, remit and responsibilities

It was of interest to understand the way in which members interacted with colleagues in industry. Specifically the research was concerned with

establishing the extent to which formal or informal routes of communication were used to gather opinion from industry and share information about the Panels and Seafish. In each Panel there were a mix of formal and informal communications and a minority who did not see it as their role to communicate to wider industry.

There was a small proportion of panel members (about a tenth) who did not specifically gather information from colleagues in industry prior to meetings nor did they report back to their industry or sector on what was happening with Seafish and the Panels.

“The minutes of the Panel meetings are in the public domain for anyone who is interested. Does that communication happen from Panel members in any formal way? Probably not but there is forethought and afterthought.” (Importers and Processors)

Just over half had a formal mechanism through which they would gather industry feedback and then report back on what had happened at the Panel. Often this would mean seeking guidance and reporting to a Board for the association/organisation they represented. Some of those representing a trade body would seek guidance from their wider membership but not always formally. Others would communicate within other industry forums and committees. Importer and Processor Panel members were more likely to use informal approaches.

“I send out weekly bulletins to the association so there may be a paragraph in there from time to time.” (Domestic and Export)

“I circulate agendas to the board and ask for their take on things.” (Consumer and Supply Chain)



There were some examples of excellent practice including one respondent who surveyed the membership of his trade association bi-annually in advance of panel meetings and another who had set up a local “working group” to discuss Seafish panel business and other local issues.

Just under half used more informal approaches to gather views and disseminate information. For the most part this took the form of discussions with colleagues in industry at other committee meetings or industry events.

“I will discuss some things with my Board and take guidance from them but I tend to be more informal. With my experience in industry I can look at the agenda and think of a solution or answer from my sector without having to go for a formal mandate which could be restrictive... people trust me.” (Importers and Processors)

“It’s very informal, I have no formal pathway or budget for anything else.” (Domestic and Export)

“I use the panels as an opportunity to bring the wider issues I encounter in my working life into a forum where Seafish can hear about it and then we can discuss how Seafish can help.” (Consumer and Supply Chain)

Most respondents (over two thirds) felt that panel members had a responsibility to support and promote Seafish in as far as they had been party to developing and agreeing the Corporate Plan.

“If you are a panel member you are there to be supportive and fly the flag for Seafish and be a critical voice or a sounding board where needed.” (Consumer and Supply Chain)

“Part of the process is there is a collective responsibility to defend the Corporate Plan we’ve been part of. This doesn’t extend to an unqualified defence of Seafish but in relation to the Corporate Plan and the process.” (Domestic and Export)

“Yes, although the problem can be that you don’t always agree with what is going on.” (Domestic and Export)

It was noted that there was a need for support from Seafish in order to facilitate this and also that panel members should not be expected to become Seafish spokespersons.

“I need tools to help me support and promote Seafish – information I can easily share with partners to help identify where Seafish can work with retailers.” (Consumer and Supply Chain)

“Yes...the comms team are more professional with more resource and understand the whole picture. The Panel member may not be the best spokesperson but he can actively represent what he has been involved in.” (Importers and Processors)

There was a small proportion (less than a quarter) who did not perceive supporting and promoting Seafish to be part of their role. For some of these respondents this was related to a lack of time, resource and expertise. There were also a small proportion who noted that they could not support and promote an organisation that they did not feel was accurately representing their interests and those of their sector.

“No, members’ first responsibility is the job and the business they represent.” (Domestic and Export)

“No, we’ve not been asked to I don’t go along with everything they do anyway. I’ve been candid when I talk to people and it’s better than it was.” (Importers and Processors)

Representing Industry

On the whole the panels were seen as providing an accurate representation of industry.

On each panel there were a couple of respondents who thought the balance wasn't quite right. On the Consumer and Supply Chain Panel, there was thought to be a lack of import, farming, consumer/retail as well as too many operational/technical people. On the Domestic and Export Panel there were two respondents who thought there were too many catchers. On the Importers and Processors Panel there were perceived to be too many trade bodies and not enough industry experience or people dealing with fresh produce.

Almost all the respondents thought the size of the panel they sat on was about right.

