

Accelerating Social Responsibility in the Seafood Sector: From Fragmentation to Systemic Change

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1. EXECUTIVE SUMMARY

Despite growing attention to labor abuses and human rights risks in seafood supply chains over the past decade, progress toward sector-wide social responsibility remains limited and fragmented. While a wide range of initiatives have emerged in recent years, widespread adoption and institutionalization of socially responsible practices has yet to occur.

To better understand why progress has stalled and how it might be accelerated, we conducted a workshop series applying the Sustainable Market Transformation (SMT) framework developed by Lucas Simons and André Nijhof. The SMT model focuses on how market incentives shape collective behavior, and how systemic change requires shifting the underlying “rules of the game” rather than relying on isolated projects or voluntary action alone. Through a series of collaborative workshops, participants developed a shared future state vision for socially responsible seafood, mapped current system dynamics and feedback loops, assessed the maturity of existing initiatives, analyzed stakeholder roles across phases of transformation, and identified strategic priorities for accelerating progress.

The analysis found that the seafood sector is currently stuck between Phase 1 (projects and pilots) and early Phase 2 (first movers and competition) of the SMT process. While civil society has played a critical role in raising awareness and launching initiatives, the movement remains characterized by fragmentation, duplication, mixed messaging, and competition for funding and influence. Governments remain largely reactive and insufficiently engaged, while industry uptake remains concentrated among a relatively small group of frontrunners. Collectively, these dynamics have limited coordination, reduced clarity for market actors, and slowed progress toward broader adoption and institutionalization.

A central finding of this work is that the seafood sector does not lack activity, but rather greater alignment, coordination, and scalable approaches. The overarching barrier identified through the workshop series was a lack of shared strategic direction across NGOs and funders, resulting in fragmented efforts that often reinforce rather than resolve systemic barriers. Participants therefore identified the need to shift from isolated, project-based approaches toward more coordinated, systems-level action grounded in collaboration, alignment, and scaling approaches already demonstrating impact.

Several strategic priorities emerged from the discussions, particularly for civil society actors. These included creating a shared theory of change for system transformation, reducing duplication by consolidating existing tools and initiatives, aligning messaging and asks directed toward industry and governments, and leveraging expertise and lessons learned from other sectors. Participants emphasized that meaningful progress will depend less on launching new initiatives and more on strengthening coordination, clarifying roles, creating clearer signals for market actors, and building momentum around approaches capable of achieving system-level impact.

Recognizing the importance of moving from analysis to action, the workshop series also identified several practical, low-lift opportunities for collective action in 2026–2027. Recommended starting points include convening a small core group of NGOs and funders to align around a shared baseline and transition strategy, establishing lightweight coordination mechanisms, and facilitating cross-sector learning exchanges to inform future collaboration and scaling efforts. These actions are intentionally modest in scope, and designed to begin building trust, reducing fragmentation, and creating momentum for more coordinated and institutionalized action across the seafood sector.

2. OVERVIEW

2.1. CONTEXT

Seafood supply chains face significant human rights risks, with recent lawsuits and investigations exposing forced labor and exploitation across the sector, ranging from cases involving Indonesian fishers and major brands to reports on abuses in China and India's shrimp industries. Despite these challenges, seafood sustainability has historically focused on environmental issues, with social accountability lagging behind. While initiatives such as human rights due diligence and social certifications are emerging, widespread labor abuses persist across fishing, farming, and processing.

2.2. GOALS OF THIS WORKSHOP SERIES

To understand why social responsibility lags behind environmental sustainability in seafood, we applied the Sustainable Market Transformation (SMT) framework from *Changing the Game* by Lucas Simons and André Nijhof. This approach focuses on how market incentives drive collective behavior, and how shifting those incentives can enable more sustainable outcomes.

Our goal was to identify how to accelerate progression of the social responsibility movement by aligning stakeholders and moving beyond fragmented efforts. To do this, we used the SMT framework and convened a group to:

1. Analyze systemic barriers (i.e., uncovering why the sector is stuck and not progressing toward system-level social responsibility adoption);
2. Map current initiatives and stakeholder roles to understand the current state of affairs, and explore who should be doing what where to move things forward on a systemic level;
3. Build a shared understanding of how to shift from competition to alignment within civil society; and,
4. Define immediate, actionable steps to move the sector forward and create momentum for action and urgency to move forward together.

Through facilitated discussions, retrospective analysis, and future-oriented thinking, we developed a collective view of both the challenges and opportunities ahead. Ultimately, this process aimed to align stakeholders around a shared vision and unlock more effective pathways to address the structural drivers and power imbalances that perpetuate labor abuses in seafood supply chains.

The following section provides an overview of the SMT model applied throughout this workshop series, including its key components and how it can be used to shift incentives and drive more socially responsible outcomes in the seafood sector.

3. THE SUSTAINABLE MARKET TRANSFORMATION MODEL

In *Changing the Game: Sustainable Market Transformation Strategies to Understand and Tackle the Big and Complex Sustainability Challenges of Our Generation*, Lucas Simons and André Nijhof argue that sustainability challenges across sectors stem from similar underlying system failures. As a result, the pathways to driving meaningful change are also consistent and require addressing the root causes that shape behavior within markets.

The Sustainable Market Transformation (SMT) model provides a framework for doing so. It focuses on shifting the incentives that drive collective behavior across an entire system of actors with diverse motivations. Because these systems are complex and interconnected, achieving sustainability requires more than isolated interventions and demands a systemic approach that aligns incentives to reward responsible practices and make them the norm.

Therefore, understanding how to transform markets begins with understanding why they produce unsustainable outcomes in the first place.

3.1. WHY DO MARKETS BECOME UNSUSTAINABLE?

3.1.1. Underlying structures are causing the problems we see

In systems thinking, visible problems are not the root issue but symptoms of deeper underlying structures. Like an iceberg, the unsustainable outcomes we see are shaped by hidden layers, including collective behaviors driven by incentives (the way we make decisions and behave, which is typically linked to success), underlying power structures (the way we are incentivized to behave), and societal values and beliefs (**Figure 1**). This is why change is difficult: addressing surface-level symptoms has limited impact. Meaningful change requires shifting the deeper drivers: how incentives are structured, how decisions are made, and what behaviors are rewarded.

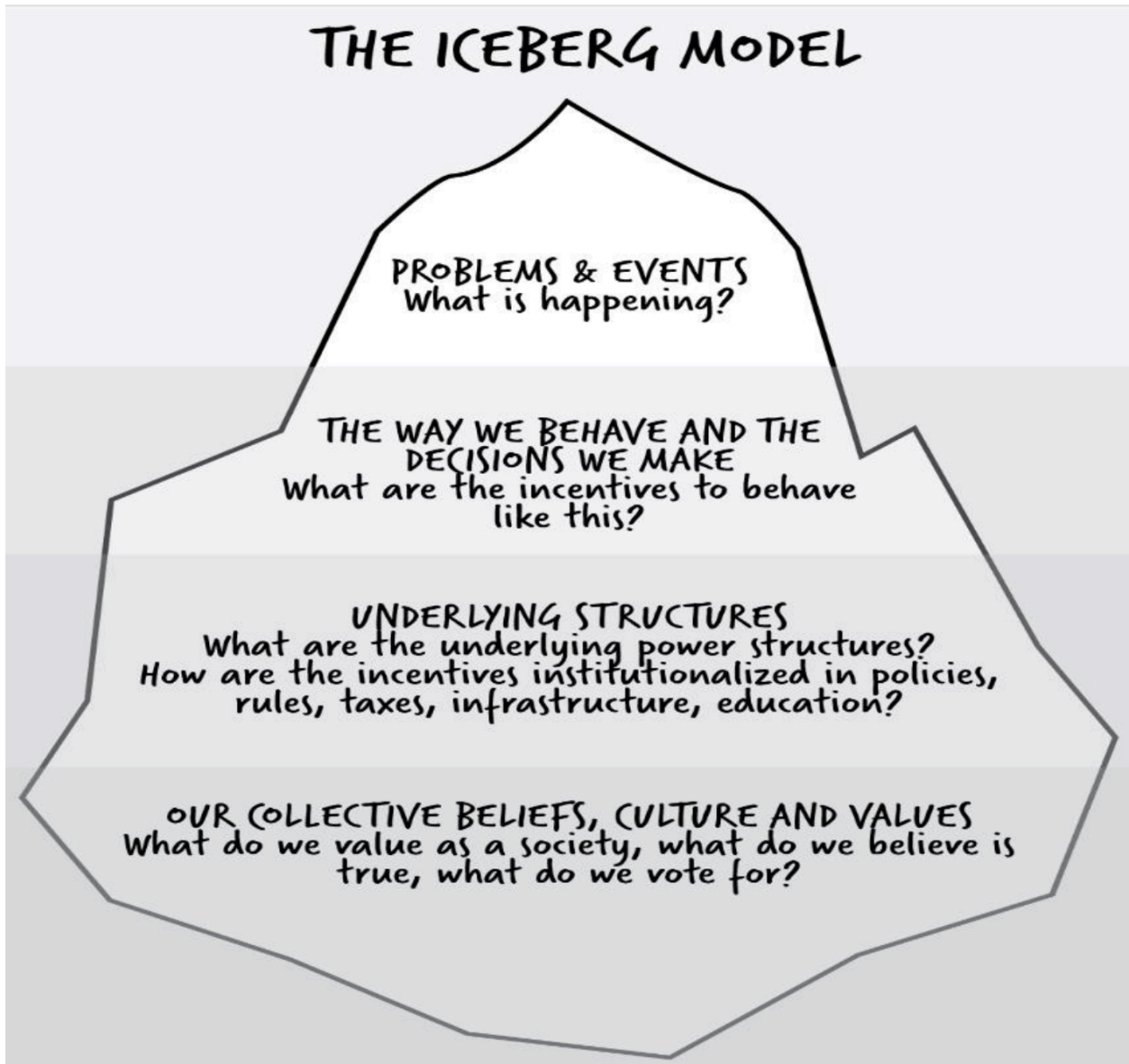


Figure 1. The iceberg model has four levels that are useful to understand the more systemic root causes behind complex problems. Source: Simons, Lucas and André Nijhof. Changing the Game: Sustainable Market Transformation Strategies to Understand and Tackle the Big and Complex Sustainability Challenges of our Generation.

3.1.2. Actors are locked in reinforcing feedback loops, doomed to repeat their collective behavior

A system consists of interconnected, self-optimizing actors whose behaviors influence one another, creating patterns of collective behavior. Because actors (individuals and organizations) often prioritize short-term self-interest, these interactions form reinforcing feedback loops that shape how the system behaves over time.

To understand these dynamics, we must look beyond individual actions and examine the system as a whole by identifying drivers that explain the action-reaction cycle and how all actors consequently interact and influence each other. Interestingly, while all actors contribute to the outcome, none feel fully responsible or empowered to change it. This creates a sense of being “trapped” in the system, and is often reinforced by a “blame game,” where actors point to others as the reason they cannot act, even as they continue to benefit from the status quo.

As a result, systems reward short-term gains while externalizing harm, with benefits accruing to some and consequences borne by others. When actors prioritize self-interest, focus on immediate gains, and shift responsibility elsewhere, the system becomes locked in unsustainable patterns leading to imbalanced systems and outcomes akin to the “tragedy of the commons.” The four-loop model (**Figure 2**) illustrates how these dynamics interact, visualizing (1) how market incentives shape behavior, (2) how the enabling environment reinforces or fails to correct it, (3) how benefits and consequences are unevenly distributed, and (4) how a lack of viable alternatives limits change. Together, these interconnected feedback loops create self-reinforcing patterns that make meaningful system change difficult. Unless we can change that behavior by offering other, more attractive incentives that change the collective behavior, we are destined to keep repeating it.

