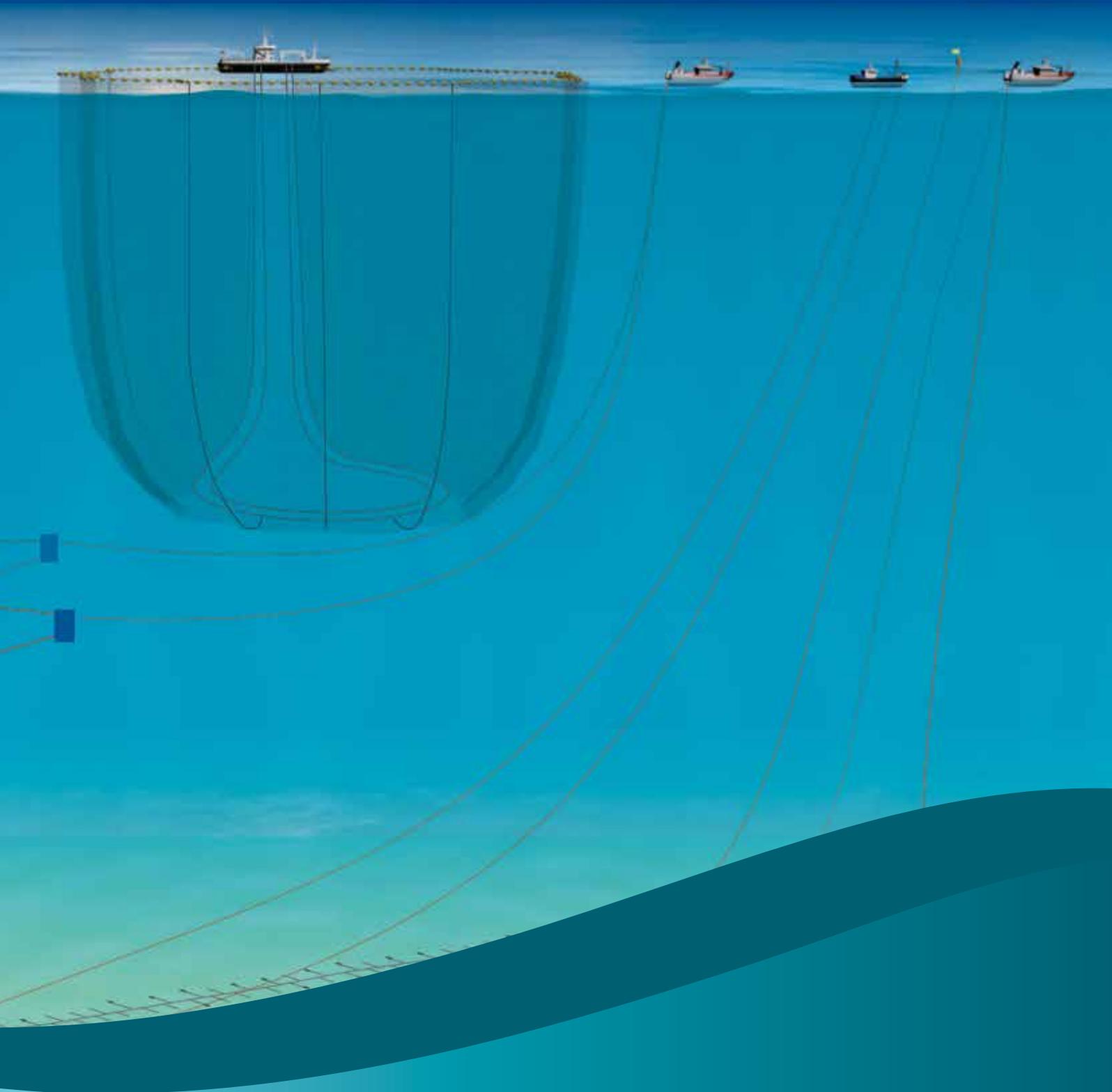


# Seafood Strategic Outlook

Spring 2016



**The next NGO priority:**  
An initial review of developments, implications  
and practical responses from industry and Seafish

Author: Dr Angus Garrett

**SEAFISH**  
the authority on seafood



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## 1. Introduction and requirement

This report is focussed on the emerging priorities for NGOs. It considers the major industry impacts arising from NGO areas of focus and sets out major areas where industry and Seafish response may be required as well as identifying areas of potential collaboration.

There are areas that responsible seafood businesses and NGOs share a common interest. For example in marine advocacy, it is evident that both sectors have more to benefit from greater alignment and shared agendas than they do from confrontation and conflict.

Industry is coming to terms with the data gaps and governance deficiencies in both wild capture fishing and aquaculture operations. However, the manufacturing sector often suffers from narrow margins and many primary seafood production sources are in developing world countries which are not cash rich.

Operating within legal supply chain networks does not guarantee that industry standards for sustainable or ethical sourcing have been met. Executing the improvement objectives required by responsible business policies often requires funding and collaborative alignments. This can be beyond the capability and organisational reach of even the largest seafood businesses.

The NGO sector administers significant funds for the purpose of research and advocacy. Whilst these funding channels are rightly open to not-for-profit civil society organisations, their scale and disposition are poorly understood by industry. This can create an unnecessary and avoidable tension between the NGO funding agencies and responsible actors in the market place. Given the shared interest in responsible stewardship, it is appropriate that industry should seek a better understanding and closer relationship with the NGO sector. This would support better, more proactive, engagement with NGOs and amplify beneficial impacts through collaborative efforts.

The Seafish mission is to secure a profitable, sustainable, and socially responsible future for the UK seafood industry. An important underlying function in achieving this mission is to help support the industry in the face of challenges, including those prioritised by NGOs.

Risk developments in the macro trade landscape can present longer-term, strategic challenges for the industry (see Annex 1). Reflecting on these developments in 2015, the Seafish Board decided *“The Foundations are taking an increasing interest in seafood/marine issues evidenced by the explosion of campaigns and single issue groups. We need to be sighted on the forthcoming issues in order to provide a robust, unbiased evidence base on which to inform our actions.”* This review is an important part of responding to this need.

This report aims to support the UK seafood industry in understanding:

- The major NGOs interacting with the seafood industry.
- The new and emerging NGO priorities expected to impact on the industry.

Unlike other reviews, this particular review will focus on higher-level questions and not proceed to industry opportunities and threats, at this stage. Although examples are given, industry impacts and response is not the main focus of this review. This exercise, conducted in 2015, involved desk research and consultation with Seafish staff (see Annex 2). This review has a number of limitations. The scope of consultation is not exhaustive. In addition, the review does not consider alternative future pathways (scenarios), but is based on ‘business as usual’ projections.

## 2. UK seafood industry and NGOs

This chapter provides a representation of the seafood industry and NGO landscape. For the purposes of this review, the focus is on NGOs having environmental and social concerns relating to the seafood industry. However, it is necessary to set out NGO characteristics in general as these are shared by NGOs of specific interest. The representation of this landscape frames the investigation, discussion and agreement on risk developments, impacts and responses.

### 2.1 UK seafood industry

The UK seafood industry, being reliant on wild capture and aquaculture produced raw material, is diverse, complex and dynamic. The seafood industry is considered here to operate as many subsystems (regional, sectoral), of varying degrees of interdependence, nested within one overarching global system.

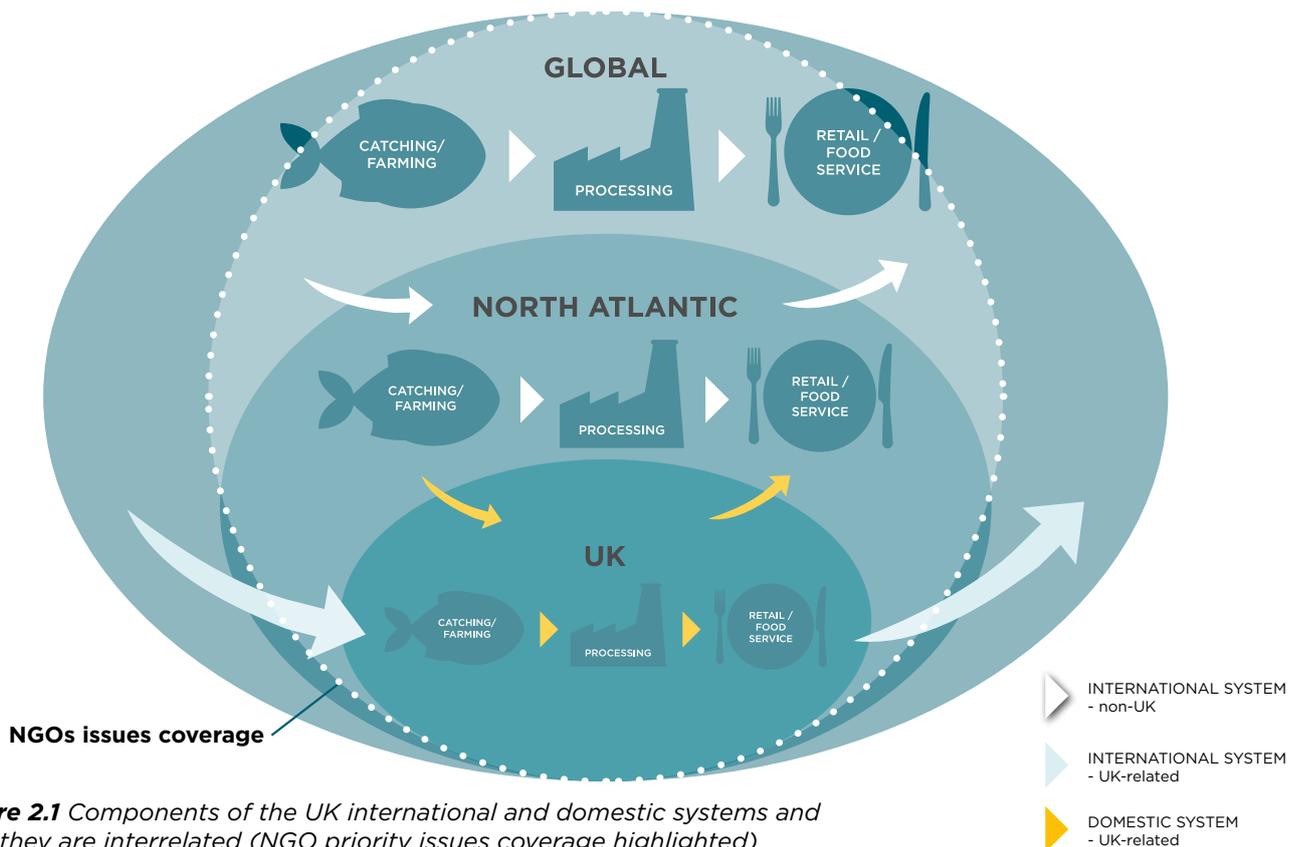
In the global context, from a UK perspective, there are at least two major seafood systems with distinct characteristics:

- A domestic system – defined as a system reliant on domestically sourced material (material caught from stocks in North Atlantic/UK waters and landed in the UK, material farmed in the

UK). Within the ‘domestic system’, the key UK actors are: farmers/vessels, agents and merchants in the UK handling material landed/ farmed in the UK; UK processors of fish; and the downstream supply chain in the UK of all of the former including food service companies, retailers and exporters.