"It's small enough for discussion and large enough to show differing views; if it was much larger it would be difficult to have constructive conversation." (Consumer and Supply Chain)

A couple of respondents noted that most panel members and chairs had been in post now for more than three years and that it was time to begin introducing new panel members and succession planning for the chairs.

One respondent noted that whilst the structure of the panels might well reflect industry at present it was important to ensure that the Panels had an eye to the future as well and consequently should have more aquaculture representation.

Perceptions of Industry Awareness and Attitudes Towards the Panels

About half of the respondents thought that wider industry was not really aware of the impact of the panels. It was noted among these respondents that communicating with wider industry was very challenging - the Domestic and Export Panel were most likely to say that wider industry lacked awareness and most likely to point out the diversity of their sector as a barrier to communication.

"It's about communication - Seafish do communicate quite well but the levy paying community is quite diverse and large - it is difficult for Seafish to communicate across the piece and reach everyone who has an interest." (Consumer and Supply Chain)

"Seafish haven't done themselves any favours by not communicating more - some of my smaller members think of it as a tax office and at grassroots level in industry they don't see what they get." (Importers and Processors)

Just under half of the respondents were slightly more positive suggesting that broadly speaking industry understood the premise of the panels and whilst there was room for improvement, those who were interested knew what was going on.

"People who are not involved think they know best. For what it's worth I think Seafood is doing an impossible job pretty well." (Importers and Processors)



“A lot of these folk are hands on working on the boats and they are not going to be thinking - ‘oh I wonder what Seafish is up to I’ll just check their website and see’! Seafish isn’t on their agenda because as far as they are concerned it’s just another tax.” (Domestic and Export)

The Domestic and Export respondents were most prolific in making suggestions about how to improve awareness of the impact of the panels on Seafish. Their suggestions primarily focused on having panel members and Seafish staff visit regional areas to talk about local issues and concerns. It was felt that Seafish had poor visibility at this level of industry and needed to consider other ways of reaching this audience.

A small proportion from the other two panels also suggested that there was a need for more networking events and that panel members could take on a role of championing Seafish.

It should be noted that within all three groups there were respondents who firmly pointed out that they felt this was a Seafish issue and not the responsibility of panel members who had too many other commitments.

“Not all panel members see themselves as ambassadors for Seafish; we need to take responsibility for interrogating, supporting and championing the Corporate Plan.” (Consumer and Supply Chain)

The respondents were asked about the extent to which Seafish was seen by industry as the authority on sea food. Perceptions were again mixed. About a quarter were positive and felt that Seafish was highly regarded within industry (especially Domestic and Export). The largest proportion held a more mixed view commenting that Seafish were independent where industry could not be but that conversely Seafish may not have the expertise of some big brands or specialised trade associations.

“Private businesses think they have the authority but it’s fair to say they can’t deliver a message because it is seen as self-serving - Seafish has a reasonable reputation for being neutral.” (Importers and Processors)

“We applaud the aspiration - it’s where Seafish should be but they are never going to have the level of expertise that someone doing the job all the time has. Seafish don’t understand pressure on businesses - they are good at working at mid management level but not at the top level of industry - they are not visionary.” (Consumer and Supply Chain)

A small minority disagreed completely that Seafish was the authority on sea food because it either did not represent their sector well enough or it was described as a government quango. This conflict was raised at other points in the interviews by other respondents who felt it was not possible for an organisation to be responsive to industry needs if it was ultimately controlled by government.

“It’s not The Authority - that is self-proclaimed.” (Domestic and Export)

It should be noted that a minority of respondents did not think being the authority on sea food was an appropriate objective or claim - it was perceived to sound arrogant and dictatorial.



Format and structure

Just over half of the respondents thought the current frequency of two to three meetings each year, with the option for more if needed, was ideal. Several of these respondents felt that bigger commitment of time was unreasonable and or unsustainable.

Just under half of the respondents (across all panels) felt that meetings were required three to four times per year in order to keep the momentum going. These respondents argued that less frequent meetings meant that more time was needed at each meeting to go over what had happened previously, with less time for in-depth debate and looking forward.