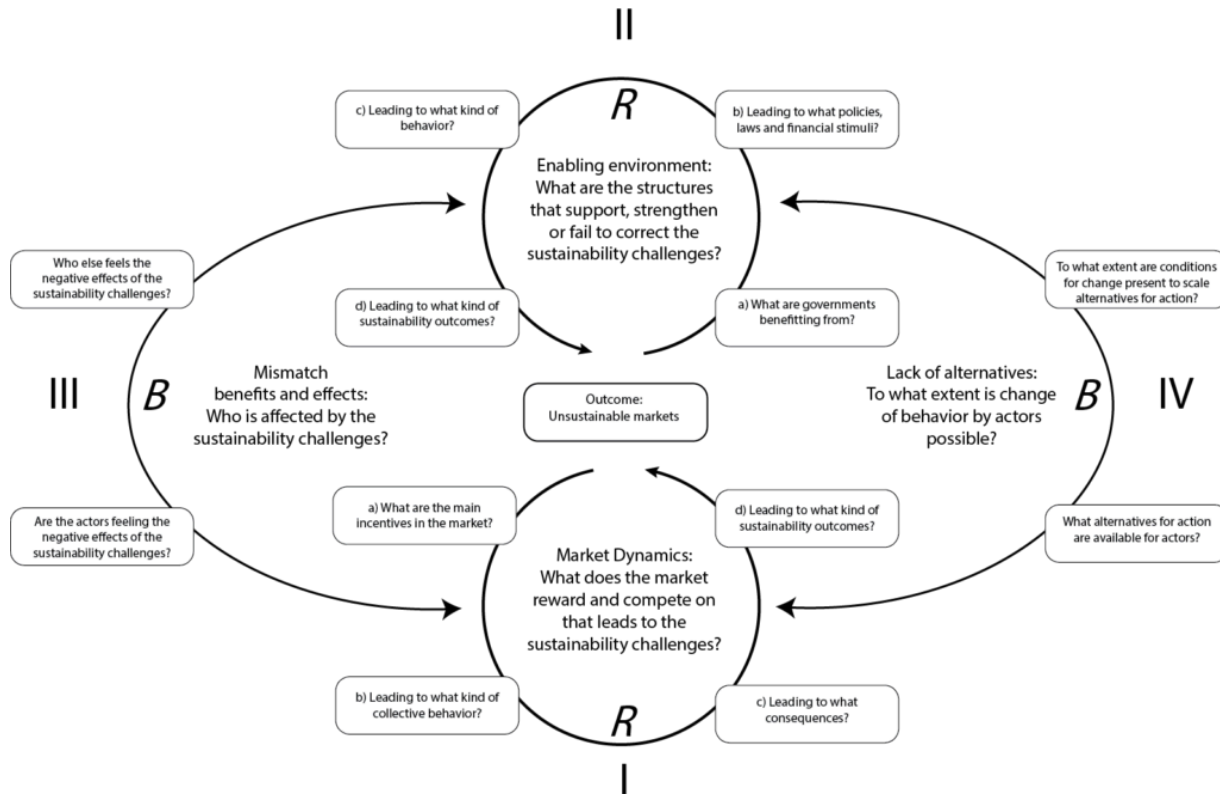


Figure 2. Four-loop model visualizing rules of the game that create unsustainable outcomes, and how a system can get out of balance. Source: Simons, Lucas and André Nijhof. Changing the Game: Sustainable Market Transformation Strategies to Understand and Tackle the Big and Complex Sustainability Challenges of our Generation.

3.2. HOW DO WE MAKE MARKETS MORE SUSTAINABLE?

3.2.1. We need to change the rules of the game

Oftentimes we look at outcomes and try to solve for that, instead of the rules of the game. Making markets more sustainable requires shifting focus from symptoms to the underlying rules and incentives that drive behavior. Rather than relying on isolated projects or assigning blame, sustainable market transformation involves creating viable alternatives and realigning incentives so that responsible behavior becomes the norm over time.

Because these systems are complex, change must be gradual and centrally or well managed to enable actors to adopt new behaviors step by step. Ultimately, transforming markets means influencing collective behavior by making sustainable practices the most

attractive and viable option, especially in contexts where direct regulation is limited. Market transformation is about managing fundamental change over time in the right way, about making actors want to change, one step at a time¹. To understand how this change takes place, we must first understand the maturity phases of changing a system.

3.2.2. The four phases of market transformation

Sustainable market transformation is a gradual, deliberate, and well-managed process that unfolds across four distinct phases of change. Each phase is characterized by specific dynamics, action-reaction patterns, and indicators of progress. Much like human development, from infancy to maturity, markets evolve over time, progressing through stages before reaching a fully institutionalized and stable state (**Figure 3**).

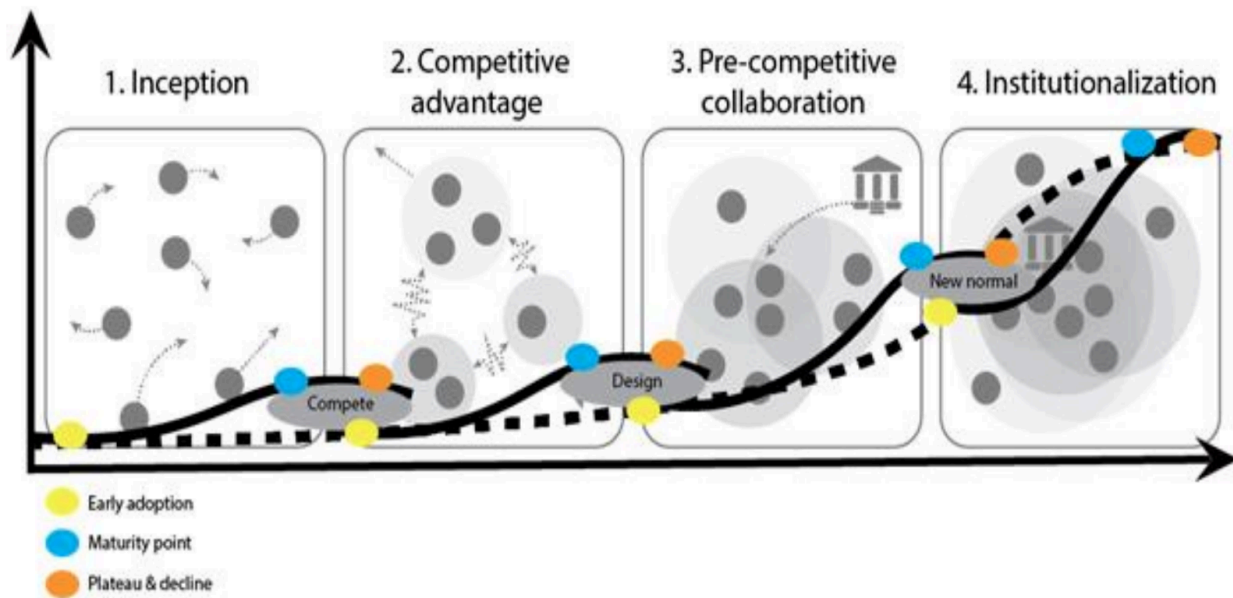


Figure 3. Four phases of sustainable market transformation. Source: Simons, Lucas and André Nijhof. *Changing the Game: Sustainable Market Transformation Strategies to Understand and Tackle the Big and Complex Sustainability Challenges of our Generation*.

3.2.2.1. Phase 0: Inertia

In Phase 0, industries continue business as usual despite known sustainability issues, which are largely ignored or accepted as normal. Most actors are in denial and take a wait-and-see approach, believing problems will resolve over time. Early “rebels” begin to challenge this mindset.

¹ To learn more about the emotional patterns market transformation typically follows and how they evolve through the different phases, refer to [The Psychology of Market Transformation](#).

As the phase progresses, a visible crisis emerges (media attention, protests, reports), making denial harder. Incumbents shift from denial to disbelief, often downplaying the issue or calling for more research to delay action. Meanwhile, frontrunners grow more vocal and urgent, pushing for change as pressure builds.

3.2.2.2. Phase 1: Inception

This crisis creates a short window for change, triggering public scrutiny and pressure on a sector. Companies initially deny responsibility or shift blame, often waiting for attention to fade. Because real change is costly and disruptive, most continue business as usual.

Actors external to the industry in question, like NGOs or unions, play a key role by applying pressure and driving early action in this phase. In response, companies may launch small projects or partnerships, mainly to protect their reputation rather than create real systemic change. Governments also react, but actions are limited and short-term.

These early efforts are mostly symbolic, addressing symptoms rather than root causes. However, they help build awareness, test ideas, and create learning opportunities. Over time, pressure and experimentation begin to shift attitudes from denial to cautious engagement, laying the groundwork for deeper transformation.

3.2.2.3. Phase 2: Competitive advantage

In Phase 2, companies move beyond small projects and begin linking sustainability to their core business, including products, services, and brand value. First movers take risks to create market-facing sustainability offerings, aiming for competitive advantage (reputation, sales, pricing power). This sparks competition, as other companies follow with their own initiatives, labels, and standards to differentiate themselves. Sustainability becomes a battleground for brand and market positioning rather than collaboration. External support (NGOs, government, media) is critical to reward first movers and reinforce momentum. This competition drives innovation and embeds sustainability into business operations.

However, over time, too many competing claims reduce credibility and impact. Costs rise, differentiation weakens, and concerns about greenwashing grow. As consumer interest fades and core problems remain unsolved, companies begin to realize that competition alone isn't enough and that collaboration may be needed next.

3.2.2.4. Phase 3: Pre-competitive collaboration

In Phase 3, leading, like-minded actors come together in a pre-competitive space to collaborate rather than compete. This coalition (businesses, NGOs, researchers) focuses on

shared goals and building trust, while excluding less mature actors that could derail progress.

The focus shifts to developing scalable solutions and creating the right enabling environment, i.e. policies, infrastructure, financing, and standards, to support them. Neutral platforms and facilitators are essential to ensure trust, transparency, and effective cooperation.

This phase is challenging and slow, requiring strong leadership, commitment, and compromise. Over time, trust builds, a shared vision emerges, and collaboration reaches a tipping point, mobilizing broader industry support. Once enough alignment is achieved, the sector becomes ready to change the rules of the game, making sustainability beneficial for all and paving the way for large-scale transformation.

3.2.2.5. Phase 4: Institutionalization

In Phase 4, sustainable practices become the default way of operating in the market. Social and environmental standards are fully embedded into regulations, business practices, and market expectations, making unsustainable behavior economically and socially unviable. Governments play a stronger role through policy and enforcement, while industry, civil society, and other actors are aligned, ensuring that responsible behavior is no longer a competitive advantage, but the norm.

While the four phases describe how market transformation progresses over time, successful movement between phases depends on how different stakeholder groups engage and evolve throughout the process. Different actors, including governments, industry, and civil society play distinct but complementary roles at different stages of transformation.

3.2.3. Stakeholder matrix: roles across phases

The stakeholder matrix (**Figure 4**) highlights that different actors play distinct but complementary roles across each phase of the SMT process. Progress depends on how these roles evolve and align over time.

3.2.3.1. Phase 1: Projects & Pilots

NGOs and frontrunners lead by identifying issues, raising awareness, and testing solutions through pilots. Industry leaders begin experimenting; governments play a limited role.

3.2.3.2. Phase 2: First Movers & Competition

Leading companies start integrating social responsibility into their value propositions, driving broader uptake. NGOs shift toward scaling solutions and building the business case, while industry peers begin to follow. Governments remain mostly passive.

3.2.3.3. Phase 3: Critical Mass

Adoption reaches a tipping point, with industry-wide uptake becoming more common. NGOs focus on accountability and impact, while governments and regulators become more engaged, responding to increased demand for standardization and enforcement.

3.2.3.4. Phase 4: Institutionalization

Governments take a leading role by embedding standards into policy and regulation. Industry fully integrates responsible practices into business operations, and civil society ensures accountability and continuous improvement. Social responsibility becomes the norm across the system.

Overall, successful transformation depends on shifting roles and coordination across stakeholders, with leadership transitioning from NGOs and frontrunners to broader industry adoption and ultimately government-led institutionalization.