- An international system – defined as a system reliant on internationally sourced material (material caught from stocks in the North Atlantic and elsewhere landed outside the UK, material farmed outside the UK). Within the ‘international system’, the key UK actors are: agents and merchants in the UK importing fish and shellfish that is caught, landed or farmed and possibly processed outside of the UK; UK processors of imported fish; and the downstream supply chain in the UK of all of the former including food service companies, retailers and re-exporters.

It is notable that from a UK perspective, imported seafood material is largely for UK consumption, whilst material originating in the UK is generally exported for overseas consumption. The UK consumer maintains a robust preference for salmonids (farmed salmon), whitefish (cod, haddock and Alaska pollock), pelagics (tunas) and shellfish (cold-water prawn and farmed warm-water prawn). Meanwhile, UK landings volumes are dominated by mackerel and herring (pelagics), Nephrops (shellfish) and cod and haddock (whitefish).



**Figure 2.1** Components of the UK international and domestic systems and how they are interrelated (NGO priority issues coverage highlighted)

## 2.2 NGO landscape

### 2.2.1 Defining a grey area

- Non-Government Organisations (NGOs) are challenging to define, and a number of definitions exist. For the purposes of this exercise an NGO is a *legally constituted organization created by private persons or organizations without participation or representation of any government. The term originated from the United Nations, and is usually used to refer to organizations that are not conventional for-profit businesses. NGOs can be organized on a local, national or international level (INGO)<sup>1</sup>.*
- With the definitional challenges in mind, they are perhaps easier to understand in terms of what they are not (e.g. not-for-profit, non-public, non-criminal, etc) and the roles they play.
- NGOs can emerge where there are instances of market failure (perceived or real) and policy areas where governments fail to act (Willettts, 2013; New World Encyclopedia, 2016).
- NGOs operate within a spectrum of wider interests and representation which is bounded by private individual interest at one end and shared interest of the general population at the other (Fig 2.2).
- Where private interests are concerned, industry forms part of the NGO landscape, forming non-profit making sector associations and issue-based NGOs (Willettts, 2013).
- Where shared or public interests are concerned, public authorities have an interdependent relationship with NGOs.
- NGOs operate at multiple levels, operating locally, nationally, within regional blocs and internationally.
- With regard to the roles played by NGOs, some of the main roles have been set out in table 2.1. Individual NGOs may undertake several roles with others specialising in particular roles as ‘boutique’ NGOs with niche expertise.
- Given that issues of concern emerge and mature, we might observe that the roles played by NGOs shift over time e.g. advocacy in early stages moving towards expert/manager/watchdog at later stages.
- In general NGOs increasingly collaborate through coalitions, drawing from the portfolio of roles, to maximise impact.

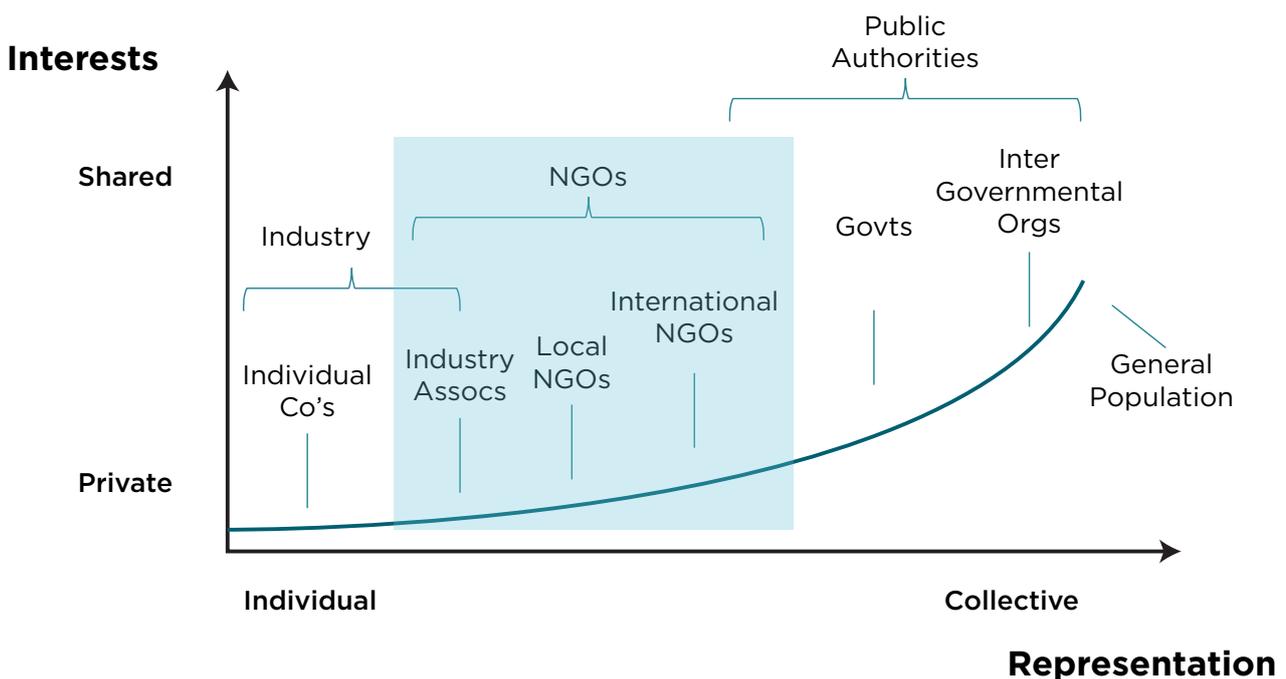


Fig 2.2 NGO activity (highlighted) within a spectrum of wider interests and representation.

**Table 2.1 Roles played by NGOs**

Role	Description	Example activities
Advocate	Drawing attention to or cultivating concern about issues; rallying support for a specific agenda	<ul style="list-style-type: none"> <li>• Lobbying government and industry</li> <li>• Participating in cross-sector collaborations as the voice of the environment, wider society etc</li> <li>• Lawsuits</li> <li>• Direct action</li> <li>• Some education and outreach</li> </ul>
Expert	Providing scientific input into specific agenda; increasing organizational knowledge	<ul style="list-style-type: none"> <li>• Original scientific research</li> <li>• Development of scientific tools e.g. conservation tools</li> <li>• Providing solicited process or science expertise</li> </ul>
Manager	Directly implementing specific agenda; engaging in hands-on activities	<ul style="list-style-type: none"> <li>• Land or easement purchases</li> <li>• Management or co-management of protected areas</li> <li>• Service provision</li> <li>• Habitat restoration</li> </ul>
Watchdog	Enforcing agreements; preventing or stopping illegal activities, or activities seen as incompatible with a specific agenda	<ul style="list-style-type: none"> <li>• Monitoring compliance and publicizing infractions</li> <li>• Direct action, including direct interference with targeted activities</li> <li>• Lawsuits</li> </ul>
Enabler	Empowering others to manage or provide input into issue of concern and specific agenda	<ul style="list-style-type: none"> <li>• Capacity building</li> <li>• Funding provision</li> <li>• Providing opportunities for stakeholder involvement in agenda activities</li> <li>• Tool provision</li> <li>• Process facilitation</li> <li>• Network creation</li> </ul>

Source: Generalised from Crosman (2013)

### 2.2.2 NGO development and critique

- Although the term ‘NGO’ may be relatively new (1945) this type of operation, in one form or another, has a much longer history (Willetts, 2006). ‘NGOs’ were involved in anti-slavery in the 1800s and, for some, have existed as long as there has been government (Willetts, 2013).
- However, in modern times the number of NGOs has exploded, particularly at the international level (New World Encyclopaedia, 2016). Estimates of this proliferation vary considerably, but one estimate suggests that between 1950 and 2005 the number of active international NGOs grew from 832 to 27,472 (Turner, 2010).
- The combination of globalisation, together with the ‘governance dilemma’, has provided the conditions for international NGOs to proliferate. The development of global institutions (particularly the League of Nations and then the United Nations in 1947) and globalisation has facilitated a growing world society or culture (Boli & Thomas, 1997). At the same time, we have a ‘governance dilemma’ of living between two extremes: a world that is wholly unregulated and a world that is governed by an oppressive, coercive global authority (world government). That is, *“collectively we stand to benefit from a world governed by rules and institutions...yet we also collectively*

*resist the creation of the institutions that might provide increased governance because of the threats those institutions pose to our liberty”* (Anderson, 2005).

- National governments have increasingly responded not only to the interests of their societies, but also to the values and principles promoted by international NGOs, *with the impetus for action coming from the transnational level.* (Boli & Thomas, 1997). The most prominent NGOs are those involved in issues that generate conflict between these principles and the values and preferences of local societies.

Although NGOs can play a valuable role in responding to market failure or failings of government, they are not without criticism. Questions have been raised, for example, in relation to the following concerns:

- *Legitimacy* - the degree to which NGOs are accountable and have an ‘independent voice’ (e.g. Chandhoke, 2005; Wild, 2006).
- *Interests served* - serving special interests and a relatively narrow range of issues, there is no need for NGOs to worry about trade-offs or wider impact (e.g. Matthews, 1997; McGann & Johnstone, 2005).

- *Appropriateness* (in the case of international NGOs) - extending foreign policy or cultural preferences of home country (e.g. Bond, 2000).
- *Independence* - given the sometimes large share of public funds received by NGOs to manage delivery, or at expense of local society (e.g. Agg, 2006).
- *Operation* (in the case of international NGOs) - looking like multinational businesses that are tax exempt, (e.g. Huggett, 2012) and general concerns raised around UK charitable fundraising and business ventures e.g. Age UK (Ruddick & Macalister, 2016).

### 2.2.3 NGO interaction with seafood

- The NGO sector interacts with the seafood industry on issues across the entire seafood system, at multiple levels (national, supra national, and international levels). Example issues include: ‘sustainability of the marine resource’ (production stage); ‘standards and ethics - including slavery’ (supply chain); and ‘sustainable diets’ (consumption).
- This brief review has identified that in the last ten years over 1,000 organisations have been active nationally and internationally in the seafood related NGO landscape. Activity includes conducting research, participating

in conferences, political lobbying and campaigning, receiving sponsorship etc, with these organisations ranging from minor to prominent players. In reviewing this landscape, table 2.2 is a summary illustration of the range and number of organisation types identified:

- At one end of the spectrum there are a number of private companies, such as seafood brand owners or consultants (125), actively engaging with NGO agendas. These may be driven by a CSR agenda, or providing research services. At the other end of the spectrum are public authorities (those organisations set up as governance organisations) engaging with NGO agendas (27). These exist either at sub-national government (15), national government (8) or inter-governmental (4) level and may be driven by policy requirements (formation, delivery, for example).
- The core of the spectrum contains NGO type organisations (766) containing industry associations (67) active in the NGO landscape, and the more familiar food and marine focussed NGOs (604), other related NGOs (76) and foundations (35). The latter are set up as charitable or philanthropic foundations to provide resources to initiatives and other organisations, active in the NGO landscape.