**“Meetings are too far apart – they feel quite distant and I would like time to get more in-depth – maybe meet every two months?”
(Consumer and Supply Chain)**

“There can be long gaps and members, despite regular email updates, lose impetus for the whole panel approach – they aren’t thinking about Seafish and their role on the panel until the next meeting.” (Domestic and Export)

The length of the meetings and time of day was seen as entirely appropriate. A small number of respondents from more remote areas noted that always holding meetings in London meant that they had to make considerably more effort with regard to travel than others.

Respondents were very vocal in praising the chairing of the meetings as well as input and preparation by Seafish staff. The meetings were all spontaneously described as well run and everyone had a good opportunity to put across their viewpoint. Communication between Seafish and the panel was also seen very positively and there were no issues raised with regard to this.

Proportionality

Without prompting, many respondents raised the issue of proportionality during the research. Just under half of the respondents, from across all three panels, said that the balance of power and input into the Corporate Plan was fine. Nearly a quarter of the total sample thought the process was broadly fine but would benefit from more interaction, communication or even meetings across the three panels.

“It would be interesting to see the commonalities - the three panels broadly identified the same macro themes and the differences were in interpretation, depending on where you stood in the supply chain. The idea of putting in a phase to let the panels explore holistically how their three areas of work synergise is appealing.” (Consumer and Supply Chain)

“All panels have equal importance. Within them there are strong personalities that can dominate and cause frustration but they all have consistent influence.” (Consumer and Supply Chain)

About half of the respondents from the Domestic and Export and Importers and Processors panels and a small minority from Consumer and Supply Chain were unhappy about the balance of power. On the Domestic and Export panel there was a perception that proportionality based on the levy was unfair to the catching sector; it was also noted that this panel sometimes struggled to come to a consensus itself. Conversely on the Importers and Processors Panel it was often felt that proportionality was not delivered because of the influence of the domestic sector.

“Proportionality is a function of the panels - the evidence is that it is not delivered on. The balance of power is disproportionate to the domestic sector as it has the ear of rural politicians and shouts the loudest.” (Consumer and Supply Chain)

“Our priorities don’t relate to the Corporate Plan - it’s a pointless process because we can’t influence it. For that reason it’s difficult to promote the process when you don’t believe in it - it’s valuable but it doesn’t work for everyone.” (Domestic and Export)

“There is an inherent conflict of power built into this because of proportionality - so automatically the perceived balance of power lies with importers and not domestic industry. The conflict is handled well by the chairs but the problem comes when fishermen want certain work done which blows out proportionality but Seafish will listen to them because they are protecting their own interests and areas of work.” (Importers and Processors)

Where next? Key themes and areas for action

Overall the Sector Panels were broadly seen to be working well. Most thought they were a good way for Seafish to engage with and properly represent the needs of industry. A small proportion remained sceptical about the ability of the panels to influence Seafish but the vast majority noted that the panels had positively lived up to or exceeded their expectations, some were more critical.

Respondents saw their role as a panel member as being multi-faceted. There was variation in the nature and level of commitment that panel members felt was required and desirable. For example, not all panel members perceived it was part of their remit to cascade information from panel meetings back to their sector. There was also variation in the amount of time that members were willing or able to give to the panel process.

Many of the suggestions for how the panel approach could be improved require input of panel members – most notably an increase in the number of panel meetings, cascading outcomes of panel meetings to industry and more cross communication between panels. If there are to be increased expectations of panel members it has to be acknowledged that not all panel members will be in a position to respond.

There is a need for consideration to be given to succession planning.

It was raised often during the research that one of the areas on which all three panels agreed was the need to increase consumption of fish. With that in mind, it was felt to be critically important to ensure that consumer needs and wants are fully understood and taken into consideration through the panel process.

There is still perceived to be a lack of awareness in wider industry of the impact of the panels on Seafish. Whilst acknowledging the inherent challenges, the respondents identified a range of approaches for consideration including regional events and annual seminars.

The issue of proportionality was raised frequently during the research. It was apparent that many did not fully understand the process that resulted in the final Corporate Plan; more needs to be done to communicate this more clearly.