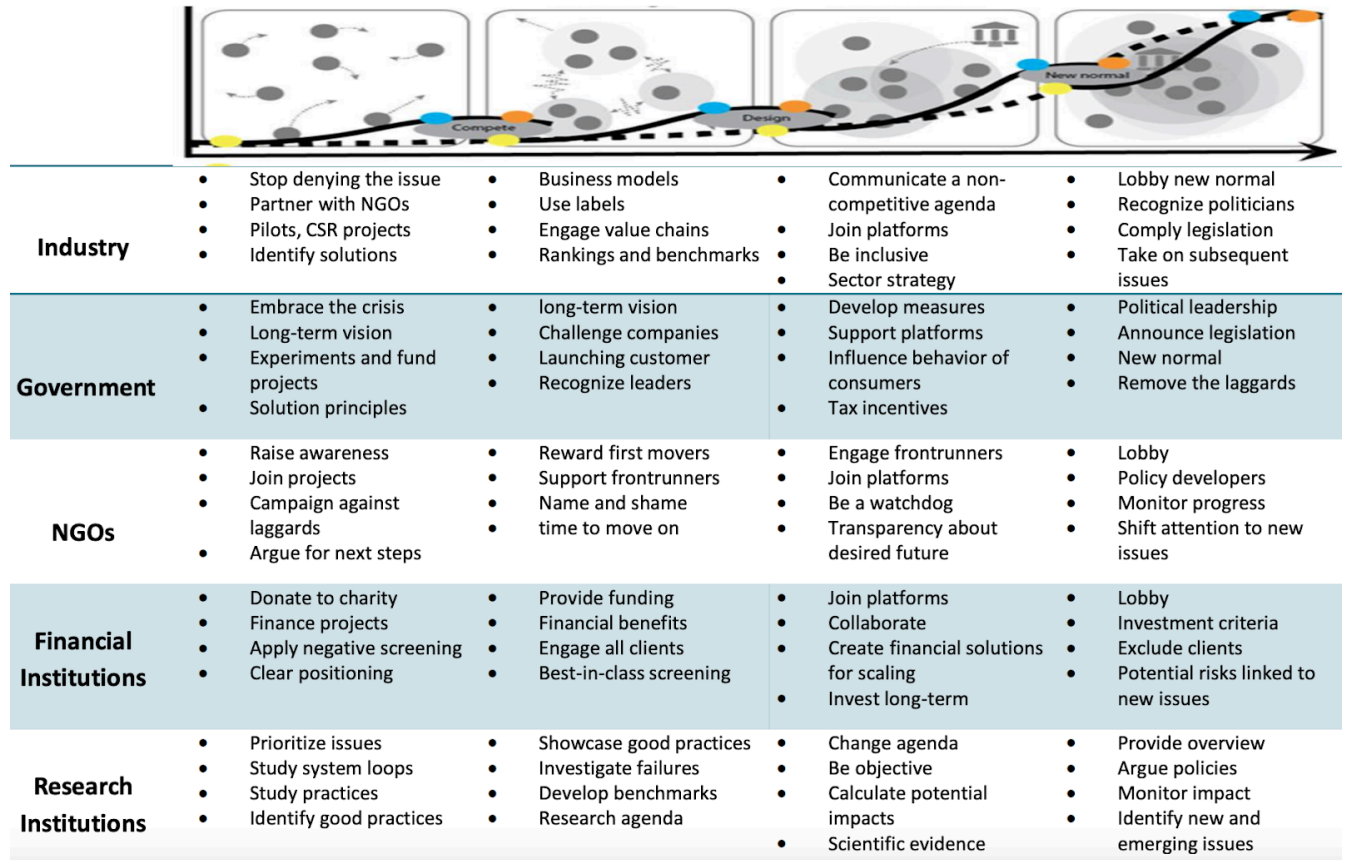


Figure 4. The Stakeholder Matrix: Different roles and instruments needed from different stakeholders during each phase (Phase 1-4 from left to right) for sustainable market transformation. Source: Simons, Lucas and André Nijhof. Changing the Game: Sustainable Market Transformation Strategies to Understand and Tackle the Big and Complex Sustainability Challenges of our Generation.

4. THE SUSTAINABLE MARKET TRANSFORMATION MODEL IN PRACTICE FOR SOCIALLY RESPONSIBLE SEAFOOD

To explore how incentives in the seafood sector can be shifted to drive more socially responsible behavior, we applied the Sustainable Market Transformation (SMT) model described in the previous section. This process enabled us to co-develop a more aligned and effective strategy to accelerate collective progress across the sector.

Through a series of collaborative sessions, we focused on four key activities:

- **Defined the future state (north star):** We developed a shared vision of a future in which social responsibility is fully institutionalized and becomes the norm across the seafood sector. This included both a sector-wide vision and specific roles for key stakeholder groups (industry, government, and civil society). ***This resulted in a clear future state vision for social responsibility in the seafood sector.***
- **Mapped current system dynamics:** We analyzed the seafood sector using systems thinking to understand the incentives, structures, and feedback loops driving current outcomes. This included both market dynamics and the broader enabling environment (government, NGOs, philanthropy). This work revealed why progress has been slow and identified the systemic barriers keeping the sector “stuck.” ***This resulted in a shared understanding of the current system, including key barriers, incentives, and dynamics.***
- **Assessed current initiatives and stakeholders:** We mapped existing social responsibility initiatives and identified the stakeholders involved, clarifying who is currently doing what, and where there are gaps in responsibility or coordination. ***This resulted in a map of existing initiatives and stakeholder roles, as well as clarity around where we are in the SMT process.***
- **Explored pathways for change:** Building on our understanding of the future state and current system, we began identifying high-level strategies to address bottlenecks, shift incentives, and clarify roles needed to drive systemic change. ***This resulted in defining initial strategic priorities for advancing market transformation.***

The key is moving from analysis to action by aligning stakeholders around a shared path forward to accelerate systemic change in the seafood sector. The sections below outline each of these components in greater detail, including our future state vision, analysis of the current system, mapping of initiatives and stakeholders, and strategic priorities.

5. DEVELOPING A FUTURE STATE VISION

A core component of this work was the development of a Future State Vision; a shared, forward-looking picture of what the seafood sector will look like once social responsibility has been fully institutionalized.

5.1. WHAT IS THE FUTURE STATE VISION?

The future state vision is a hypothetical, desired end state of the market. Rather than focusing on specific solutions, it describes what success looks like once transformation has already occurred. It defines the new normal for social responsibility in the seafood sector, thus serving as a target reference point (our “north star”). It imagines how an improved system functions when key challenges have been addressed, and it focuses on outcomes and system conditions, not on specific interventions or goals.

Importantly, the vision answers two central questions:

1. What is the new norm?
2. Who is doing what to ensure this new norm is achieved and sustained?

By establishing a common understanding of what success looks like, the future state vision enables more coordinated, effective action toward achieving systemic change in the seafood sector.

5.2. APPROACH AND FRAMING

The future state vision is developed using a backcasting (“backward from the future”) approach. This means starting with a clearly defined desirable future, then working backward from that future to identify what must happen to get there. Unlike forecasting, which predicts likely outcomes based on current trends, backcasting is normative and goal-oriented; it focuses on what we want to achieve and then determines how to achieve it.

Importantly, the vision intentionally centers on market dynamics. Within the SMT model, markets are the primary lever for change. Because seafood is fundamentally a livelihood and business, economic incentives and consequences must reinforce socially responsible behavior, market structures must align benefits with responsible practices, and long-term participation depends on embedding social responsibility within the logic of the market. This market-centered lens is critical for achieving durable, system-level change.

The future state vision represents Phase 4 of the SMT model: Institutionalization, or the point at which:

- Social responsibility is fully embedded and normalized across the sector.
- The enabling environment supports and reinforces responsible practices.
- The mismatch between who benefits and who bears the costs has been addressed.
- The system operates with greater alignment, balance, and accountability.

In this phase, responsible behavior is no longer driven by external pressure. Rather, it is simply how the market functions. Hence, a new norm has been achieved.

5.3. SOCIALLY RESPONSIBLE SEAFOOD: FUTURE STATE VISION

Table 1 below outlines the Future State Vision for Socially Responsible Seafood, describing what the sector will look like once social responsibility is fully institutionalized. It highlights three core outcomes: respect for human rights and fair labor, widespread adoption of social responsibility as the norm, and equitable competition across the supply chain.

Table 1. Future state vision for a socially responsible seafood sector and roles of key stakeholder groups.

Socially Responsible Seafood: Future State Vision

1. **Human Rights & Fair Labor:** The seafood sector is a global force for good, one where the human rights and fair labor of employees and local communities are respected, prioritized, and actively advanced. Fishers and workers throughout the supply chain are treated and paid fairly.
2. **Social Responsibility:** A critical mass of better social responsibility practices has been achieved. A critical mass of stakeholders from across industry, civil society, and government are aligned on key practices and outcomes perceived as the 'new normal' by companies, consumers, and policymakers. Systems to prevent and mitigate/remediate labor abuses are both present and expected practices throughout the seafood industry, and are integrated into business operations. Good behavior is made visible, while businesses responsible for violations are held accountable.
3. **Equitable Competition:** A level playing field for all supply chain actors, including independent small-scale fishers and communities, has been achieved through legislation and coercive self-regulation. Supply chain actors are aligned in actively lobbying for institutionalization and government implementation and enforcement of human rights and labor policies.



GOVERNMENTS	INDUSTRY	CIVIL SOCIETY
<ul style="list-style-type: none"> · Fulfill the role of national neutral convener within the seafood sector and across other sectors. · Facilitate market stakeholder alignment through seafood social compliance policies that are on seafood social compliance is evidence-based and data-driven. · Political leadership is strong. Soft norms have been turned into concrete laws, leveling the playing field and forcing even the laggards to change behavior. · Direct funding is provided to develop and enforce compliance mechanisms. · Strong and equitable inter-governmental collaboration exists. Responsibilities are shared in ways that fairly distribute the burdens of enforcement across wealthy and developing country governments. 	<ul style="list-style-type: none"> · Market actors work in a coordinated manner toward mitigating systemic human and labor rights issues, replacing competition with pre-competitive collaboration. Social responsibility initiatives are aligned. · Costs associated with sustainable and responsible practices are seen as part of the cost of doing business (i.e., these costs are baked into purchasing decisions and buying practices), no longer a side-funded effort or costs to cascade to others. Companies demand greater transparency from value chain actors and make purchasing practices conditional on social conditions. · Recognized frameworks and principles that balance profit with people and planet are the norm (e.g., B-Corps, UN Global Compact, certification standards, etc.). · A critical mass of workers is covered by self-governed, self-led protective mechanisms that serve as an adequate counterbalance to employer power (e.g., unions establishing collective bargaining agreements, self-driven co-ops, etc.). 	<ul style="list-style-type: none"> · Civil society operates as a backbone to support and drive collective action. · Support frontrunners and create accountability for laggards. · Civil society, workers' movement, and community-based organizations share their knowledge in multi-stakeholder initiatives and scale their impact. · Acknowledgement that different approaches can play complementary roles in achieving a shared vision. Willingness to share knowledge and work/partner with organizations that have different approaches from their own.

The table illustrates the distinct but complementary roles of key stakeholder groups (governments, industry, and civil society) in achieving and sustaining this vision, emphasizing coordinated action, shared responsibility, and system-wide alignment.

Governments play a central role as neutral conveners, policy-makers, and enforcers, translating social responsibility norms into clear, evidence-based policies, laws, and funding mechanisms that align stakeholders and level the playing field. Political leadership is crucial, as choices will have to be made that will hurt the leggards (i.e., those who are not acting accordingly feel the consequences). This can take the form of financial or legal pending penalties, forced compliance, or revocation of permits. Through strong political leadership and international collaboration, they create an enabling environment that institutionalizes expectations, supports compliance, and drives lasting, system-wide change. One example from agriculture is the adoption of organic certification. This started as a voluntary sustainability standard, but countries like the US, the EU, Canada and Japan have comprehensive organic standards which are formulated and overseen by the government. As a consequence, the term organic may be used only by certified producers creating an enabling environment that stimulates trust in this standard.

Industry actors collaborate to address systemic human rights issues, shifting from competition to coordinated, pre-competitive action. Social responsibility is embedded in core business practices, with its costs integrated into pricing. Companies drive accountability by requiring transparency and tying purchasing decisions to social performance.

Civil society plays a key role in driving collective action by convening stakeholders, sharing knowledge, advocating for policy change, and holding actors accountable, while also reducing worker vulnerability and exposing harmful practices. By fostering collaboration across diverse actors and approaches, harmonizing standards, and partnering with governments and other actors, this stakeholder group helps align efforts, scale impact, and ensure continued momentum toward shared goals. One example from agriculture is the Equitable Food Initiative (EFI), which brought together a diverse group of stakeholders to collaborate on continuous improvement, inclusion of worker voice, and rigorous standards developed through multi-stakeholder participation in order to address the industry's most pressing issues including labor, sustainability and food safety.

The sector-level future state represents the culmination of coordinated action across stakeholders, where individual roles and efforts combine to create a fully transformed

seafood system. In this future state, social responsibility is fully institutionalized across the seafood sector, with human rights and fair labor upheld and embedded as the norm in market systems, business practices, and regulatory frameworks, with strong accountability mechanisms in place. A critical mass of aligned stakeholders across industry, government, and civil society collaborate to enforce accountability, ensure a level playing field, and sustain systemic change through coordinated incentives and strong governance.