**Table 2.2 Organisation types and prominent players active in the seafood related NGO landscape (illustrative)**

Type		Prominent player	No.
Private		Company (seafood brand owners, consultants etc)	125
		Industry association	67
NGO		Food and marine related NGO	588
		Other related NGO	76
		Charitable or Philanthropic Foundation	35
	Public	Educational establishment	168
		Government (national and regional)	23
Inter-governmental organisation		4	
	Others (e.g. media)	n/a	30
<b>Total (excluding ‘Others’)</b>			<b>1,086</b>

- An important influence on the roles played by NGOs is how activity is financed. NGO activity is financed through private donations (individual charity), private wealth (individual bequests, corporate gifts, philanthropic trust funds - often the result of competitively accumulated wealth), and public funds (government finance raised through general taxation). Important actors are NGOs:
  - Undertaking an enabling role, particularly foundations (philanthropic trust funds and their oversight committees) - these are oriented towards demonstrating impact in line with founding values and principles in the *provision* of resources.
  - Actively delivering (i.e. fulfilling advocate/expert/manager/watchdog roles), these may be oriented towards:
    - Collaboration in order to *leverage* resources (e.g. WWF).
    - High profile action that can *generate* resources through private donations (e.g. Greenpeace).

- Within the enabler group, the foundations are an important financial resource for other NGOs. This attention, however, should not disregard the influence of other enablers (e.g. national governments and inter-governmental organisations) able to provide financing through various funding programmes.

## 2.3 Framing activity in the NGO landscape - dimensions

Activity in the NGO landscape relating to the seafood industry, by NGO role and risk priority, is summarised in table 2.3. Specific risk priorities vary by location in the supply chain. Examples are provided to illustrate how these impact on the industry (opportunities and threats).

- Seafood related NGO activity interfaces with industry across the industry system from production to consumption. The focus of NGO activity can therefore be categorised as focusing on practice at particular parts of the industry system: resource or production stage; overall industry chain; and the market or consumption stage (see Fig 2.3).

**Table 2.3 Activity in the NGO landscape**

Role	Areas of risk priority	Examples of action	Example actors in the landscape
Advocate	Condition of resource or product integrity	Boycotting of product or outlets	Greenpeace, World Wildlife Fund, Nature Conservancy, Global Ocean Legacy, Seafish
	Access to resource	Restriction on fishery: MPAs resulting in much reduced fishing or total exclusion	
	Controls on industry practice	Banning specific practices e.g. gear type (trawling), discards etc Highlighting and encouraging controls in areas where no governance exists e.g. activity in the Arctic	
	Commentary on practice (policy/industry/consumers)	Ecosystem impacts of expanded aquaculture, slave labour, etc, resulting in boycotting of product or outlet.	
Expert	Policy cycle and decision-making	Platforms that allow specific expertise to be fed in (e.g. biological/ecological expertise informing environmental assessments)	New Economics Foundation Environmental Defense Fund, Seafish
		Platforms that allow NGOs to promote specific (often single issue) agendas	
	Consumer / business decision-making	Huge success of MSC in certifying seafood	
Manager	Management conditions and oversight	'Top-down' driven fishery improvement projects (FIPs)	Sustainable Fisheries Partnership, World Wildlife Fund
	Providing alternative routes for practice	Innovative platforms for supplying product	Plan Zheroes

Table 2.3 Activity in the NGO landscape (cont.)			
Roles	Areas of risk priority	Examples of action	Example actors in the landscape
Watchdog	Policy cycle and decision-making	Potential for litigation that can impede or halt industry practices e.g. CFP implementation and management of fisheries and compliance/enforcement in MPAs	Client Earth, Sustainable Seafood Coalition
	Consumer / business decision-making	Enabling solutions in novel situations (e.g. assessing sustainability for fisheries outwith the MSC framework)	
Enabler	Providing alternative perspectives	Critique of policy from a non-industry perspective e.g. Criticising proposed regulation from the European Commission such as Gillnet ban (overturned), Deep water fishing (criticised)	Foundations: Packard, Moore, Walton, Pew, Oak, Fairbairn, Ellerman, Omidyar  New Economics Foundation Environmental Defense Fund, World Wildlife Fund
	Projecting influence	Platforms that serve sectional interests at expense of other stakeholders e.g. Seafood summit as platform for NGOs in the absence of industry	
		Direct sponsorship of representation in order to shape policy e.g. Common Fisheries Policy	

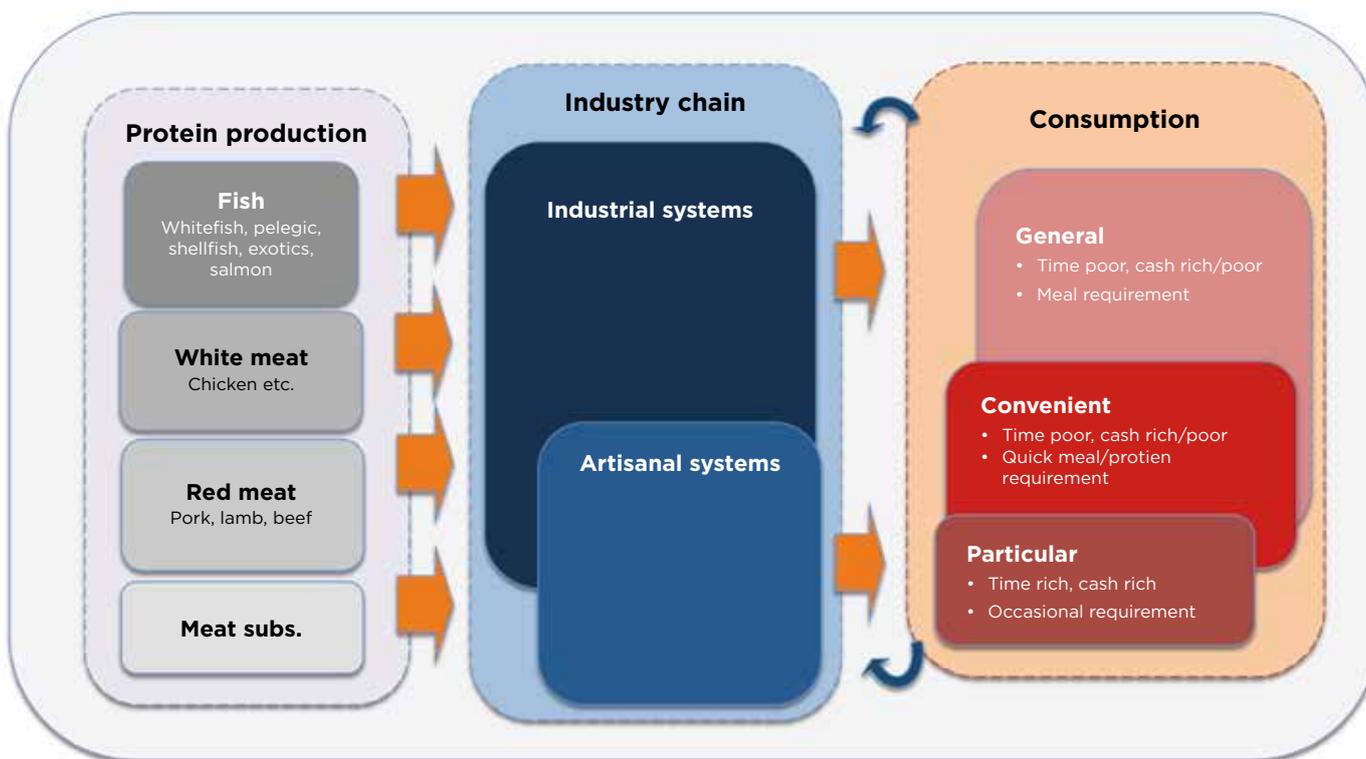


Figure 2.3 Current UK seafood and protein landscape from production to consumption

## 2.4 Specific NGO activities relevant to UK seafood

- At present there are various levels of initiative by NGOs, relevant to seafood consumption and production (see table 2.2).
- Given the resources available through philanthropic foundations, and their consequent influence and reach, this type of organisation (1st tier NGO) merits particular attention. Of the 35 foundations identified, table 2.4 provides a brief description of eight considered to be more important to the seafood sector.
- Based on a review of publicly available information, these eight foundations provided around £124m towards seafood related issues in 2014 alone. This was directed to a 2nd tier of active NGO type organisations (consultancies, industry associations, seafood related NGOs, educational establishments), and financed an estimated 386 projects operating nationally and internationally.

The resources below (Table 2.4) are directed to longer term priorities of the foundations in production, the industry chain, and consumption (see Figure 2.4 & 2.5/Appendix 4). Briefly these are:

- **Packard:** fisheries governance, marine reserves, fostering sustainable markets.
- **Moore:** reforming fisheries management, fostering markets for responsible fishing and fish farming.
- **Walton:** market demand for sustainably caught fish, giving fishermen an economic stake in the fishery, marine management in priority geographies (including network of MPAs).
- **Pew:** network of global marine reserves (Global Ocean Legacy), improved fisheries governance; ending illegal fishing.
- **Oak:** fisheries management and marine reserves.
- **Omidyar:** advancing human freedom and abolishing slavery in the chain.
- **Fairbairn:** conservation of the sea, coherent food sector.
- **Ellerman:** protecting the seas.

**Table 2.4 Resources provided to seafood related priorities, 2014 and 2015**

Foundation	Location	Resources		Projects	
		2014	2015	2104	2015
The David & Lucile Packard Foundation	United States	£48,328,713	Unavailable	147	Unavailable
The Gordon and Betty Moore Foundation	United States	£27,655,307	£17,869,842	44	27
The Walton Family Foundation	United States	£23,891,234	Unavailable	74	Unavailable
The Pew Charitable Trusts	United States	£13,215,573	Unavailable	69	Unavailable
Oak Foundation	Switzerland	£8,434,135	£11,625,890	27	21
The Esmee Fairbairn Foundation	United Kingdom	£1,619,822	£1,701,830	15	10
John Ellerman Foundation	United Kingdom	£512,600	£395,751	6	5
Omidyar Group Foundation (Humanity United) via Freedom Fund	United Arab Emirates	£115,958	£1,038,944	4	18
<b>TOTAL</b>		<b>£123,773,341</b>	<b>£32,632,256</b>	<b>386</b>	<b>81</b>