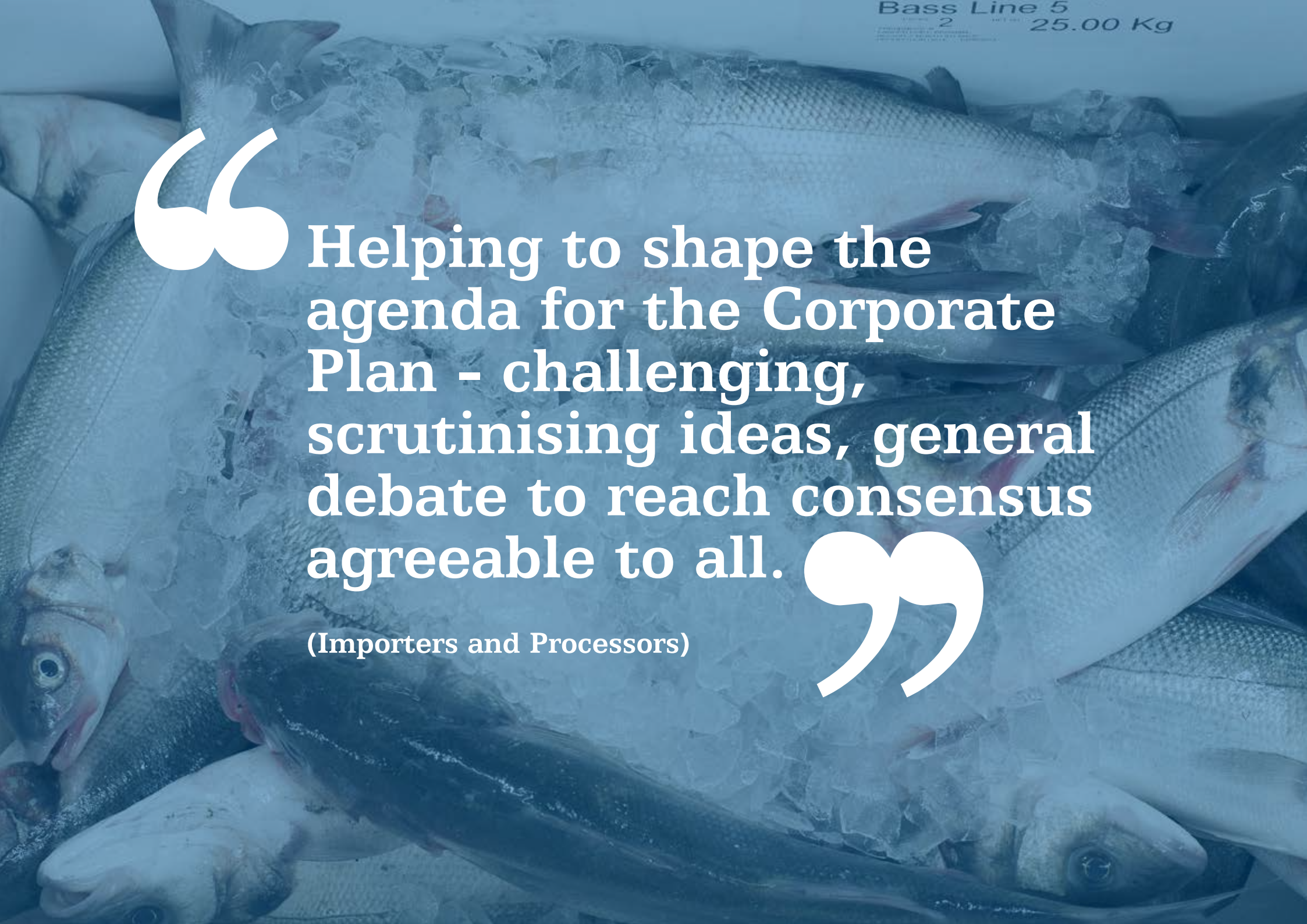


The Sector Panels have played an influential role in shaping the Seafish journey. Panel members not only provide a sense check on our operations but are a source of inspiration and support, keeping us close to our industry colleagues and ensuring the work we deliver is relevant and timely.

The feedback we have gained through the Panel review will be used to inform future panel operations and we will continue to seek ways of improving the relationship with members and maximising the opportunities our Panel process offers.

Paul Williams, Chief Executive, Seafish





“ Helping to shape the agenda for the Corporate Plan - challenging, scrutinising ideas, general debate to reach consensus agreeable to all. ”

(Importers and Processors)



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We regularly request feedback on our work and encourage the contributions of all stakeholders.

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