Two annexes provide additional detail to complement the future state vision and reflect key insights from our discussions. **Annex I** addresses the complexity of broadly defined stakeholder groups. While the main vision outlines roles at the level of governments, industry, and civil society, this annex breaks these categories down into more specific sub-groups such as export vs. import governments, different segments of industry (e.g., fishers, processors, retailers), and diverse civil society actors (e.g., NGOs, philanthropy, consumers). This allows for a more nuanced understanding of the distinct roles and responsibilities required to achieve and sustain the future state. **Annex II** captures a range of more solutions-oriented ideas that emerged during discussions. While the future state vision is intentionally focused on describing the desired end state, rather than the solutions to get there, this annex preserves those ideas for future use. It ensures that emerging strategies and potential interventions are documented and can be revisited as we move into the strategy development phase.

This future state vision served as a guiding north star for the rest of this work, enabling us to better define a market transformation pathway, from current conditions to a fully institutionalized system, beginning with understanding current system dynamics and barriers.

6. MAPPING THE CURRENT SYSTEM LOOPS

To identify pathways for change, we first sought to understand why the seafood sector continues to produce unsustainable outcomes, particularly with respect to human rights and labor abuses. This required examining the incentives, structures, and system dynamics that shape collective behavior.

6.1. SYSTEMS ANALYSIS AND THE FOUR LOOP MODEL

Recalling our definition of a system from section 3, a system is a network of interconnected, self-optimizing actors whose behaviors influence one another, creating patterns of collective behavior that cannot be understood in isolation. Because actors often prioritize short-term self-interest, systems can become imbalanced, reinforcing outcomes where no single actor feels responsible or empowered to change the result, even when those outcomes are harmful.

To better understand these dynamics, we used the four-loop model (Simons & Nijhof) introduced in section 3, which visualizes the “rules of the game” that drive unsustainable outcomes. This model examines how (1) market incentives shape behavior, (2) the enabling environment reinforces or fails to correct it, (3) the benefits and consequences are unevenly distributed, and (4) viable alternatives are lacking. The model illustrates these interactions in a series of loops:

- A system loop represents a chain of cause-and-effect relationships.
- Reinforcing loops (R) amplify change over time (e.g., incentives that accelerate unsustainable practices).
- Balancing loops (B) stabilize the system.

It is the interaction of these four loops, not any one in isolation, that locks the system into persistent, self-reinforcing patterns and makes meaningful change difficult.

6.2. APPLYING THE FOUR LOOP MODEL TO SOCIALLY RESPONSIBLE SEAFOOD

We analyzed the seafood sector as a system shaped by interconnected actors, incentives, and feedback loops that drive collective behavior and reinforce current outcomes. Using the four-loop model, we examined how all four loops interact to sustain unsustainable outcomes in social responsibility in seafood (**Figure 5**).



Figure 5. The system loops that lead to unsustainable social responsibility in the seafood sector. A mural board containing this figure can be found [here](#).

6.2.1. Loop I: Market dynamics

Cheap seafood depends on cheap labor. In the seafood sector, buyers and retailers prioritize low prices and high volumes, pushing cost pressures down the supply chain. This drives intense competition to produce as cheaply as possible, leading to collective behaviors such as maximizing production and reducing labor costs, often through low wages, unsafe conditions, or informality. These dynamics result in the externalization of negative impacts, where short-term gains are prioritized while the consequences, particularly human rights and labor abuses, are borne by vulnerable workers. In turn, low prices reinforce the same purchasing behavior, creating a self-perpetuating cycle with little incentive for change.

6.2.2. Loop II: Enabling environment

Fragmented, short-term, and largely voluntary approaches fail to shift underlying incentives. The enabling environment, comprising of governments, NGOs, and funders, tends to reinforce rather than correct unsustainable market dynamics in seafood. Governments prioritize economic gains such as exports, jobs, tax revenue, and competitiveness, often in the absence of binding social standards, with labor and human rights falling between policy silos. Weak regulation, particularly on the high seas, combined with harmful subsidies and the outsourcing of responsibility to voluntary initiatives, further entrenches low-cost production models.

At the same time, NGOs and funders are driven by short-term, project-based incentives that favor visibility and competition over collaboration, resulting in fragmented efforts that create the appearance of action without shifting underlying incentives. This leads to fragmented, self-interested actions that contribute to inefficiencies, duplication, and confusion, ultimately slowing progress and reinforcing the same conditions that allow labor exploitation and unsustainable practices to persist. In other words, stakeholders that are meant to drive progress toward a more socially responsible sector are, in fact, slowing forward movement, thereby generating confusion among market actors who look to these stakeholders for guidance.

6.2.3. Loop III: Mismatch of benefits and effects

The most affected actors have the least power to change the system. The benefits of the status quo are concentrated among powerful upstream actors, while the negative consequences, particularly poor labor conditions, are borne by fishers, workers, and other vulnerable communities. In many cases, these workers lack freedom of association and collective power, and are often migrant, informal, indebted, or dependent on recruiters.

Fear of retaliation, combined with weak or inaccessible grievance mechanisms and disproportionate employer control over wages and conditions, further limits their ability to advocate for change. As a result, those who benefit continue to externalize impacts to those with the least power and visibility, who are often at great geographic and political distance, thereby reducing accountability and perpetuating unsustainable practices.

6.2.4. Loop IV: Lack of alternatives

Fragmented projects create activity, not transformation. Viable alternatives to current practices remain limited, fragmented, or insufficiently attractive within existing market incentives. NGOs often respond to abuses by launching new pilots and initiatives, but these efforts remain temporary, poorly aligned, and rarely scaled. Funders tend to reward visibility and novelty over consolidation, leading NGOs to compete rather than coordinate. As a result, the market experiences confusion and inaction, with actors facing few compelling pathways to change and systemic transformation remaining out of reach.

6.2.5. Bringing the system together

Taken together, these four loops reveal a system that is structurally designed to continually produce unsustainable outcomes in the seafood sector. Market dynamics reward low cost and high volume, while the enabling environment reinforces these incentives rather than correcting them. At the same time, the negative consequences are externalized to the least powerful actors, and viable alternatives remain limited or unattractive. These dynamics interact to create a self-reinforcing cycle in which actors, responding rationally to existing incentives, collectively drive outcomes that no single actor intends or controls. Most actors benefit from the current system or face no immediate consequences for maintaining it, while those most affected lack the power to influence change. As a result, the sector becomes locked into a “race to the bottom,” where unsustainable practices are not the exception, but the logical outcome of how the system is structured.

Understanding these interconnected loops helps explain why progress has been slow and why isolated interventions have struggled to gain traction. It also highlights that meaningful change will require coordinated, system-level shifts across incentives, accountability, and available alternatives.

With this systems-level understanding in place, we now turn to the current landscape of social responsibility initiatives to examine what is being done, by whom, and where opportunities exist to better align efforts and accelerate change.

7. DETERMINING THE MATURITY OF CURRENT INITIATIVES AND DEFINING THE STAKEHOLDER MATRIX

To understand where the seafood sector stands in its journey toward social responsibility, we mapped the evolution and maturity of existing initiatives using the Sustainable Market Transformation (SMT) framework. This exercise aimed to assess how efforts have developed over time, identify key actors involved, and determine the current phase of market transformation.

7.1. MAPPING CURRENT SOCIAL RESPONSIBILITY INITIATIVES IN THE SEAFOOD SECTOR

7.1.1. Purpose and Approach

To understand how far the seafood sector has progressed toward the future state vision, we assessed the maturity of current social responsibility initiatives according to the SMT framework. Here, “maturity” refers to the extent to which initiatives are contributing to system-level change, i.e., moving the sector toward a state where responsible practices are the norm (as opposed to whether they have met project-level outputs, which is a common metric in NGO/funder circles). To assess the maturity of initiatives, we looked at scale and impact.

“Scale” refers to the extent of uptake and adoption of social responsibility initiatives across the seafood sector, i.e., how widely practices, tools, or standards are implemented among companies, supply chains, geographies, and production volumes. It reflects the breadth of market penetration, but does not on its own indicate whether these initiatives are driving meaningful improvements for fishers and workers. Importantly, scale does not equal impact: some initiatives may be widely adopted across the market, but the impact metrics do not match the expansion. As such, we are defining “impact” as measurable improvements in the lived experiences of fishers and workers, including stronger protection of human and labor rights, safer and more equitable working conditions, and effective systems to prevent, identify, and remediate abuses. This includes outcomes such as fair wages, freedom of association, reduced instances of forced and child labor, accessible grievance mechanisms, and demonstrable changes in employer practices, rather than simply the adoption of tools, policies, or participation in initiatives.

We grounded this analysis in the SMT phases, which track the evolution from early pilots (Phase 1) to mainstream adoption (Phase 2), critical mass (Phase 3), and ultimately institutionalization (Phase 4). By mapping initiatives along this progression, we aimed to understand where the sector currently sits and how close it is to achieving a future in which

human rights, fair labor, and effective systems for preventing and remediating abuses are fully embedded across the seafood supply chain.

7.1.2. The initiatives

Figure 6 provides an overview of existing social responsibility initiatives in the seafood sector over the past decade, beginning with the 2014 crisis, when widely publicized reports of forced labor in the Thai shrimp industry catalyzed initial action and marked the start of Phase 1. Prior to this, the sector operated largely under a “business as usual” model, with a near-exclusive focus on environmental sustainability and limited attention to labor and human rights. While many initiatives have since emerged, including certifications, Social FIPs, NGO-developed tools, worker engagement mechanisms, tech pilots, responsible recruitment efforts, and regulatory frameworks, the underlying incentives driving the system have remained largely unchanged, and continue to shape current outcomes. Importantly, this figure is not exhaustive, but rather illustrates key patterns of activity, and we welcome additions of any important initiatives not captured.

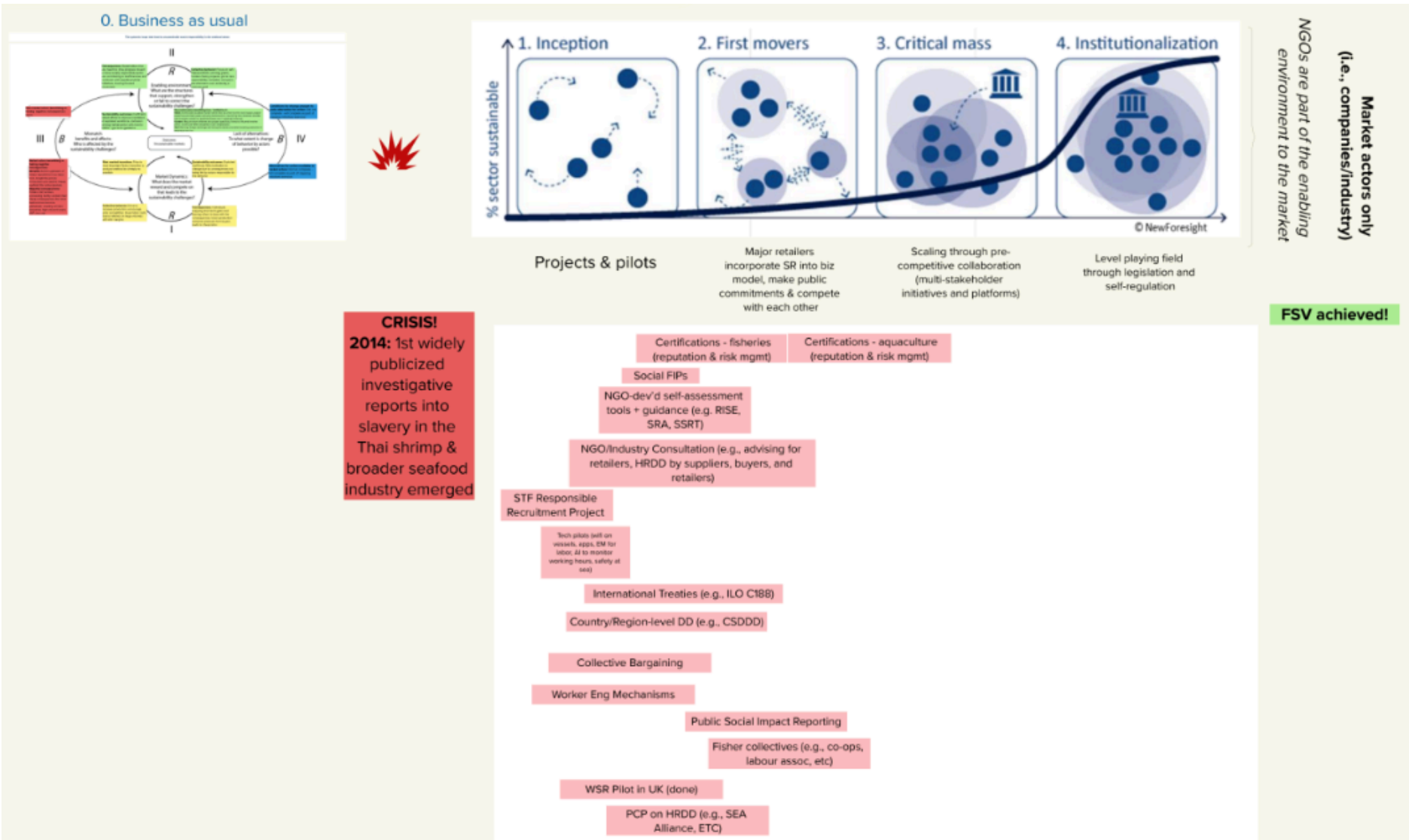


Figure 6. Current social responsibility initiatives in the seafood sector, mapped according to maturity (based on overall adoption by the sector). A mural board containing this figure can be found [here](#).