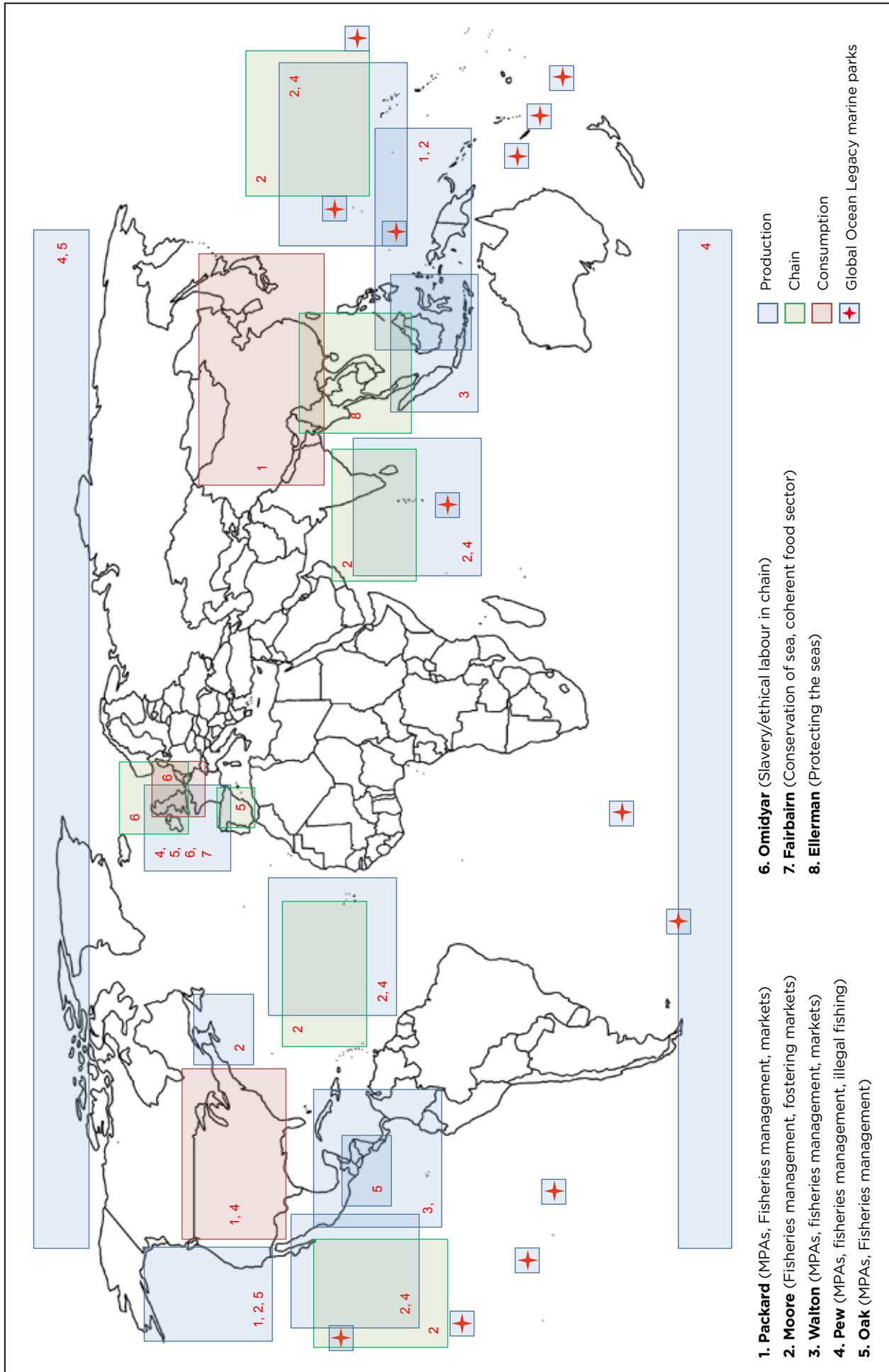
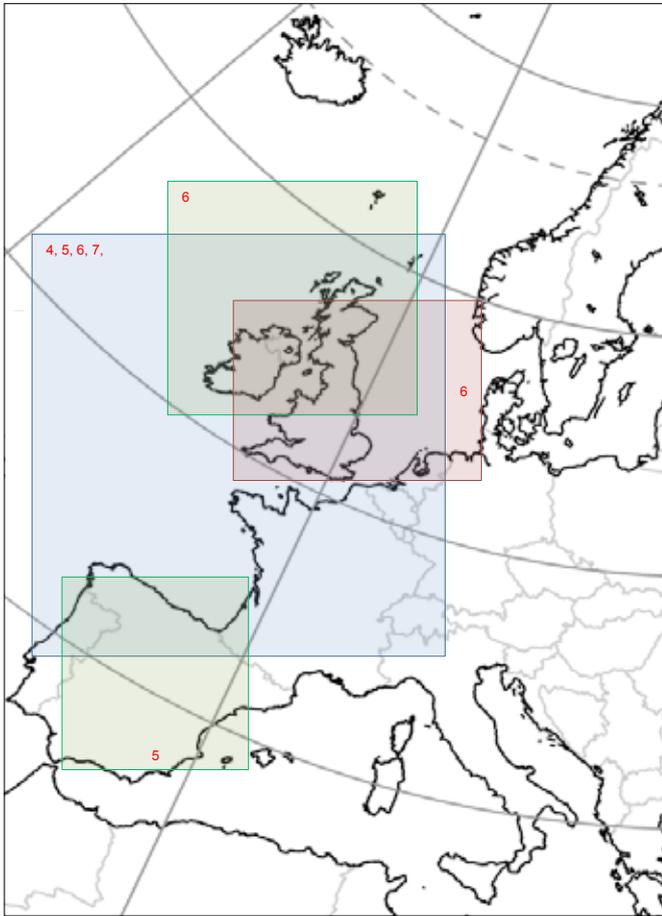


Figure 2.4 Regional focus of philanthropic foundations with an interest in marine and seafood practices (global)



**Figure 2.5** Regional focus of priorities for philanthropic foundations with an interest in marine and seafood practices (Europe/North-East Atlantic)

Beyond the foundations, a number of prominent 2nd tier NGOs also have longer term priorities relating to production, the industry chain, and consumption (Appendix 4). In some cases these NGOs align with, and receive resources from, foundations. For example:

- **Greenpeace:** marine reserves, ending unsustainable fishing.
- **World Wildlife Fund:** eliminating illegal fishing, transforming seafood markets, Arctic conservation.
- **Nature Conservancy:** improving fisheries management, expanding ocean protection.
- **Marine Stewardship Council:** MSC fishery certification, traceability, branded products.
- **Sustainable Fisheries Partnership:** fishery information and fishery improvement projects.
- **Environmental Defense Fund:** supporting secure rights to fisheries for fishermen.
- **Client Earth:** policy implementation, supporting consumer choice for sustainable seafood.
- **New Economics Foundation (UK):** sustainable fisheries, successful food systems.
- **Marine Conservation Society (UK):** establishing MPAs, sustainable fisheries, effective marine planning.
- **Wildlife Trusts (UK):** MPAs, sustainable fishing, marine planning.

### 3. Drivers and risk developments influencing NGO priorities – the long view

This chapter summarises the main drivers and risk developments relevant to NGO priorities over the long term. This draws on developments that are both observed (by 3rd parties) and experienced (by industry operators).

Table 3.1 shows the long view of drivers and risk developments affecting seafood consumption, experienced or observed in the period 1997-2008 through to those anticipated in 2019-2029.

Important developments affecting the NGO landscape in the longer term include:

- **Economic developments:** squeezed government spending and reduced disposable income is likely to reduce the resources available to NGOs through public funds or private donations (potentially increasing the influence of foundations).
- **Trade developments:** increasing diversity in raw material sources and transformation, much

beyond the UK, increases pressure for, and less influence over, ‘governance’.

- **Population developments:** ageing UK population may reduce the number of bequests NGOs receive, particularly after the current wealthy cohort passes on and is replaced by poorer individuals, reducing resources available (potentially increasing the influence of foundations).
- **Increased scrutiny/regulation:** greater demands for transparency will drive greater openness and consistency in values, actions and impacts of actors in the NGO landscape. Increasingly unstable/fragmenting political units create uncertainty in taxation/funding available to, particularly smaller, NGOs (potentially increasing the influence of foundations).
- **Growing media influence:** social media and corporate relations platforms (e.g. Body Shop) affecting ‘social licence’ to operate.

Systemic global risk developments, notably food security and climate change, act as multipliers to amplify the above risk developments and their impacts (threats and opportunities).

**Table 3.1 The long view: 1997/2007 – 2008/2018 – 2019/2029**

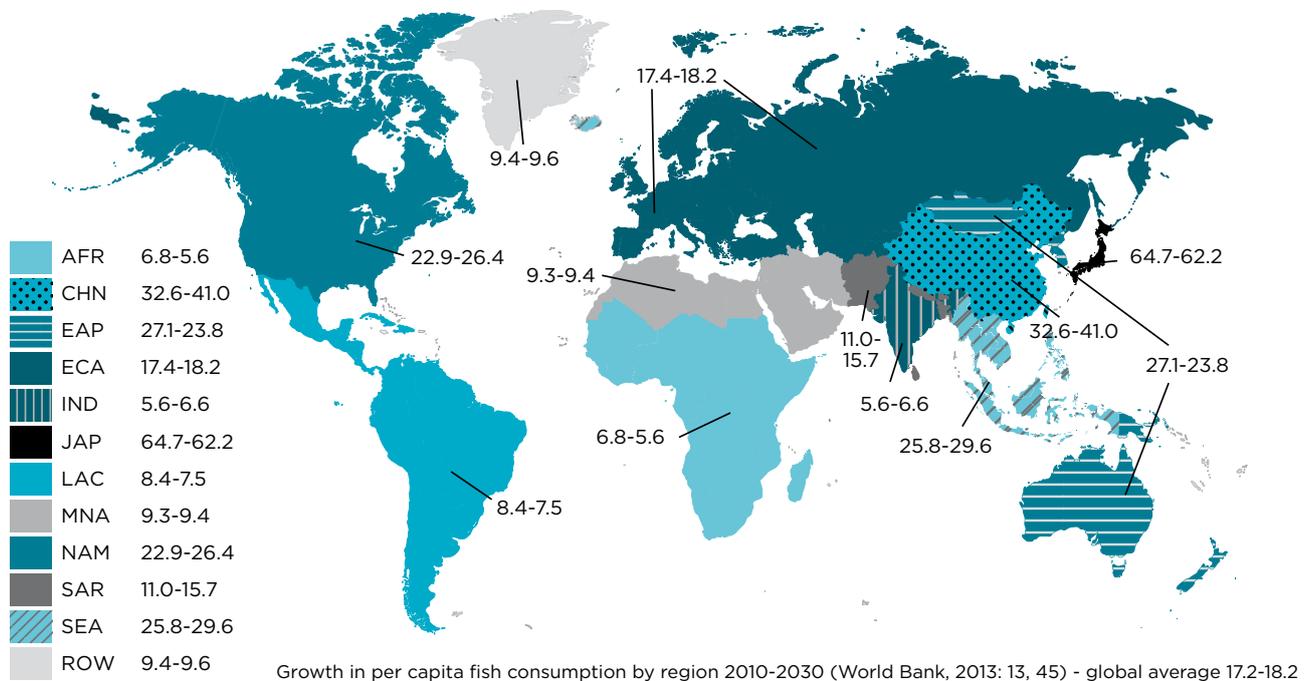
Driver	Risk Development	
	From	To
Economic developments	UK economic growth, with premiumisation convenience and added value products	Limited economic growth, expanding overseas markets with greater focus on convenience and added value products
	Constrained supply in traditional supplies with opening up of new supply sources	Broadening of species and supply sources with traditional supplies potentially constrained
	Expanded middle - ‘we’re all middle class now’ (disposable income/debt increasing)	Squeezed middle in developed economies (low wage economy, reduced disposable income)
Trade developments	Sporadic supply disruptions in producing countries	Competitive pressure to secure supply, more processing in third countries (outside UK control)
Population	Growing UK population, globalisation, tourism	Growing population that is diverse and ageing
Scrutiny/regulation	Increasing scrutiny (exposing practices in industry)	Increasing scrutiny (exposing practices in NGOs AND industry)
	Relatively stable political units give certainty on tax/funding	Changing political units increase uncertainty on tax/funding arrangements
	Broadening, and constructive, stakeholder input into marine policy	Marine policy, evidence collecting, stakeholder engagement fragmented/weakened
Media influence (Incl NGOs)	Emergence of celebrity chefs	Influence of social media (trusted advocates)
	Corporate relations platforms	Combined social media, corporate relations platforms and importance of ‘social licence’

### 3.1 Food security

The main aspects of food security are: a globalised economy; global population increase; and global availability of raw material. Projected economic growth, growth in population (and middle class income), and changing tastes and diets in regions around the world suggest:

- A world economy rebalancing towards Asia.
- An expanding global middle class (squeezed in developed countries).
- Increased protein consumption with regional differences, regions in which per capita fish consumption (Fig 3.1):

- high and predicted to grow strongly (China, South East Asia and North America)
- high and predicted to grow weakly (East Asia and Pacific, Europe and Central Asia, Japan)
- Global fish production expected to increase, based on:
  - wild capture having zero growth with aquaculture expanding at a declining rate.
  - concentration in Asia (particularly India, South East Asia and China) driven by species amenable to aquaculture (prawn, salmon, tilapia, carp and pangasius).



**Figure 3.1** Projected growth in per capita fish consumption by region, 2010-2030 (kg/person/year). World Bank (2013:13,45)

## 3.2 Climate change

The main physical climate change impacts of interest to industry are:

- Sea level rise and extreme water levels.
- Changes in storms and waves.
- Changes in temperature.
- Ocean acidification and de-oxygenation of sea water.
- Changes in terrestrial rainfall (i.e. through surface flooding of land-based infrastructure, plus its role in transferring water, contaminants, and pollutants from land to sea).

The two main climate change drivers that lead to priority risk developments for wild capture seafood are *increased storminess and waves* and *air or sea temperature change*. In shellfish an additional driver is *changes in rainfall/land run-off*. For whitefish and pelagic fisheries, this has contributed to changing distribution of target species (as some traditional species may move away and warmer water species move in) whilst in shellfish fisheries there are changes in the prevalence of non-native species/jellyfish. In all fisheries, offshore operations will be impacted with challenges to safe working conditions and gear deployment/performance.

Climate change may also have implications for aquaculture supplies, especially those originating in estuarine areas. There may be impacts from *increased storminess and waves, air or sea temperature change, changes in rainfall/land run-off, and acidification*.

Onshore, the above risk developments are compounded by *sea level rise and extreme water levels*. This can give rise to impacts affecting onshore operators:

- Damage to site infrastructure (port & processors).
- Integrity of electricity supplies.
- Transport distribution (including ferries).
- Integrity of housing and reduced employment.

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## 4. NGO priorities – recent and anticipated developments, impacts and response

Given the drivers and longer term developments set out in the previous section, this chapter identifies the recent and anticipated NGO risk priorities. These are described as they relate to NGO roles in production, seafood chain and consumption. The chapter concludes with examples of industry impacts and a list of action areas suggested by way of response (given the limited scope of this review – see p2).

- The seafood industry shares a common interface with NGO priorities relating to: advocacy; expertise; management; watchdog; and enablers. Foundations influence this interface by funding a considerable array of NGO activity, much of which has global reach.
- The nature of this interface is briefly explored by reviewing foundation activity in 2014. Recently completed investment projects indicate the contribution made by philanthropic foundations to seafood production related activity within the NGO landscape (recent developments). The stated priorities of foundations and their new and partially complete investments provide a pointer to issues of importance in the NGO landscape over the next few years (anticipated developments).

### 4.1 Production

#### 4.1.1 Recent developments

- **International context:** A relatively small number of foundations (Oak, Pew and Packard particularly) have led recent investment in global **advocacy** in production. Advocating controls on industry practice Oak, Pew and Packard have invested to improve fisheries management; Oak in capacity building of native leaders in the Arctic region, Pew and Oak improving fisheries management in the North East Atlantic – see below, Packard investing in Western and Eastern Pacific fisheries, while Pew campaigned for Krill conservation in the Antarctic. Packard has also supported bird conservation; seeking to mitigate seabird by-catch and explore how shrimp farming can support foraging for example. Pew and Oak have pushed for greater ocean protection and reduced access to the resource with a global drive for marine protected areas (MPAs) via Global Oceans Legacy - a coalition of several foundations looking to establish 15 great marine parks by 2022. Examining the condition of the

resource/product integrity has also featured with Oak sponsoring solutions and support to counter the emerging issue of micro-plastics.

- Investments have also been made in **expert activity** focussed on supporting policy cycles and decision-making; Pew has done this through the sponsorship, and broad placement, of Research Fellows to improve ocean conservation and management whilst Packard have provided support for scientists engaging with policymakers and other stakeholders. Pew and Packard have also invested in **watchdog activity** that contributes to policy cycles and decision-making (for example ending illegal fishing through certification (Packard) and improved vessel monitoring (Pew)).
- **Domestic context** (UK and North East Atlantic): The **advocacy** focus of these foundations is also reflected in UK and European production, augmented by smaller scale investments from UK-based Fairbairn and Ellerman foundations. Advocates for controls on industry practice included fundamental reform of the EU Common Fisheries Policy (CFP), with Pew building a coalition of 193 groups (via the likes of the Oceans2012 campaign and fishsubsidy.org) and Oak providing support for legal analysis of policy responses e.g. of the control regulation in Spain. In the UK, Fairbairn supported the voice of the more artisanal inshore fishing fleets in the face of large-scale industrial fleets via Greenpeace and NUTFA (New Under 10m Fishermen's Association). Amongst advocates providing commentary on practice (policy/industry) was Hugh's Fish Fight campaign to highlight discarding practices (sponsored by Oak), and the Shark Trust highlighting the impacts on other marine species (sponsored by Ellerman). In addition, amongst those pursuing limited access to the resource the UK partnership of 47 Wildlife Trusts were supported by Fairbairn in making the case for the 'Living Seas' vision. This vision includes establishing MPAs, reducing marine industry impact, and improvements to legislation and policy.

#### 4.1.2 Anticipated in next five years

- **International context:** More recent investments reveal a greater number of foundations (Oak, Pew, Packard, Moore and Walton) to be engaged in funding global **advocacy** in production. In general, attention appears to be gravitating around broad eco-regions e.g. Arctic, Western Pacific, etc (see Fig 2.4). Investment focussed on controls on industry practice centres on improving governance in those fisheries already engaged – North West Atlantic, Eastern Pacific, Western Pacific and

promoting ways in which this might be done e.g. adopting ecosystem approaches and multi-stakeholder management (Pew, Moore, Oak, Packard), providing economic incentives to fishermen (Walton), and a pivot towards Asia in an effort to expand the certification of fisheries in this region (Packard). Pew and Oak are advocating multi-stakeholder, ecosystem-based, marine management in the Arctic where warming temperatures and a melting ice cap are prompting industrialisation of an increasingly accessible region. A continuing priority for Global Ocean's Legacy is limiting access to the resource through advocacy of, and the development of a legal instrument to achieve, large scale networks of marine reserves or MPAs on the high seas. Reserves are being supported in the Arctic region (Pew, Oak), Eastern Pacific (Pew, Oak, Walton), Western Pacific (Pew, Packard, Walton), and the Indian, South Atlantic and Southern oceans (Pew). Examining the condition of the resource/product integrity (further investment in the issue of micro-plastics) remains a smaller but important investment.

- There also appears to be greater engagement in **expert, manager** and **watchdog** activity. This is perhaps the result of earlier issues maturing, and the emergence of new challenges arising from agreed responses and their implementation.
- Investment in expertise supporting policy cycles and decision-making includes, for example, sponsoring improved data management in fisheries (Moore) and research on socio-economic impacts of MPAs (Oak). Expertise supporting consumer/business decision-making attracted investment in certification and traceability in order to propagate responsible fishing and fish farming – for example in pelagics and shellfish (Moore).
- Sponsorship of manager/watchdog activity is focussed on management conditions and oversight, particularly in the North East Atlantic and the implementation of the CFP by Pew and Oak (see below). Complementing this is investment in watchdog activity as a means to input into policy cycles and decision-making for example monitoring compliance in relation to the CFP to end overfishing, and IUU legislation to end illegal fishing (Pew/Oak). To advance the latter, support is being provided for a global database of fishing vessels (allowing enforcement agencies and other stakeholders to access the identity and history of a fishing vessel, regardless of changes in name, ownership or flag registry). Additional watchdog efforts include enforcing

policy response through legal action. Examples include the protection of salmon in the North Eastern Pacific (Moore), and in taking legislative positions against the offshore oil industry in East Central Pacific (Oak).

- **Domestic context** (UK and North East Atlantic): The foundation priorities in an international context continue to have a degree of reach into the UK and Europe, enhanced by investments from UK based Fairbairn and Ellerman foundations. Pew and Oak have invested in **manager/watchdog** activity centred on policy cycles and decision-making (particularly the implementation of the EU Common Fisheries Policy). Pew have prioritised setting fishing limits (that will end overfishing by 2015 where possible and 2020 at the latest) and establishing multi-annual plans for fisheries management. Oak are supporting activity in several EU countries to ensure the new elements of the CFP are tried and tested and economic arguments are made. Investment has also been directed towards watchdog activity with Fairbairn, for example, looking to ensure marine legislation is effective and investing in the capacity for NGOs to launch legal action as a means of achieving this (via Client Earth).
- The priorities of the Ellerman and Fairbairn foundations in the marine environment have tended to remain focussed on **advocacy**. This includes localised controls on industry practice with Fairbairn investing in sustainable fishing with smaller/inshore vessels, and supporting a model for sustainable and equitable management of marine resources for the Lyme Bay reserve (via Blue Marine Foundation). Support for limiting access to resource continues with investment in those advocating for a network of MPAs in UK waters (the Wildlife Trusts and a coalition of UK 'Link' organisations) or in specific locations e.g. in the Clyde estuary or in the Western Isles). Advocacy concerned with commentary on industry practice also features but to a lesser extent (for example understanding the damaging fishing impacts of inshore fishing in Scotland).

## 4.2 Seafood chain

### 4.2.1 Recent developments

- **International context:** A number of foundations (Omidyar particularly) have led recent investment in global **advocacy** in the chain. In support of commentary on industry practice, and the advancement of ethical labour practices, Omidyar has invested in the development of a Global Modern Slavery Directory and outreach (via Polaris) as well

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as initiatives to mitigate and prevent modern slavery (via the Ethical Trading Initiative). Advocacy of controls on industry practice includes targeted investments by Omidyar in the regional hotspot of Thailand and South East Asia; this includes initiatives engaging Thai seafood supply chains to identify and address risks of trafficking and forced labour (via Issara Institute) and supporting stranded fishermen on Indonesian Islands (via Labour Rights Promotion Network Foundation). Foundations have also invested in improving the sustainability of seafood product chains, Packard for example, has invested in supply chain oriented fisheries improvement projects (via Sustainable Fisheries Partnership).