Seafood certifications are voluntary standards that verify fisheries and aquaculture operations meet defined environmental and social criteria, including labor rights, worker safety, and fair wages, and use third-party audits to assess compliance. They contribute to social responsibility by setting expectations for acceptable labor and human rights practices, improving transparency, creating market incentives (e.g., access to buyers, price premiums, preferred sourcing) for better practices, and providing mechanisms for monitoring and, in some cases, remediation. Key examples include Fair Trade USA (strong focus on worker rights, community development funds, and fisher empowerment) and ASC (includes labor standards alongside environmental criteria). While certification uptake is significant in major export markets and among large-scale producers, coverage remains limited, particularly for small-scale and informal actors. Certifications have helped improve working conditions and raise awareness of labor issues, but their impact is variable and limited in scale.

Social Fishery Improvement Projects (Social FIPs) are multi-stakeholder initiatives, modeled after environmental FIPs, that aim to improve labor and human rights conditions in fisheries by identifying risks and implementing targeted improvements over time. Often led by NGOs (e.g., FishWise, SFP, WWF) with support from select industry partners, they help raise awareness, pilot solutions, and increase accountability in high-risk supply chains. Social FIPs are still emerging and relatively limited in scale compared to environmental FIPs or certifications. Uptake is concentrated in select fisheries and supply chains, often those linked to major international buyers. Participation is typically driven by NGOs and supported by a subset of committed companies, rather than widespread industry adoption.

NGO-developed self-assessment tools and guidance frameworks, e.g., RISE (Rapid Improvement for Social Engagement), SRA (Social Responsibility Assessment Tool), SSRT (Seafood Slavery Risk Tool), are resources designed to help seafood companies and supply chain actors identify, assess, and manage social responsibility risks, particularly related to labor and human rights. These tools are typically voluntary and provide structured methodologies for companies to evaluate their practices and prioritize improvements. They play an important role in raising awareness of labor and human rights risks within operations and supply chains, providing practical guidance and benchmarks for responsible practices, and enabling companies to self-diagnose gaps and take initial steps toward improvement. These tools are widely used as entry points, particularly by companies beginning their social responsibility journey or responding to buyer requirements. However, uptake is often inconsistent and non-standardized, with different

companies using different tools, leading to fragmentation across the sector. Because they rely on self-assessment and voluntary action, they do not guarantee behavior change or improved conditions on their own. Their effectiveness depends on how seriously companies act on findings and whether they are paired with stronger accountability mechanisms. Thus, their impact on fishers and workers is generally indirect and variable.

NGO consultation refers to advisory and technical support provided by NGOs and experts to companies (e.g., retailers, brands, suppliers) to help them implement social responsibility practices; namely, identify, manage, and mitigate human rights and labor risks, often through implementing human rights due diligence (HRDD). Examples include advisory support from organizations such as FishWise and Issara Institute, and is often focused on risk assessments, supplier engagement, and corrective action planning. Widely used by leading retailers and brands, particularly in North America and Europe, it helps build internal capacity, as well as influence sourcing practices and supply chain oversight. However, uptake remains limited among upstream actors in the supply chain. While it can improve transparency and company behavior, its impact on fishers and workers is often indirect and uneven, relying on voluntary implementation rather than systemic change.

The Seafood Task Force (STF) Responsible Recruitment Project is an industry-led, NGO-supported collaborative initiative that promotes fair and transparent hiring practices, particularly by eliminating worker-paid recruitment fees and improving protections for migrant workers. The project is overseen by the Seafood Task Force (STF), a global industry association made up of 50+ major retailers, brands, food service companies, and supply chain partners. It aims to ensure that workers are recruited fairly, without paying fees or being subjected to coercion or deception. Examples of activities include training seafood companies and recruitment agencies on responsible recruitment standards, engaging suppliers in key sourcing countries (e.g., Thailand) to improve hiring practices, and collaborating with NGOs and experts (e.g., Verité, The Fair Hiring Initiative) to implement and verify practices. While it has gained traction among major seafood companies (particularly in high-risk supply chains like shrimp and tuna), its overall impact remains limited by partial uptake and reliance on voluntary implementation.

Tech pilots such as Wi-Fi on vessels, mobile apps for worker communication, electronic monitoring (EM) systems, and AI-based tools are technology-driven initiatives aimed at improving transparency, communication, and oversight of labor conditions in seafood supply chains. Examples include: Satlink and Pelagic Data Systems (connectivity and monitoring at sea), EM systems adapted for labor monitoring (e.g., camera-based

observation), and worker voice and reporting apps developed by NGOs and tech providers. While they show promise in increasing visibility into working conditions (particularly in remote, high-risk environments like vessels) and enabling worker voice (e.g. real-time communication and grievance reporting), uptake remains limited and largely pilot-based. As a result, their impact on fishers and workers is still uneven and depends on broader integration with enforcement, accountability, and market incentives.

International treaties and country/region-level due diligence regulations establish legal frameworks that set labor standards and require companies to address human rights risks and uphold labor protections in seafood supply chains. They create accountability mechanisms through enforcement, reporting, and potential penalties while leveling the playing field by making responsible practices mandatory, not voluntary. Examples include: (1) ILO Convention 188 (Work in Fishing Convention), which sets labor standards for fishers, including contracts, safety, and working conditions; (2) EU Corporate Sustainability Due Diligence Directive (CSDDD), which requires companies to conduct HRDD across their value chains; and (3) EU Forced Labor Regulation, UFLPA (U.S.), and other import controls targeting forced labor. While they have broad and growing reach, especially in major markets like the EU and U.S., their adoption and enforcement vary significantly by country, and many regions with high labor risk have limited implementation or capacity. Further, their impact on fishers and workers is patchy due to gaps in enforcement, coverage (e.g. high seas, informal or small-scale actors), and implementation, though they are critical for driving system-wide accountability and change.

Worker engagement mechanisms are tools and processes that enable fishers and workers to voice concerns, provide feedback, and participate in decisions affecting their working conditions. These mechanisms are essential for ensuring that workers are not just passive recipients of standards, but active participants in shaping and monitoring them. Examples include worker hotlines and grievance mechanisms (e.g., Issara Institute's worker voice systems), worker committees and representation structures in processing facilities, and mobile apps and digital platforms for anonymous reporting and feedback. Worker engagement mechanisms can have a direct impact by increasing transparency, strengthening accountability, enabling remediation when effectively implemented, and, most importantly, empowering workers with voice and agency. When effective, these mechanisms can have a direct and meaningful impact, enabling workers to report abuse, access remediation, and improve conditions. However, impact varies depending on trust, accessibility, and follow-through, and remains limited where systems are not fully integrated or lack enforcement.

One particularly strong and impactful worker engagement mechanism is **collective bargaining**; a structured, legally recognized process where workers, typically through unions, negotiate binding agreements with employers on wages, conditions, and rights. While most worker engagement mechanisms are informal or advisory, collective bargaining is formal, negotiated, and enforceable. Examples of collective bargaining include fisher unions and cooperatives negotiating terms in small-scale fisheries, collective bargaining agreements (CBAs) in seafood processing facilities, and worker-led organizations in regions such as Thailand, Indonesia, and parts of Latin America. Uptake is limited, especially among migrant and informal workers, with coverage being higher in certain countries with stronger labor laws while remaining low in many high-risk regions. Where it exists, collective bargaining has a strong and direct impact, improving wages, safety, and overall working conditions. However, its reach is constrained by barriers such as lack of freedom of association, weak enforcement, and power imbalances, meaning many workers in seafood remain excluded from these benefits.

Public social impact reporting refers to the practice of companies, NGOs, or multi-stakeholder initiatives publicly disclosing information about their social responsibility performance and impacts, particularly related to labor and human rights. While public reporting is increasingly adopted by major companies through sustainability and ESG reports, most of this reporting includes policies and commitments (e.g., human rights policies, codes of conduct) and, to a much lesser extent, risk assessments, findings from audits or assessments, and outcomes and impact metrics (e.g., number of workers reached, grievances resolved). This is, in part, due to public reporting frequently being driven by reputational and market pressure rather than deep accountability. As such, reports are partial, non-standardized (reporting frameworks allow flexibility, meaning companies can select what to report), and focused more on commitments than outcomes (most fall short on explaining how they address human rights risks). While public reporting may improve visibility and accountability, its direct impact on fishers and workers is often limited, as reporting does not always translate into concrete changes on the ground without stronger enforcement and follow-through. In short: it's a transparency tool that can drive accountability, but on its own it does not guarantee improved labor conditions.

The **Worker-Driven Social Responsibility (WSR) pilot in the UK** is an early-stage, worker-led initiative that uses binding agreements and buyer pressure to improve labor conditions in the fishing sector. It is a two-year pilot program (launched in 2024) that applies the WSR model, which was previously successful in agriculture and apparel, to the UK fishing

industry, and is designed to tackle labor abuses (especially those affecting migrant fishers) by shifting power toward workers and using market pressure to enforce better conditions. While there is potential for direct, on-the-ground impact by empowering workers and enforcing accountability, uptake remains very limited and localized. The pilot is still relatively recent, and comprehensive findings on long-term impact and scalability are not yet publicly established.

Pre-competitive platforms on human rights due diligence (HRDD) are collaborative initiatives where companies, NGOs, and other stakeholders work together before competition kicks in to address shared labor and human rights risks in supply chains. They help reduce fragmentation and create consistency, with the ultimate goal being to tackle systemic issues collectively that no single actor can solve alone. Examples include Seafood Ethics Action Alliance (SEA Alliance) (brings together companies and NGOs to align on human rights expectations in seafood supply chains, Ethical Trading Initiative (ETI) (cross-sector platform that informs seafood social responsibility, supporting companies on labor rights and due diligence through guidance, research, and cross-sector learning), and models worth exploring from other sectors (e.g. Sustainable Apparel Coalition). Participation in these platforms is typically limited to frontrunners and impact is often indirect, relying on broader uptake and implementation (i.e. translation into company action) to drive real change.

Looking at these social responsibility initiatives as a whole, we see that most are led by NGOs or NGO–industry collaborations, with industry typically participating as passive or selective adopters rather than drivers of change. Governments play a more limited and inconsistent role, primarily through emerging regulations. Across these initiatives, overall uptake in the market remains partial and fragmented, often concentrated among frontrunners and specific supply chains (e.g. tuna, shrimp). While some mechanisms (e.g. worker engagement systems, collective bargaining, and responsible recruitment efforts) demonstrate potential for direct impact, most interventions have indirect, variable, or localized effects on fishers and workers due to their voluntary nature, limited scale, and inconsistent implementation.