- Investment in **expertise** in the chain to support consumer/business decision-making centres on the development of business-to-business tools to support improved business practice. Recent investments by Omidyar focus on the inclusion of social issues within responsible seafood sourcing (via Fishwise), whilst Packard & Oak have sponsored tools to support the sourcing of sustainable products for buyers (via the likes of Sustainable Fisheries Partnership and FishChoice). Omidyar has also supported **watchdog** activity to support consumer/business decision-making addressing issues of slavery and human trafficking by investing in assessment of existing law (via Liberty Asia) and examining the potential for strategic litigation and legal initiatives (via Human Trafficking Pro Bono Legal Centre and Thomson Reuters Foundation).
- In support of **enabler** activity directed towards projecting influence, the likes of Packard have invested in the Seafood Summit global conference. This conference provides an international platform for actors engaged in the NGO landscape and acts as a ‘multiplier’ for those looking to communicate specific and shared agendas.
- **Domestic context** (UK and North East Atlantic): The priorities in an international context have some reach into the domestic context, but the focus on the chain amongst UK based foundations has been a concern for a more coherent food system. In this regard, Fairbairn has invested in **advocacy** (particularly commentary on industry practice) and **expertise** (to support policy and consumer/business decision-making) oriented around sustainable consumption and production in the food chain. A number of initiatives have been supported, including a food research hub enabling collaboration across academia/ food sector/ community (via City University), the Food

Foundation, the Virtual Food Academy, the Sustainable Food Trust, and Nourish Scotland.

#### 4.2.2 Anticipated in next five years

- **International context:** More recent investments reveal continued focus on funding global **advocacy** in the chain. In supporting commentary on industry practice Omidyar maintains a focus on Thailand and SE Asia investing to address issues of human trafficking, forced labour and migrant rights (via Human Rights Watch), and investigating and gathering evidence (via Environmental Justice Foundation). Omidyar also sponsors controls on industry practice regarding slavery and trafficking by encouraging businesses to conduct operations with greater transparency across the supply chain (via the Alliance to End Slavery and Trafficking), and pressuring governments for changes to support transparent supply chains (via the International Labour Rights Forum). Foundations continue to invest in improving the sustainability of seafood product chains with the likes of Oak, for example, investing in supply chain oriented fisheries improvement projects (via Sustainable Fisheries Partnership). Omidyar is also investing in **expertise** in the region to support consumer/business decision-making through the development of risk scores for forced and trafficked labour in Thai seafood (via the Sustainability Incubator). Recent investments in **watchdog** activity to support consumer/business decision-making include Omidyar sponsorship of transparent supply chains and the development of legal tools to fight slavery. The former includes support for frontline reporting ethics to investigate global supply chains (via Transparentum) and the resourcing of an online Labour Exploitation Accountability Hub to house national laws and regulations on individual and corporate accounting. The latter includes strengthening the provision of legal support, for example by increasing litigation in the human trafficking arena (via Human Trafficking Pro Bono Legal Centre).
- In support of **enabler** activity aimed at projecting influence, Packard is seeking to attract new investments in the supply chain (particularly in Asia) and more widely, looking to increase the share of wild caught seafood engaged in credible fishery improvement projects (FIPs). Moore is supporting a core coalition to promote sustainable supply chains globally to transform the markets for top traded commodities (including tuna and prawn) by changing purchasing practices and setting and strengthening standards.
- **Domestic context** (UK and North East Atlantic):

The priorities in an international context continue to have some reach into the domestic context, but the focus on the chain amongst UK based foundations remains Fairbairn's concern for a more coherent food system. Fairbairn has invested in **advocacy** (particularly *commentary on industry practice*) and **expertise** (to support *policy and consumer/business decision-making*) oriented around sustainable consumption and production in the food chain. This includes support for awareness-raising around key issues to influence policy and practice nationally and international (via the Food Climate Research Network), support to tackle poverty through civil society coalition-building and contribution to Scottish food policy (via Nourish Scotland).

## 4.3 Consumption

### 4.3.1 Recent developments

- **International context:** Recent investment by foundations relate to global **expertise** and **watchdog** activities that can support *consumer/business decision-making*, often with the goal of creating a market for sustainable seafood products. These activities are therefore oriented towards market outlets and consumers. Perhaps the most high profile, and successful, has been the investment made by the likes of Packard and Oak in the certification of sustainable fisheries (and branding of associated seafood products) by the Marine Stewardship Council. This has been hugely successful with a clamour from outlets for MSC certified fish. It has been a huge success to raise the issue, get the industry to respond and focus on their supply chains. Investments have also been made by the likes of Packard in organisations such as Monterey Bay Aquarium who produce consumer guidance in the form of Seafood Watch. Foundations such as Oak have also invested in campaigning that aims to reveal both bad and good sourcing practices and encourage leading fish brands and retailers to commit to more sustainable fishing practices (via Greenpeace for example – see below).
- **Domestic context** (UK and North East Atlantic): The focus of these foundations is also reflected in UK and European consumption, augmented by smaller scale investments from UK-based Fairbairn foundation with a concern for a more coherent food system through sustainable consumption.
- Investments by Fairbairn in **advocacy** support *commentary on policy/industry/consumer practice* focus on the consumer with the sponsorship of a campaign to influence policy, practice and behaviour around meat consumption (via the Eating Better initiative

and WWF), an independent cross-party inquiry into food poverty (via the Fabian Society), and the development and testing of a new Food for Families programme to help support skills and confidence in families on a tight budget (via the Children's Food Trust).

- Investments in **expertise** and **watchdog** to support *consumer/business decision-making* include Oak and Pew contributions to the Marine Conservation Society who produce sustainable seafood advice in the form of the Good Fish Guide (including fish to eat and fish to avoid lists). The types of exposé campaigns supported by Oak that seek stakeholder commitment to more sustainable fishing practices have been demonstrated in the past in UK retail. Nearly ten years ago, Greenpeace ranked UK multiples performance by fish sustainability combined with direct action on supermarket roofs directly affecting shareholder and consumer sentiment. In the context of more recent developments, Greenpeace campaigning launched a tinned tuna league table highlighting brands that used destructive fishing methods and taking direct action (returning canned tuna to retail outlets UK wide). Investments by Fairbairn include a campaign for the removal of shark and shark-related products from UK supermarkets, shops, and restaurants (via Bite-Back Shark and Marine Conservation), the introduction of food waste audits in the retail sector (via This Is Rubbish), and developing the University Green League whereby universities are ranked according to environmental and ethical performance – including sustainable food elements (via People and Planet).

### 4.3.2 Anticipated in next five years

- **International context:** A number of foundations show continuing investment in global **expertise** and **watchdog** activities to support *consumer/business decision-making*. This includes specific investment from Packard and Oak into Monterey Bay Aquarium (that operates Seafood Watch), Packard promoting sustainable seafood in Japan & China and, more generally, Walton working with retailers to create economic incentives for ocean sustainability. Meanwhile, Pew is investing in research to explore the health and safety aspects of food in the USA.
- **Domestic context** (UK and North East Atlantic): The focus of these foundations is likely to influence UK and European consumption, augmented by smaller scale investments from UK-based Ellerman and Fairbairn given the latter concern for a more coherent food system. Fairbairn investments in **expertise** and **watchdog** to support *consumer/business decision-making* include expanding the

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campaign for the removal of shark from UK supermarkets, shops, restaurants to include other threatened fish species (via Bite-Back Shark and Marine Conservation). Investment in **manager** activity includes *providing alternative routes for industry practice* through innovative platforms to match consumers in need and those with perishable food surpluses (via Plan Zheroes social network platform) and the Ellerman financed 'Sustainable Fish Cities' programme developing sustainable fish in the food service and supply sector via Sustain.

In summarising the anticipated developments identified in this review, we might expect to see NGOs focus on a number of key areas in the near future (next five years):

- **Production:** ghost fishing/microplastics, MPAs, impact of aquaculture practice, implementation of CFP, and more nuanced positions on the merits of industrial and artisanal inshore fisheries
- **Seafood chain:** certification, slavery, IUU fishing
- **Consumption:** New food alliances

This will give rise to a number of potential impacts (either opportunities or threats), briefly considered below.

## 4.4 Example impacts and response

### Advocate

- Condition of resource: micro-plastics, and other campaigns, are an opportunity to highlight risk to the resource. However, unsubstantiated claims could unfairly penalise industry by undermining product integrity and industry reputation.
- Access to resource: more campaigning on MPAs internationally (in Arctic and Pacific regions) and domestically (around the UK). Opportunity to improve fisheries management but could restrict fishing opportunities, raising questions over *special interests* and *appropriateness*.
- Controls on practice: social media driven campaigns. Opportunity for industry engagement and design of practical policy options. However, campaigns with inadequate industry response, can have substantial impact leading to poorly designed policy with questionable *legitimacy*.
- Commentary on practice: campaigns, such as seal culling in aquaculture or electric fishing. Opportunity for industry to work with communities on specific practices, however campaigns can lead to boycotting of outlets and products.

### Expert

- Policy-cycle and decision-making: NGOs are head-hunting influential/knowledgeable figures<sup>2</sup>. Opportunity for closer NGO/industry dialogue and more informed policy positions. However, in some situations, this could lend credibility to (potentially flawed) perspectives. Meanwhile, the placement and embedding of NGO staff in stakeholder organisations can mean activity is, or seen to be, *servicing special interests*.

### Manager/Watchdog

- Policy-cycle and decision-making: Oversight on policy implementation provides opportunity of additional resource during 'austerity' conditions. However, litigation minded NGOs, focussed on policy implementation, risk fisheries being placed into 'emergency measures' raising questions over appropriateness (of promoting a litigation culture as a way of resolving issues in the UK for example).
- Consumer/business decision-making: Fishery improvement projects provide a valuable mechanism for stakeholder collaboration and potential action. However, pressure to introduce fishery improvement projects may result in 'top down' approaches to effecting change in supply chains as NGOs pressurise multiple retailers. However, as this is a resource intensive exercise, industry may be left covering the costs and, in the case of fishery management, paying for conditions outwith the client control: raising questions of NGOs *servicing special interests*.

### Enabler

- Projecting influence: key issues of concern to industry may have insufficient 'industry lead' leaving responses *servicing special interests* (with industry operators having to deal with the consequences). Past activity in the NGO landscape has seen industry left behind; examples include early Seafood Summit conferences (industry 'on the table' rather than 'at the table'), and the runaway impact of Hugh's Fish Fight. Positive examples includes recent ethics work and there may be opportunities with product integrity, food security etc. A further impact, rather more opaque, is the reach and level of influence wielded by a relatively small number of foundations raising questions of *legitimacy*, *appropriateness* – and with inadequate transparency – questionable *operation*.
- In responding to the developments confronting UK industry in the next few years, a number of suggested actions are shown in Table 4.1.

**Table 4.1 Suggested actions in response to anticipated developments (partially completed, given review scope)**

Dimension	Anticipated developments	Sector(s)	Suggested action	Owner*
Advocate	Condition of resource/ product integrity			
	Access to resource			
	Controls on industry practice	Production	Central calendar for listing policy events	
	Commentary on practice			
Expert	Policy-cycle and decision-making	All	Central calendar for publication schedules	
		Production	Lead person for oversight on policy and policy-cycles	
	Consumer/ business decision-making			
Manager	Management conditions and oversight			
	Providing alternative routes for practice			
Watchdog	Policy-cycle and decision-making			
	Consumer/ business decision-making			
Enabler	Providing alternative perspectives	All	Industry needs to work more closely with the NGO community and create and shape its own NGO lobbying voice or opinion.	
	Projecting influence	Production	Promote positive domestic fisheries, challenge NGOs on consequences of campaigning e.g. Fish Fight	
			Explore common ground with appropriate NGOs (particularly those that are financially constrained)	

\*to be agreed

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## 5. The next NGO priority – impacts and response to longer term developments

This review suggests that over the longer term, priority issues of concern appear to follow a maturity pathway. As issues mature they move from a 'contested arena' towards an 'agreed problem area'; this involves a change in NGO focus as well as role.

- In terms of focus, foundations (and some larger NGOs) are moving their advocacy out of mature issues into new emerging issues. This is rooted in their orientation (a search for impact, collaboration or maintaining high profile) and access to resource. For example foundations are beginning to focus on large eco-regions and pivoting towards Asia, whilst WWF are shifting their focus away from the UK to a more global situation as stocks in the domestic context improve. This has an impact on the UK as industry operators (including Seafish) are less able to influence NGO activity overseas.
- In terms of role, active NGOs are broadening or shifting roles from advocating towards managing/experts/watchdog. This change can be achieved in different ways, for example through:
  - Bought-in expertise: either by head hunting experienced individuals or the availability of high skilled individuals - NGOs in the USA offer MBA and legal qualified professionals viable career paths for example (e.g. Turner, 2010)
  - Collaboration and coalition building: this again requires key skillsets in facilitation, interpretation etc.

As a consequence we might expect to see some NGOs beginning to specialise in particular areas of expertise, others building coalitions and still others acting as wildcards pursuing radical single issue campaigns. This may be amplified by longer term economic and population trends which are likely to place a greater strain on NGO resources (particularly smaller NGOs). We might expect foundations, with substantial resources, to have increased influence.

Finally, we might expect the trend towards increased scrutiny to place greater demands on NGO transparency. As with NGOs more generally (see section 2.2.1), the activity of seafood related NGOs can be positive but is not without criticism. The evidence and consultations in this review suggests:

- There is a governance dilemma in seafood industry practices; keenly felt in this particular sector given that fish swim, products are traded, and impacts are felt, across jurisdictions. This gives rise to market failures (perceived or real) and government failure to act. Solutions to these problems are resolved competitively or collaboratively but rarely imposed. This creates space for NGOs and debates over governance arrangements.
- There is a level of conflict where the values and principles promoted by international NGOs can challenge local interests.
- The roles played by NGOs can, at times, be questioned in terms of their legitimacy; interests served; appropriateness; independence; and operation (see section 4.4).

The impact of longer term developments on NGO activity is multiplied by longer term food security and climate change challenges:

- The challenge of food security, a growing world population and middle class offers opportunities for protein suppliers in an enlarged global market but also the considerable challenge of intensified competition and pressure on production systems. Longer term trends suggest global demand growth will increase meat prices, including fish (with the projected changes dependent on how aquaculture develops).
- The challenge of climate change brings additional uncertainties to the seafood industry. The industry may be directly impacted by disruptions to the fish resource, as well as the catching/harvesting, onshore handling and distribution activities. This will directly affect availability. Climate change may multiply demands for ocean protection amplifying campaigns for MPAs (as a means to mitigate climate change). – see Paris climate change conference. There may also be indirect impact if other protein sectors are disrupted. Finally, discussions in some policy circles are already suggesting that beyond health reasons our appetite for meat is a climate change driver. Dietary change, and reduced meat consumption, is advocated as a means of mitigating climate change. Recommendations include, amongst others, government intervention and the need for a national debate on meat overconsumption. In seafood there are calls, at a global level, for marine protected areas in order to mitigate climate change.
- The challenge of food security and climate change could mean these are pushed further up political agendas and placed more centrally

in NGO priorities. On this basis we might expect both challenges to broaden NGO focus on industry practice by:

- Intensifying current focus on production and well managed marine environments. Increased population, globalisation, competition for scarce resources, technological advances for operating in deep water, as well as military interests are increasing demands on, and control over, marine resources (food, energy, minerals - aggregates as well as high value rare earths and precious metals).
- Drawing attention to consumption and food disposition i.e. what seafood is being consumed where and by whom. Attention could be directed towards disposition and controversies associated with this. Controversies exist in a domestic context (e.g. growth in food banks, food poverty etc) as well as an international context (e.g. developing countries having a high share of fish in their diets, allocating this resource to export and/or selling the rights to fish).

Food security and climate change therefore aggravate existing challenges in the seafood related NGO landscape, particularly in an international context. As such we might expect opportunities and threats to arise from heightened NGO activity, particularly **advocacy** roles concerned with *control on the resource, access to the resource, commentary and controls on practice* and **enabler** roles concerned with *projecting influence*. The Moore foundation announcement (24 March, 2016) to support a coalition to transform supply chains globally is the most recent evidence of this.

The industry and Seafish have a choice as to whether or not to respond to this emergent landscape at this stage. Responding could involve a range of proactive steps initiated in advance. Deciding not to respond at this stage would mean industry and Seafish are subject to events as they unfold, requiring strong capabilities to react quickly (there is evidence that this can be an area of industry/Seafish weakness). If there is an appetite to respond at this stage, this review exercise has highlighted the following conclusions and requirement:

- **Seafish tends to be engaged in advocacy, expertise and manager roles (oriented towards the provision of tools) rather than the enabler role (oriented towards providing perspectives and projecting influence).** Orientation towards the provision of tools centres on advocating specific initiatives, delivering expert opinion on agreed *problems*

(e.g. the Landings Obligation) and managing deployment of tools (RFS and RASS for example). There is more limited activity in the enabler type role which would involve advocating specific opinions/interpretations on emerging issues, building and facilitating coalitions and networks, and projecting influence. Although there may be structural reasons why this orientation exists - prevailing skillset, UK remit, restrictions on lobbying etc - nonetheless the Seafish position in the landscape, and the associated advantages and drawbacks, should be recognised.

- **Keep a watching brief on the seafood related NGO landscape, and consider which roles (including the enabler role) Seafish could usefully play to best support industry.** If Seafish is to engage further in the NGO landscape generally, and with foundations in particular, there is a need to 'think global and act local'. This is an initial investigation into 1st tier actors (enablers) focussed on higher-level questions. If this framework is useful then consider:
  - Refining and maintaining a view on the seafood related NGO landscape. Particularly maintaining the list of NGOs and a 'watching brief' on the actions of actors in the 1st tier (enablers) and 2nd tier (activists).
  - Understanding NGOs in the 2nd tier (activists) in more detail and identifying industry implications (opportunities and threats).
  - The role(s) Seafish could usefully play in terms of a supporting and/or leading capacity along with the skillset required to fulfil these.

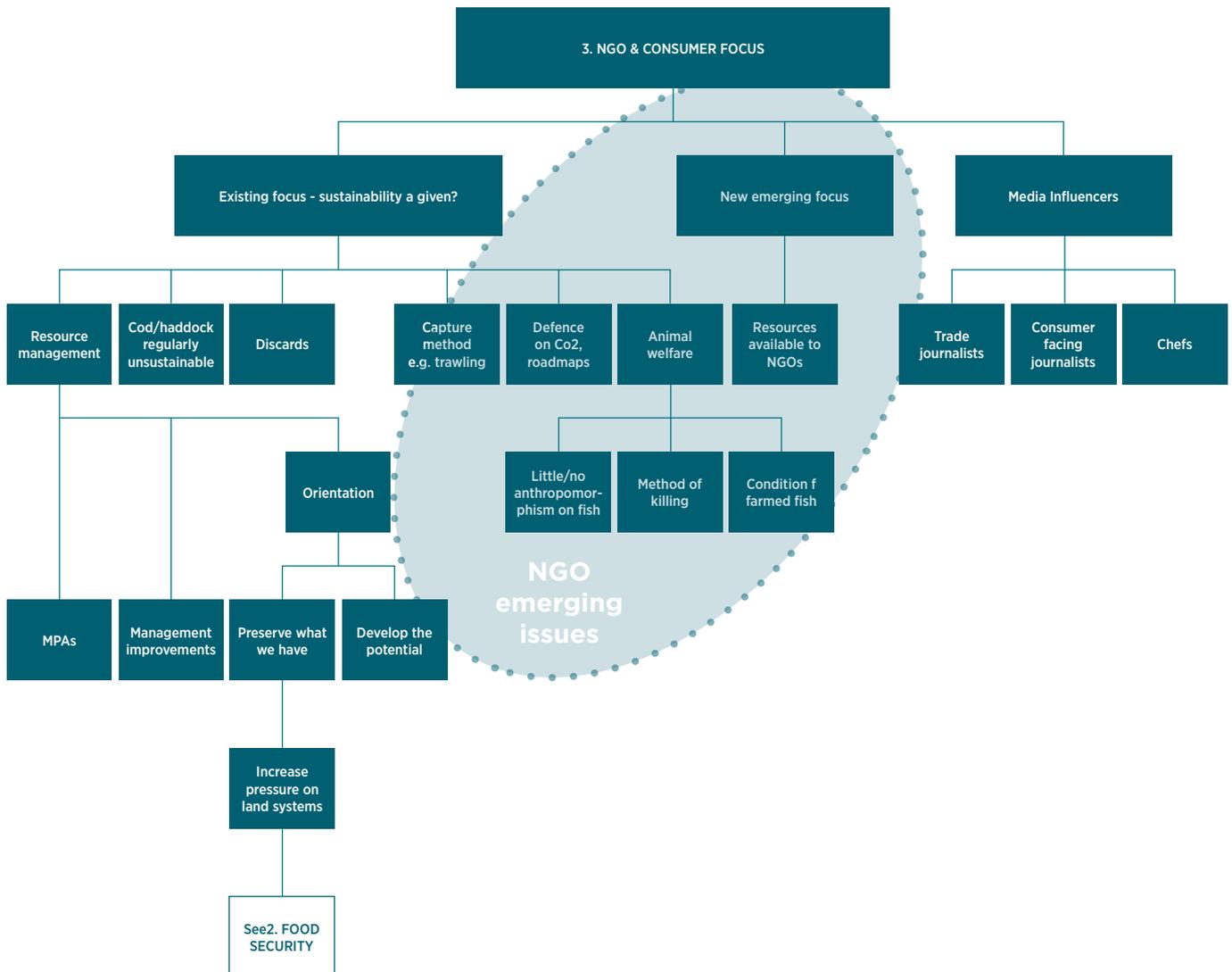
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## Appendix 1 - Locating NGO priorities in seafood risk landscape



## Appendix 2 - Consultees

1. **Kara Brydson**  
*Seafish*
2. **Karen Green**  
*Seafish*
3. **Phil MacMullen**  
*Seafish*
4. **Chris Middleton**  
*Seafish*
5. **Tom Pickerell**  
*Seafish*
6. **Paul Williams**  
*Seafish*
7. **Libby Woodhatch**  
*Seafish*