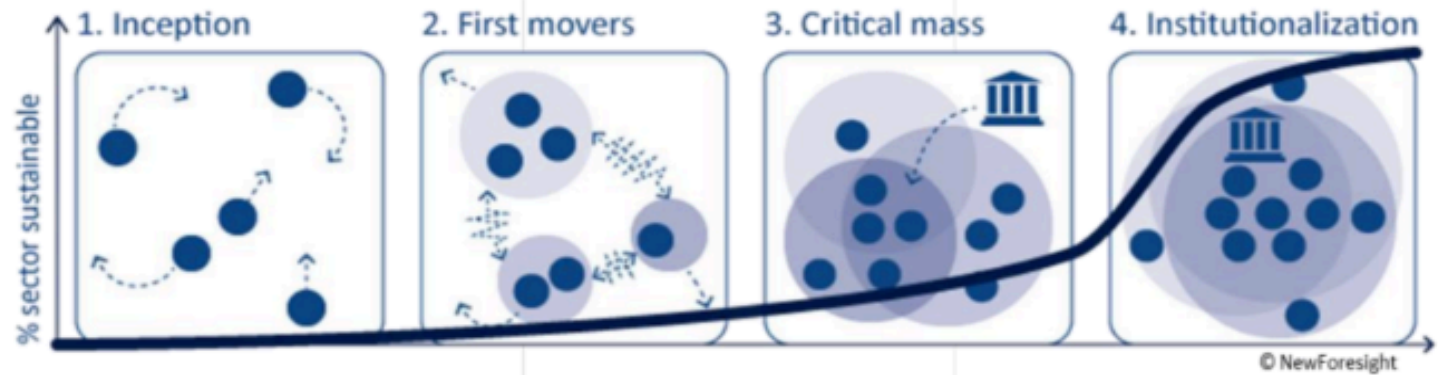
While this analysis provides a clearer picture of where the sector currently stands, it also highlights a critical gap: who needs to do what to move the system forward. Understanding the maturity of initiatives is only one part of the equation; progress depends on how different stakeholder groups step into their roles at the right time and in the right way. To address this, the next section outlines the distinct and evolving roles of industry, civil

society, and governments across each phase of the SMT model in a stakeholder matrix. This framework helps clarify how coordinated action across stakeholders can accelerate the transition from fragmented efforts toward sector-wide adoption of social responsibility.

7.2. THE STAKEHOLDER MATRIX

Building on the mapping of current initiatives, we used the stakeholder matrix to define the roles of key stakeholder groups, including industry, civil society, and governments, across each phase of the SMT model, with the goal of identifying what actions are needed to advance the seafood sector toward widespread adoption of social responsibility (**Figure 7**). Through this exercise, we compared what stakeholders are currently doing (blue) with what they should be doing (green) according to the SMT framework, highlighting gaps, misalignments, and opportunities for greater impact. This helped us assess how existing initiatives align with the roles required in the current phase, where momentum exists, and where shifts in behavior or strategy are needed to progress.

We placed particular emphasis on civil society given its central role in leading many current initiatives, as well as the fact that NGOs and funders comprised the primary stakeholder group participating in the workshop series. This created space for honest reflection on how NGO-driven efforts, while critical, may also be contributing to fragmentation, inefficiencies, and confusion in the market due to a proliferation of projects and competition for funding.



	1. Inception	2. First movers	3. Critical mass	4. Institutionalization	
GOVERNMENTS	<p>What they should be doing</p> <ul style="list-style-type: none"> Embrace the crisis Communicate a long-term vision Make space for experiments and fund projects Identify solution principles 	<p>What they are currently doing</p> <ul style="list-style-type: none"> Look through your own eyes and see what you can do Recognize the need for a long-term vision Develop a shared vision and communicate it 	<p>What they should be doing</p> <ul style="list-style-type: none"> Emphasize long-term vision Challenge market actors on principles Be a launching customer Recognize market leaders 	<p>What they are currently doing</p> <ul style="list-style-type: none"> Develop policy goals and measures Support platforms and coalitions Influence behavior of customers Change tax incentives 	<p>What they should be doing</p> <ul style="list-style-type: none"> Show political leadership Announce legislation Create the new normal Remove the laggards
INDUSTRY	<p>What they should be doing</p> <ul style="list-style-type: none"> Stop denying issue Partner with NGOs/ other stakeholders Pilot, CSR projects, support or partner with foundations Identify solution principles 	<p>What they are currently doing</p> <ul style="list-style-type: none"> Communicate the need for a long-term vision Develop a shared vision and communicate it Develop a shared vision and communicate it 	<p>What they should be doing</p> <ul style="list-style-type: none"> Develop sustainable business models Differentiate by introducing new business models and labels Engage value chains Participate in rankings and benchmarks 	<p>What they are currently doing</p> <ul style="list-style-type: none"> Communicate a non-competitive agenda Form or join platforms Be inclusive when others want to join Develop a sector strategy 	<p>What they should be doing</p> <ul style="list-style-type: none"> Lobby for a new normal Recognize leading politicians Comply with legislation Take on subsequent issues
CIVIL SOCIETY	<p>What they should be doing</p> <ul style="list-style-type: none"> Raise awareness about the crisis Be involved in projects Campaign against laggards Set agenda for the next steps 	<p>What they are currently doing</p> <ul style="list-style-type: none"> Calling out bad actors (business) Communicate the need for a long-term vision Develop a shared vision and communicate it 	<p>What they should be doing</p> <ul style="list-style-type: none"> Reward first movers Support pro-active corporate strategies Name and shame the laggards Emphasize that it is time to move on 	<p>What they are currently doing</p> <ul style="list-style-type: none"> Support frontrunners, pressure laggards Join platforms Be a watchdog Create transparency about the desired future 	<p>What they should be doing</p> <ul style="list-style-type: none"> Lobby the government Communicate with policy developers Monitor progress Shift attention to new issues

Figure 7. Stakeholder matrix outlining what each group is currently doing (blue) and what they should be doing instead (green) by SMT phase to best support progression of widespread social responsibility uptake in the seafood sector. A mural board containing this table can be found [here](#).

In Phase 1, **governments** should play an active enabling role by embracing the crisis as a catalyst for change, clearly communicating a long-term vision for social responsibility, creating space for experimentation, funding and supporting pilot initiatives, and identifying core solution principles to guide early efforts. These actions are critical to legitimizing the issue, aligning stakeholders, and laying the foundation for scaling in later phases.

In practice, however, governments are largely falling short of this role. Engagement is intermittent and does not translate into sustained leadership or direction. Instead of proactively shaping the agenda, many governments lack a clear long-term vision, do not consistently fund or support initiatives, and rely heavily on NGOs and international donors to drive progress.

Across the SMT phases, **industry** has a critical role to play in driving adoption and scaling social responsibility. In Phase 1, companies should acknowledge the issue, partner with NGOs, support pilots, and help define solution principles. In Phase 2, they should move beyond pilots to embed social responsibility into core business models, differentiate through responsible sourcing and labeling, actively engage their value chains, and participate in benchmarks to drive competition. In Phase 3, industry should collaborate pre-competitively, forming inclusive platforms and contributing to a shared sector-wide strategy.

In practice, industry is partially fulfilling these roles, but with significant gaps. There is clear overlap in Phase 1, where some retailers, brands, and buyers, primarily in U.S. and European markets, have begun to acknowledge the issue and partner with NGOs through pilots and initiatives. Similarly, a subset of first movers in Phase 2 are taking steps such as adopting certifications, making public commitments, and beginning to map their supply chains. However, these efforts remain limited in scale and ambition. Many companies are still unaware of risks in their supply chains or have not engaged at all, indicating incomplete progress even within Phase 1. In Phase 2, while some actions align with expectations, companies often fall short of true integration and differentiation. Commitments are vague, uptake is low (e.g., ~2% of global production certified), and there is little competitive pressure to drive broader adoption. Engagement is largely driven by risk mitigation rather than value creation, which slows momentum. Early signs of Phase 3, such as participation in pre-competitive platforms like SEA Alliance or ETI, are emerging, but remain small, fragmented, and not yet influential at scale.

Across the SMT phases, **civil society** plays a critical role in raising awareness, shaping the agenda, driving early solutions, and enabling scale. In Phase 1, NGOs should raise awareness of the crisis, campaign against laggards, engage in pilot projects, and set the direction for next steps. In Phase 2, their role should evolve to reward first movers, support proactive corporate strategies, continue holding laggards accountable, and signal the need to move beyond pilots toward broader adoption.

In this exercise, we intentionally focused on civil society, particularly NGOs and funders, given both their outsized influence in driving current initiatives and the fact that this is our own stakeholder group. This created space for honest self-reflection on how our actions are shaping the market we are trying to influence. In practice, civil society is partially fulfilling these roles, but with important gaps. There is strong overlap in Phase 1, where NGOs have been highly effective at exposing abuses, raising awareness, and initiating pilot projects. This has been essential in putting social responsibility on the agenda and catalyzing early action.

However, divergence becomes more apparent moving into Phase 2. Rather than consistently enabling scale, civil society is often stuck in a cycle of launching new or repetitive pilot initiatives, driven in part by a project-based, competitive funding environment. NGOs, often incentivized to secure funding and demonstrate quick results, may prioritize new projects over consolidating and scaling what already works. This dynamic, which is reinforced by funders, can lead to fragmentation, duplication, and misalignment across initiatives.

At the same time, there is a tendency to expect perfection over progress, with first movers not sufficiently rewarded for early action. This can discourage companies that are beginning to engage. Disagreement within the NGO community on topics such as whether to work with industry, which tools to prioritize (e.g., certifications vs. alternatives), or what constitutes the “right” approach combined with inconsistent use of “name and shame” tactics, creates mixed and sometimes conflicting signals for market actors. While calling out abuses is a critical and appropriate role, doing so without regard for the sector’s current phase of maturity can overwhelm or discourage actors who are beginning to engage, ultimately working against progress rather than accelerating it.

These dynamics raise an important and somewhat uncomfortable question: ***how might we, as civil society, be unintentionally slowing the very progress we aim to drive?*** In many

cases, the result is siloed, inefficient efforts, confusion among companies seeking guidance, and limited ability to move beyond the pilot phase.

Across stakeholder groups, gaps between current roles and what is required are collectively slowing progress toward system-level change. This exercise provided a structured way to clarify who needs to do what, when, and highlighted the importance of improving coordination, aligning efforts, and ensuring stakeholders play the roles best suited to advancing system-level change, whether that means strengthening impact within the current phase or enabling transition to the next.

7.3. CURRENT STATE OF SOCIAL RESPONSIBILITY IN SEAFOOD: STUCK BETWEEN PILOTS AND SCALE

By mapping both the current initiatives and stakeholder roles along the Sustainable Market Transformation timeline, we examined when the crisis emerged, which actors launched early pilots (Phase 1), how competition on social responsibility began to take shape (Phase 2), and whether there are signs of broader collaboration toward system-wide change (Phase 3). This analysis places seafood social responsibility between Phase 1 (projects and pilots) and early Phase 2 (first movers and initial competition), with growing activity and experimentation, but not yet widespread adoption or market-wide integration of responsible practices. Civil society actors remain largely between Phases 1 and 2, working to move social responsibility from niche to mainstream, but with limited uptake among market actors. At the same time, governments are still at the early stages of engagement (Phase 1), and their lack of clear direction has contributed to fragmentation, confusion, and slow progress. This lack of synchronicity often leaves market actors uncertain about how to engage, even when willingness exists.

While there are emerging signs of movement toward Phase 2, such as increased corporate engagement and scrutiny on impact, there are also premature pushes toward Phase 3 expectations (e.g., accountability and impact measurement) before sufficient market uptake has been achieved. As highlighted in the SMT model, phases cannot be skipped; critical mass must first be reached before system-wide transformation can occur. Ongoing challenges including fragmented, donor-driven projects, lack of coordination, competing tools and approaches, and insufficient industry uptake continue to keep the sector stuck between Phase 1 and early Phase 2. Governments' limited leadership reinforces fragmentation and weak incentives, industry efforts remain concentrated among a small group of frontrunners without achieving scale, and civil society, while instrumental to early progress, continues to face challenges with alignment and coordination, often remaining

stuck in project-driven approaches. Together, these dynamics prevent the sector from moving beyond pilots to widespread adoption.

Ultimately, despite a decade of activity since the 2014 crisis, progress remains constrained by misaligned incentives, limited collaboration, and unclear signals to the market, raising a critical question: ***how can the sector move from fragmented “noise” to coordinated “music” and support frontrunners in scaling solutions to achieve meaningful, system-level change?*** Addressing these gaps requires a more coordinated, strategic approach; specifically, shifting from fragmented efforts to aligned action. This will be explored in the following section outlining priority strategies to accelerate progress.

8. BUILDING A STRATEGY FOR SYSTEMIC CHANGE

Building on the future state vision, systems analysis, existing initiatives, and the sector's position within the SMT phases, the next step focused on identifying how different stakeholders can help accelerate progress toward system-level change. The goal of this section is to answer a central question: *who should do what, and when, to help move the seafood sector toward greater integration of social responsibility?*

This process focused on identifying actions most likely to shift incentives, unlock stalled progress, and support movement from fragmented efforts toward more coordinated and scalable approaches. Importantly, this includes considering not only what stakeholders should start doing, but also what they may need to stop doing — particularly activities that reinforce duplication, confusion, or inertia.


While strategic priorities were identified at a high level for government, industry, and civil society, the sections that follow focus primarily on civil society, particularly NGOs and funders, as this was the central focus of the workshop series and the area where participants identified the greatest sphere of influence.

8.1. STRATEGIC PRIORITIES PER STAKEHOLDER GROUP

Table 2 outlines high-level strategic priorities and potential actions for government, industry, and civil society stakeholder groups. These priorities were informed by the systems loops, stakeholder matrix, existing initiatives, and the sector's current stage of transition. While government and industry strategies were not developed collectively through the workshop discussions, they provide an important starting point for future engagement and cross-sector alignment.

Across stakeholder groups, a common theme emerged: the sector does not lack activity, but rather greater coordination, clarity, urgency, and scale. Progress will depend less on launching new initiatives and more on strengthening alignment, scaling effective approaches, and creating clearer signals for action across the system.

Table 2. Recommended strategic priorities for government, industry, and civil society stakeholder groups based on an analysis of the future state vision, current system dynamics, existing initiatives and the stakeholder matrix, and the sector’s position within the SMT phases. Note that government and industry stakeholder groups were not discussed as part of the workshop series; only civil society (with a focus on NGOs and funders, in particular). The priorities per stakeholder group feed into a cross-cutting strategic priority at the sector level.

Socially Responsible Seafood: Strategic Priorities		
<p>Align around a shared transition strategy and theory of change. Fragmentation is a core barrier; progress depends on coordinated action, not isolated efforts.</p> <p>Actions might include:</p> <ul style="list-style-type: none"> → Build a shared transition strategy: Align NGOs, donors, industry frontrunners, and multilaterals → Agree on common definitions (e.g., responsible recruitment, worker voice), standards, and expectations → Clarify roles: who leads, who supports, who adopts → Select and scale 2–3 priority initiatives collectively → Create a clear industry standard and reward system: Recognize frontrunners, apply pressure on laggards <p>Key enablers across all stakeholders:</p> <ul style="list-style-type: none"> → Context matters: Strategies must reflect regional differences (e.g., EU regulation vs. Asia production realities) → Urgency is currently too low: The system requires stronger signals through data, exposure, and accountability → Value must be clear: Change will not scale without a compelling business and economic case that emphasizes benefits (e.g. better reputation) and highlights costs of inaction (e.g. legal, reputational, supply chain disruption) → Alignment is critical: Fragmentation remains the biggest barrier; shared strategy is the unlock 		
↗		↖
GOVERNMENTS	INDUSTRY	CIVIL SOCIETY
<p>Shift from reactive bystanders to active enablers of early-stage transformation. Governments must move from intermittent, crisis-driven responses to setting direction, creating urgency, and enabling scale, while tailoring actions to their local transition context (e.g., EU vs. Asia).</p>	<p>Move from passive participation and risk mitigation to active integration and value creation. Industry must transition from pilots and compliance-driven action to embedding social responsibility into core business models and creating market incentives for scale.</p>	<p>Shift from fragmented, project-driven approaches to coordinated, scalable system change. Civil society must move from launching new initiatives to aligning efforts, consolidating to reduce duplication, and focus on enabling scale and clarity for the market.</p>

Right now, the sector does not lack pilots, tools, or conversations. Instead, the key challenge is translating existing momentum into more coordinated and institutionalized action capable of driving measurable improvements for workers and communities. While governments and industry play essential enabling and adoption roles, discussions throughout the workshop series focused primarily on the role of civil society in catalyzing and coordinating this transition.

8.2. CIVIL SOCIETY: FROM STUCK POINTS TO STRATEGIC PRIORITIES

Because civil society actors, particularly NGOs and funders, were the primary focus of the workshop series, participants explored in greater depth the barriers limiting progress within the movement itself, alongside potential strategies for accelerating collective action.

8.2.1. Stuck points and strategies exercise

The “stuck points and strategies” exercise was designed to help participants step back from individual initiatives and examine broader patterns shaping social responsibility in the seafood sector. The purpose was not to solve every challenge, but rather to identify high-leverage opportunities capable of reducing friction and helping move the sector forward collectively.

Participants worked within a matrix framework that mapped stuck points against potential strategies to unlock progress (**Figure 8**). Stuck points represented recurring barriers slowing progress toward sector-wide integration of social responsibility, while strategies reflected broader shifts in behavior, incentives, coordination, or decision-making that could help address multiple barriers simultaneously. Participants then identified where specific strategies could help unlock particular stuck points by marking intersections within the grid.

		STRATEGIES TO UNLOCK					
		1. Collaborate under a shared theory of change for system transformation	2. Organizations to focus on strengths, to avoid trying to do everything (e.g. urgency, business case development)	3. Stop creating more tools absent a shared theory of change; repackage, consolidate as much as possible	4. As much as possible, align messaging/asks of governments & industry	5. Bringing learnings from other sectors (eg) and successes of this movement	6. Leveraging social resp experts in the seafood space
STUCK POINTS	1. Funders reward visibility and novelty rather than scaling or consolidation	XX		XX		XX	X
	2. NGOs compete for funding instead of coordinating, resulting in projects that are fragmented & poorly aligned	XX	X	X	X		
	3. Disagreement among NGOs on best approach (eg. expecting industry to "do the right thing" vs. working WITH the market, silver bullet vs. toolbox approach)	X		XX	X	XX	X
	4. Dissect among NGOs leads to the common experience: confusion and overlap; clarity, promotes accountability among market actors about how to engage (e.g. creating an initiative in the silver bullet rather than a toolbox approach) and greater ownership over success than the good	X		XX	XX		
	5. Lack of ownership by market actors due to NGOs leading initiatives				X	XX	
	6. Tendency of traditionally environmentally focused initiatives/program taking on social responsibility	X					XX

Figure 8. Stuck points and strategies grid. A mural board containing this grid can be found [here](#).

8.2.2. Key stuck points identified

Several interconnected stuck points emerged from the discussion, all of which contribute to limited progress toward social responsibility in the seafood sector. Participants identified competition among NGOs for funding, influence, and visibility as a major barrier to coordination, often reinforcing fragmented initiatives and duplication rather than supporting the scaling of approaches already demonstrating impact.

Participants also highlighted disagreement across NGOs regarding the best pathways for advancing social responsibility, including differing views on market engagement, certification, and whether the sector requires a single solution or a broader toolbox of approaches. These divisions can create confusion for industry actors seeking clear and actionable guidance.

Another challenge discussed was the tendency for traditionally environmentally focused initiatives to add on social responsibility components without sufficiently integrating the expertise or systems needed to address labor and human rights issues effectively. Participants noted that this can contribute to superficial approaches and further duplication across the sector.

Collectively, participants agreed that fragmentation, mixed messaging, and lack of coordination across NGOs and funders have themselves become barriers to progress. The overarching challenge identified through the exercise was a lack of shared strategic alignment capable of supporting scalable, system-level change.

8.2.3. Strategies to unlock progress

In response to these stuck points, participants identified several strategies aimed at strengthening coordination, reducing duplication, and scaling approaches already demonstrating impact. Central among these was the need to collaborate under a shared theory of change for system transformation, shifting away from isolated, project-based work toward more coordinated and long-term approaches.

Additional strategies included encouraging organizations to focus on their comparative strengths rather than trying to do everything themselves, consolidating and repackaging existing tools and initiatives instead of continually creating new ones, aligning messaging and asks directed toward governments and industry, and drawing more intentionally on expertise both within seafood and from other sectors.

Together, these strategies reflected an overarching shift from fragmented efforts toward a more coordinated, systems-level approach grounded in collaboration, alignment, and scaling effective solutions. These strategies were then translated into more concrete strategic priorities and potential actions for NGOs and funders.

8.2.4. Strategic priorities and potential actions

Building on the stuck points and strategies exercise, **Table 3** outlines strategic priorities and potential actions for NGOs and funders aimed at accelerating progress toward sector-wide integration of social responsibility. The proposed actions are intentionally practical, relatively low-lift, and focused on improving coordination and alignment, helping move the sector from disconnected efforts toward more collective and scalable impact.

Table 3. Strategic priorities and potential actions to accelerate social responsibility in the seafood sector.

Strategic Priorities to Accelerate Progress in Scaling Socially Responsible Solutions in Seafood

Guiding question:

How can NGOs and funders reduce counterproductive competition (fragmentation, competition, mixed messaging) and create stronger alignment (including better coordination and collaboration) around approaches that are effective, scalable, and capable of driving measurable impact for workers and communities?

High-level strategy:

Shift from fragmented, project-driven approaches to coordinated, scalable system change. Move from launching new initiatives to aligning efforts, consolidating in order to reduce duplication, and focus on enabling scale and clarity for the market.

1. Create a shared theory of change for system transformation

About: The single highest-leverage strategic priority is for NGOs and funders to align on a shared transition strategy rather than pursuing fragmented approaches. This does not require a new framework from scratch: the Future State Vision developed in this series, the Fisheries Governance Project's corporate duties document, and the Issara Institute model offer ready starting points. Crucially, leadership within organizations must publicly commit to this alignment so it cascades to program teams. Aligning around a shared theory of change includes shifting from project-based work toward scaling and consolidation, ideally reducing fragmentation by consolidating tools and initiatives, prioritizing alignment and clarity for market actors.

Number of stuck points this strategy could unlock: 5

Actions might include:

- **Convene a small core group of NGOs and funders to agree on a common or "good enough" baseline:** Align on a shared starting point (e.g., Future State Vision + 1–2 existing frameworks like FGP or Issara)
- **Define who plays what role** (e.g., convening, business case, policy advocacy, implementation), ensuring organizations contribute based on their unique roles and expertise rather than competing to do everything themselves, focusing on comparative strengths and improving transparency, trust, and coordination across NGOs
- **Define "stop doing" list:** Explicitly agree on behaviors to stop, such as: launching duplicative tools, competing for the same work without coordination, sending conflicting guidance to industry
- **Document a simple, shared theory of change:** 1–2 pages; not a new framework, but a synthesis
- **Set up a lightweight coordination structure** (e.g., monthly working group, shared Slack/Teams channel)

2. Reduce duplication by consolidating and repackaging existing tools and initiatives

About: Another high impact strategy to reduce fragmentation is to consolidate existing tools and initiatives and improve coordination. This increased clarity can accelerate uptake of proven solutions, and shift away from disconnected pilots and competing initiatives toward coordinated action. This would help build momentum, strengthen collective influence, and enable resources to be directed toward scaling approaches that demonstrate meaningful impact for workers and communities.

Number of stuck points this strategy could unlock: 4

Actions might include:

- **Map and consolidate existing initiatives:** Using the mapping of current initiatives in this document, identify: 1) overlap and duplication, 2) top 2–3 tools/approaches to prioritize and scale, and 3) agree on what to stop, merge, or deprioritize

- **Pause new tool creation:** Consolidate, improve, and scale existing ones
- **Identify 1–2 existing initiatives to jointly support and scale** (instead of launching new ones)
- **Coordinate with peers before launching new initiatives:** Even informal alignment reduces duplication
- **Funders: incentivize collaboration over novelty:** Require partnerships or alignment in grantmaking, test co-application for funding or pooled funding approaches

3. Align messaging and asks directed toward governments and industry

About: This strategy aims to strengthen collective influence by creating clearer, more consistent messaging and coordinated asks directed toward industry and governments. Aligning guidance, simplifying pathways for engagement, rewarding frontrunners, and creating greater urgency through transparency and accountability mechanisms would help reduce confusion, accelerate market action, and build momentum for sector-wide change.

Number of stuck points this strategy could unlock: 4

Actions might include:

- **Create a simple “how to engage” guide for industry:** Reduce conflicting guidance to industry, translate complexity into actionable steps, develop 3–5 clear, consistent “asks” for market actors
- **Reward and amplify first movers:** Shift from perfection → progress mindset
- **Create urgency in the system:** Use rankings, media exposure, scientific reports, and transparency tools. “Hit where it hurts” to drive attention and action

4. Leverage existing expertise and cross-sector learnings

About: This strategy aims to strengthen the movement’s effectiveness and credibility by drawing on successful approaches from other sectors, while better leveraging the expertise of social responsibility practitioners already working within seafood. Building on existing knowledge, lessons learned, and proven models can help accelerate progress, avoid reinventing the wheel, and strengthen the sector’s capacity to drive meaningful and scalable change.

Number of stuck points this strategy could unlock: 3

Actions might include:

- **Draw on successful approaches from other sectors:** Facilitate shared learnings with experts in other sectors (particularly agriculture)
- **Strengthen expertise and credibility:** Elevate social responsibility experts within seafood spaces

Several high-level strategies emerged as particularly important because they addressed multiple stuck points simultaneously, especially those related to fragmentation, duplication, and inconsistent messaging. Collectively, these priorities emphasize coordination, shared direction, and scaling existing momentum rather than continually creating new initiatives.

Taken together, the stuck points, strategies, and strategic priorities identified through this process point toward a broader conclusion: accelerating progress toward social responsibility in seafood will depend less on creating new initiatives and more on strengthening coordination, alignment, and collective action across the movement. While many of the challenges identified are deeply systemic, participants emphasized that

meaningful progress can begin through smaller, practical actions that build trust, reduce fragmentation, and create momentum for longer-term institutional change. The following section therefore shifts from strategy development to implementation, focusing on realistic opportunities for NGOs and funders to begin moving this work forward together in 2026–2027.

9. MOVING FROM FRAGMENTATION TO COLLECTIVE ACTION

This workshop series explored why progress toward social responsibility in the seafood sector has remained slow despite a decade of growing attention, pilots, and initiatives. Applying the Sustainable Market Transformation (SMT) framework revealed that the challenge is not a lack of activity, but rather a system of reinforcing incentives and fragmented efforts that continue to limit coordination, scale, and long-term impact. Across the systems analysis, stakeholder mapping, and strategy discussions, one core insight consistently emerged: accelerating progress will require shifting from disconnected, project-based approaches toward greater alignment, coordination, and collective action across stakeholders.

Importantly, this work reinforced that systems change is not linear, nor can it be driven by any single actor alone. Governments, industry, and civil society all influence the system simultaneously through the incentives, expectations, and behaviors they reinforce. Meaningful transformation will therefore depend on changing the “rules of the game” so that socially responsible practices become the most viable, attractive, and ultimately normalized way of operating across the seafood sector.

The analysis also highlighted that the movement is currently stuck between early experimentation and broader scale. While important groundwork has been laid through pilots, certifications, worker engagement mechanisms, and emerging regulations, fragmentation, competition, duplication, and mixed messaging continue to limit momentum. In many cases, the challenge is no longer identifying new solutions, but rather determining what should be scaled, what should be consolidated, and what approaches may no longer be serving the movement effectively.

A central goal of this workshop series was therefore not only to better understand the barriers limiting progress, but also to identify realistic opportunities for collective action. Throughout the discussions, participants repeatedly emphasized that the sector does not lack activity, pilots, or initiatives. Rather, the primary challenge is translating existing momentum into more coordinated, scalable, and institutionalized action capable of driving meaningful impact for workers and communities.

Recognizing this, participants focused on identifying “low-hanging fruit,” or practical actions that are achievable within the current sphere of influence of NGOs and funders, require minimal new infrastructure, and could begin improving coordination and alignment across the movement. Importantly, the goal was not to develop perfect or comprehensive

solutions, but rather to identify small, observable steps that could build trust, demonstrate momentum, and create a foundation for deeper collaboration over time.

Based on the stuck points and strategies exercise, the strategic area that emerged as a particularly important starting point for 2026–2027 was creating a shared theory of change for system transformation. This strategic area was prioritized because many of the other proposed strategies ultimately build on, or stem from, greater alignment around a shared direction and approach for the movement. It also addresses multiple interconnected barriers simultaneously, including fragmentation, duplication, mixed messaging, and lack of coordination, while remaining relatively feasible and low-lift for participating organizations to advance together.

Recommended near-term actions include convening a small core group of NGOs and funders to align around a “good enough” shared baseline using existing frameworks already familiar to the group, alongside establishing a lightweight coordination structure such as a recurring working group or shared communication channel. These actions build on existing relationships and resources rather than requiring new institutions or initiatives, while helping strengthen alignment, trust, and coordination across organizations.

The strategy of leveraging existing expertise and cross-sector learnings could serve as a practical entry point for convening NGOs and funders around something concrete and actionable. Rather than starting from scratch, this would allow for drawing on more advanced models and lessons learned from other sectors, particularly agriculture, to help inform how the seafood movement might build greater alignment and develop a shared theory of change. Facilitating shared learning exchanges with experts from other sectors is a relatively low-lift way to bring organizations together around real examples of what coordination, scaling, and institutionalization can look like in practice.

Collectively, these actions are intentionally modest in scope, but strategically designed to begin shifting behaviors, improving coordination, and creating clearer signals across the sector. Rather than launching new initiatives, the emphasis is on strengthening alignment around existing momentum and demonstrating that collective action is possible. Progress will ultimately depend on whether NGOs and funders are willing to prioritize coordination, shared direction, and scalable impact over organizational competition and fragmentation, and whether stakeholders across the sector are prepared to work together to gradually transform the underlying incentives shaping the seafood system.

10. ANNEXES

Annex I: Detailed list of behaviors/responsibilities of key stakeholder groups

GOVERNMENTS	INDUSTRY	CIVIL SOCIETY
<p>BOTH EXPORTING AND IMPORTING COUNTRIES:</p> <p>Create and enforce laws requiring compliance with social responsibility standards and the data necessary to validate reporting.</p> <p>There is integrated governance across fisheries, aquaculture, labour, gender equality, and human rights, and across the countries involved, so that decent work doesn't fall through jurisdictional cracks.</p> <p>Governments employ a human rights approach to protect individuals within their jurisdictions.</p> <p>Custodian of 'sustainability'.</p> <p>Champion digital transformation.</p> <p>Assign financial resources (for personnel and technology) to their fisheries sectors to address human rights and sustainability.</p> <p>Policy and funding partner (to scale initiatives).</p> <p>Create and enforce remediation mechanisms for issues within and outside of the country.</p> <p>Support organization of fishers/farmers/</p>	<p>FISHERS/FISHING COMMUNITIES/FISH FARMERS/WORKERS (includes unions):</p> <p>Fishers/workers and communities engaged in seafood are thriving. The seafood sector provides "good" jobs.</p> <p>Independent, membership-based organizations (of fishers) are strengthened. Recruitment pathways are formalized, equitable, and safe.</p> <p>Power and value shift to producers.</p> <p>Traditional communities' fishery access rights and resource stocks are respected.</p>	<p>NGOS (does not incl. unions):</p> <p>Harmonize the numerous certification and monitoring schemes on social issues. Aligned support for a continuous improvement journey and appropriate end goals for different situations (harmonization doesn't mean identical).</p> <p>Collaboration with governments or transnational bodies that have the scope and resources to form neutral convening platforms.</p> <p>Punish business-as-usual players that do not join the movement towards sustainability.</p> <p>Lobby for effective mechanisms to prevent and punish bad actors, as NGOs do not have enforcement capacities.</p> <p>Good behavior is made visible (e.g, by voluntary sustainability standards).</p> <p>NGOs and academia share resources and data and collaborate transparently, focusing on alignment and standardization (no duplication) to support the movement.</p>
<p>EXPORTING COUNTRIES:</p> <p>Strengthen the regulatory environment regarding labor conditions.</p> <p>Be open to, or promote, the formation of labor unions and other joint worker initiatives. Reduce barriers to</p>	<p>ALL SUPPLY CHAIN ACTORS DOWNSTREAM OF FISHERS:</p> <p>Companies, with the help of NGOs, share more knowledge and enhance mutual transparency on their sourcing practices.</p>	<p>PHILANTHROPY:</p> <p>Main funders (government and philanthropy) coordinate program efforts to align while innovating.</p>

<p>organizing. Crack down on union busting.</p> <p>Integrate transnational initiatives on social practices into national policies.</p>	<p>Encourage better producing practices upstream in the value chain (retailers as key influencers).</p> <p>Focus on building long-term relationships with suppliers to enhance mutual trust and transparency.</p> <p>Companies know where their products come from and the conditions under which they were produced/harvested.</p> <p>Companies operate under the commitment that every actor in the supply chain is better off for being part of the chain - everybody wins, including the business.</p> <p>Purchasing practices evolve to incorporate long-term sustainability investments. The cost of sustainable production is included in the price of seafood.</p> <p>Industry advocates for and acts in the interest of the well-being of people in its supply chain.</p> <p>Business leaders, owners, and managers recognise that businesses have multiple goals and that taking responsibility for providing decent workplaces and safe food is as important as generating profits.</p>	
<p>IMPORTING COUNTRIES:</p> <p>Develop a strong vision for a sustainable sector and work with other countries to integrate compliance criteria into their trade policies.</p>	<p>RETAILERS AND BRANDS:</p> <p>Buyers reduce the low-cost, high-quality, high-volume pressure on suppliers by aligning their sourcing criteria with long-term social</p>	<p>CONSUMERS:</p> <p>High consumer awareness of "who" seafood comes from and the challenges leads to changes in consumer purchasing decisions.</p>

<p>Standardization and commitment across governments in the data they collect, the regulation and governance they have in place, and transparency in sharing.</p> <p>Work with exporting governments to strengthen the local enabling environment and formalize the production base.</p> <p>Import countries actually ban products and halt trade with sourcing countries known to run government programs involving forced labor.</p> <p>Reward initiatives taken by the industry that promote sector sustainability (i.e., provide funding to companies that aim for more sustainable production, especially small-scale companies)</p>	<p>impacts rather than focusing exclusively on price.</p> <p>Build upon the leverage points in the setup of the seafood value chain (i.e., a few globally operating companies in the middle of the value chain).</p>	
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Annex II: Ideas on Mural Board that are more solutions-oriented (as opposed to future state vision)

GOVERNMENTS	INDUSTRY	CIVIL SOCIETY
<ul style="list-style-type: none"> • Governments participate in existing legal standards like the PSMA and the Cape Town Agreement • Govt and multigovernment agreements do not have a disproportionate negative effect on small-scale fishers (such as current issues with EUDR in ag) • Advocate for SSF in International Trade and Policy • Increased government ratification of ILO C188 and effective implementation • Government planning moves properly away from GDP per capita growth as the main economic goal and towards wellbeing economy principles, post-growth, steady-state prosperity ideas. • HRDD laws for importing and exporting countries. • Mandatory GDST-aligned traceability. • Capacity building (for data collection, MCS, infrastructure). • Many exporting countries are developing countries with limited resources, so the burdens of effort need to be distributed equitably. • This means China and Japan, as well as the US and EU. How to make that happen? 	<ul style="list-style-type: none"> • Industry commits to fairer labor conditions and purchasing practices • Beyond recognizing FOA as a right, Industry sees trade unions and other worker-led efforts as a primary solution to human rights risks, and therefore promotes, protects, and enables FOA • Businesses are run on accurate cost accounting - costs are covered in a way that everyone can act responsibly and have healthy livelihoods, and we are not consuming more than what is sustainable • Use the existing tracking and tracing system for sustainability issues • Remedy channels are provided for workers • Wifi on every vessel. Must be accessible to fishers and not restricted. • Engage global and national trade unions • Advocate for ILO C's 87, 98, 188 • Require clear 	<ul style="list-style-type: none"> • Support frontrunners and create accountability for laggards by benchmarks (note: eventually, benchmarks on corporate performance should be turned into sector reports to assess collective action) • NGOs do not publicly attack companies that show improvement; instead, they offer support, encouragement, and reward transparency of actions, whether they succeed or fail, for the sake of the larger movement • NGOs work with companies and organizations that understand business to suggest solutions that will work within a complex business operation • A range of solutions is supported - no more undermining, and collaboration improves • No more pilots of human rights efforts - instead, innovative efforts are established at a small scale with a design to improve, expand, and scale over the long term • NGOs draw on unions as they advocate for rights. Unions work proactively with NGOs to identify and implement macro-level (e.g., fisheries, international, etc.) changes. • NGOs engage and coordinate with local stakeholders and organizations to facilitate improvement • Act as implementation partners

	<p>contracts, preferably collectively bargained agreements</p> <ul style="list-style-type: none"> ● Industry claims are standardized and utilized universally, allowing consumers to make informed purchasing decisions. ● First buyers comply with basic responsible practices (eg, fair price, no debt as entrapment) ● Co-investor in value chain infrastructure, especially at the 1st mile ● Price premiums for social responsibility ● Radical Transparency and Traceability. Systems/tech in place and being used to have visibility into activities on the high seas ● Equitable revenue distribution ● Inclusive, localised market systems ● Frontrunners lobby for the institutionalization of this 'new normal', making sustainability part of the legal framework and enabling environment, further rewarding responsible behavior and punishing laggard stakeholders 	<p>with Development Agencies, Multilaterals</p> <ul style="list-style-type: none"> ● Independent journalism continues to shine a light on social issues in the sector, which promotes action in policy and business ● NGOs support fishers and fisher orgs to represent themselves rather than talk for them ● Labor inspectors are empowered and have port access
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	that still benefit from unsustainable practices.	
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