## Appendix 3 – UK seafood industry - main systems, functions and activities

Source: Seafish, Defra

System	Species distribution (and main producing countries)	Source method	Capture method
Domestic	UK waters/NE Atlantic (UK)	Capture	Whitefish & flatfish (bottom trawl)
Domestic	UK waters/NE Atlantic (UK)	Capture	Whitefish (gillnets) Whitefish (minority line-caught)
Domestic	UK waters/NE Atlantic (UK)	Capture	Flatfish & rays (beam trawl)
International	NE Atlantic/Barents sea (Norway, Russia, Iceland)	Capture	Demersal fish (bottom trawl)
International	North Pacific/Bering sea (USA)	Capture	Whitefish (pelagic trawl)
International	South East Asia (Vietnam)	Aquaculture	Freshwater pond culture
Domestic	UK waters/NE Atlantic (UK)	Capture	Small pelagic (purse seine & mid-water trawl)
Domestic	UK waters/NE Atlantic (UK)	Capture	Small pelagic (line caught)
International	Eastern Atlantic (Spain, Morocco) Eastern Pacific (Peru)	Capture	Small-pelagics (purse seine)
International	Indian ocean (Spain/France/Sri Lanka) Pacific ocean (Philippines/ Mexico) Atlantic ocean (Spain/France/ Ghana)	Capture	Tunas (long line) Tunas (purse seine) Tunas (pole & line / handline)
Domestic	UK waters/Eastern Atlantic (UK)	Capture	Crustaceans (pots)
Domestic	UK waters/NE Atlantic (UK)	Capture	Prawn (trawl)
Domestic	UK waters/Eastern Atlantic (UK)	Capture	Molluscs (dredged)
Domestic	UK waters/NE Atlantic (UK)	Aquaculture	Molluscs (rope grown/longlines) Molluscs (bottom grown)
International	North Atlantic (Denmark/ Greenland/ Iceland/ Norway/ Canada)	Capture	Prawn (trawl)
International	Mixed (Eastern Pacific, Mediterranean, North & South Atlantic, Indian ocean)	Capture	Cephalopods (jigging, trawl in North Atlantic)
International	South East Asia (Indonesia/ India/ Thailand), Central America (Ecuador/ Honduras)	Aquaculture	Shrimp farming (intensive > extensive)
Domestic	UK		
International	Asia, Africa		
International	Pacific ocean (USA / Canada / Russia)	Capture	Salmon (nets)
Domestic	UK waters/NE Atlantic (UK)	Aquaculture	Marine cage farming Freshwater ponds/raceways

Transportation	Format and processed form	Species	Broad species grouping
Road, container	Fresh - Whole, fillets/loins, smoked, prepared	Cod, haddock, whiting, monkfish, sole, plaice	Whitefish
Road, container	Fresh - Whole, fillets/loins, smoked, prepared Whole, fillets/loins, smoked, prepared	Cod, haddock, Pollock	Whitefish
Road, container	Fresh - Whole, fillets/loins, prepared	Sole, plaice, rays	Whitefish
Road, container, Air freight	Fresh/Frozen - fillets/loins, smoked, prepared	Cod, haddock, hake, halibut, plaice	Whitefish
Road, container	Frozen - fillets/loins, smoked, prepared	Alaska Pollock	Whitefish
Road, container	Frozen - Whole, fillets/loins, prepared	Pangasius	Whitefish
Road, container	Fresh/frozen (including frozen at sea) - Whole, fillets/loins, smoked, fishmeal, preserved, aqua feed	Herring, mackerel, sardine/pilchard, blue whiting	Pelagic
Road, container	Fresh - Whole, fillets/loins, smoked, prepared	Mackerel	Pelagic
Road, container	Fishmeal, fish oil, canned, aqua feed	Anchovy, sardine/pilchard	Pelagic
Air freight, Container	Fresh/frozen - Whole, fillets/loins, preserved Preserved Whole, fillets/loins, preserved	Tunas (yellowfin, albacore, skipjack, swordfish)	Pelagic
Road, Air freight	Live Fresh/frozen - Whole, prepared	Crabs, lobsters, Nephrops, whelks	Shellfish
Road	Live Fresh/frozen - Whole, shelled, preserved	Nephrops	Shellfish
Road, Air freight	Live Fresh/frozen - preserved	Mussels, scallops	Shellfish
Road, container, Air freight	Live Fresh - preserved	Mussels, oysters	Shellfish
Road, container	Frozen - Whole, shelled, preserved	Northern/cold-water prawn	Shellfish
Road, container	Frozen - prepared, brined	Squid, octopus, cuttlefish	Cephalopods
Road, container	Frozen - Whole, shelled, preserved	Warm-water prawn	Shellfish
		Carp, bream	Exotics
		Kingfish, Parrotfish, Groupers, Snappers	Exotics
Road, container	Frozen - Whole fillets/loins, smoked, prepared	Pacific salmon	Salmonids
Road, container, Air freight	Fresh/frozen - Whole, fillets/loins, prepared, smoked Fresh/frozen - Fillets/loins smoked, prepared	Atlantic salmon, Rainbow trout (NE Atlantic small pelagic, waste and some imported fisheries (anchovy, sardine) input as feed in stage 2)	Salmonids

Source: Seafish, Defra

## Appendix 4 – Longer term priorities of foundations and key activist NGOs

Organisation	Mission	Principles
Packard	To work with partners around the world to improve the lives of children, families, and communities—and to restore and protect our planet.	-
Moore	To create lasting, meaningful change.	Building relationships and funding work that can make a significant impact.
Walton	Creating opportunity so individuals and communities can live better in today's world	-
Pew	Laying the foundation for effective policies and practices by invigorating civic life, conducting research, informing and engaging citizens, linking diverse interests to pursue common cause, and insisting on tangible results.	1. Improve public policy by conducting rigorous analysis, linking diverse interests to pursue common cause and insisting on tangible results;2. Inform the public by providing useful data that illuminate the issues and trends shaping our world;3. Invigorate civic life by encouraging democratic participation and strong communities. In our hometown of Philadelphia, we support arts and culture organizations as well as institutions that enhance the well-being of the region's neediest citizens.
Oak	Commits its resources to address issues of global, social and environmental concern, particularly those that have a major impact on the lives of the disadvantaged.	-
Omidyar (Humanity United)	Empowering people around the world	We are passionate about empowering individuals. We create opportunity for people. Experimentation. Iteration. Progress.

Relevant programmes	Relevant priorities	Relevant targets
<p>The Conservation and Science Program invests in action and ideas that conserve and restore ecosystems while enhancing human well-being.</p>	<p>Oceans: Marine birds; Marine fisheries; Gulf of California; US West coast; Western Pacific (sound fishery governance, durable marine reserves, skills and capabilities)</p>	<p>By 2017, 40% of North American retail committed to sustainable seafood. 15% of global wild caught volume certified or under assessment by MSC, And 10% in a credible FIP</p>
<p>Environmental conservation: Balancing long term conservation with sustainable use. We protect critical ecosystems. We establish models of collaboration that can be replicated and expanded around the globe. We seek to create lasting change in how land, freshwater and coastal marine ecosystems are managed.</p>	<p>Marine conservation: Supporting healthy ocean ecosystems that can sustain food, jobs and recreation over the long term. Developing comprehensive, multi-stakeholder, area plans for marine activities. Reforming fishery management systems to ensure both jobs and fisheries are sustainable. Wild salmon ecosystems: Fostering solutions to sustain the wild salmon ecosystems of the North Pacific. Oceans and seafood markets: Fostering responsible fishing and fish farming as the marketplace norm.</p>	<p>Changing the ways in which people use terrestrial, freshwater and coastal marine ecosystems to conserve critical ecological systems and functions.</p>
<p>Helping environments thrive and communities prosper: A healthy environment drives a strong economy. Around the world we support economic incentives for sustainable resource management, and work towards lasting common sense conservation.</p>	<p>Creating Economic Incentives for Ocean Sustainability (globally): Working with seafood retailers and consumers to make sure that there is a market demand for sustainably caught fish. Supporting efforts to create economic incentives for protecting threatened fish populations (giving fishermen an economic stake in the fishery). Establishing Marine Management in priority geographies (globally); Indonesia (West Central Pacific), Colombia, Costa Rica, Ecuador, Panama (East Central Pacific), Gulf of California and Gulf of Mexico.</p>	<p>-</p>
<p>1. Protect our shared environment 2. Encourage responsive government</p>	<p>Environment: oceans and science. Governing: international policy.</p>	<p>-</p>
<p>Environment: To achieve a low-carbon global economy, the recovery of marine fisheries and habitats, and to stop illegal wildlife trade.</p>	<p>Marine conservation worldwide, Europe, MesoAmerica, and North Pacific/Arctic</p>	<p>-</p>
<p>Good Governance: Humanity United works closely with government and civil society to support good governance initiatives. Thriving Communities: With a belief that human freedom is paramount to an individual's ability to thrive, Humanity United works to abolish practices of modern day slavery across the globe.</p>	<p>Advancing Human Freedom through the Freedom Fund investing in: Hotspot regions - Thailand, Movement building - Knowledge Sharing Platforms and Convening and coalition building, Global initiatives - Transparency in supply chains and Legal tools to fight slavery</p>	<p>-</p>

Organisation	Mission	Principles
Fairbairn	To improve the quality of life for people and communities throughout the UK both now and in the future	Funding the charitable work of organisations with the ideas and ability to achieve positive change
Ellerman	Supporting charities that make a practical difference to people, society and the natural world.	To advance the wellbeing of people, society and the natural world. We like to support smaller organisations whose work has reach and significance across the UK. In order for our funds to have as wide an impact as possible we look for charities that have a national footprint.

Organisation	Mission/vision	Principles/values
Greenpeace	<p>To ensure the ability of the Earth to nurture life in all its diversity. Greenpeace seeks to:</p> <ul style="list-style-type: none"> <li>• protect biodiversity in all its forms</li> <li>• prevent pollution and abuse of the earth's ocean, land, air and fresh water</li> <li>• end all nuclear threats</li> <li>• promote peace, global disarmament and non-violence</li> </ul>	Positive change through action (investigation and exposure, lobbying decision makers, championing solutions and taking nonviolent direct action) according to values of independence, internationalism and personal responsibility.
World Wildlife Fund	To conserve nature and reduce the most pressing threats to the diversity of life on Earth	We work globally, with every sector, at every level
Nature Conservancy	To conserve the lands and waters on which all life depends. Working towards a world where the diversity of life thrives, and people act to conserve nature for its own sake and its ability to fulfill our needs and enrich our lives.	Using a non-confrontational, collaborative approach and staying true to values of: Integrity Beyond Reproach; Respect for People, Communities, and Cultures; Commitment to Diversity; One Conservancy; and Tangible, Lasting Results

Relevant programmes	Relevant priorities	Relevant targets
Environment: Addressing environmental degradation and biodiversity loss, and challenge environmental inequality in people's lives. Food: Finding an alternative system that produces higher quality food in ways that are better for people, the environment and livestock.	Environment: Connecting people with nature, Large-scale conservation of natural environments on land and sea, countering the effects of damaging human activities. Food: Food and wellbeing, working towards a more coherent food sector	
Environment: Contribute to greater harmony between people and the planet.	Environment: Managing habitats, protecting the seas.	

Relevant programmes	Relevant priorities	Relevant targets
Climate (climate solutions that will help us prosper without damaging the planet), forests (protect the world's ancient forests and the plants, animals and peoples that depend on them), healthy oceans (oceans that are protected and full of abundant, healthy marine life; oceans that are carefully managed, and sustainable fishing practices that don't put marine species at risk), peaceful world (Governments and industry around the world must ensure that the Earth's finite resources are shared fairly, so people have what they need to live peacefully).	Healthy oceans: defending oceans by campaigning for marine reserves, and for an end to unsustainable fishing.	
Forests (Conserve the world's most important forests), Oceans (Safeguard healthy oceans and marine livelihoods), Fresh Water (Secure water for people and nature), Wildlife (Protect the world's most important species), Food (Double net food availability; freeze its footprint), Climate (Create a climate-resilient and zero-carbon world, powered by renewable energy).	Oceans: Sustainable fisheries (eliminate illegal fishing, transform seafood markets), Arctic conservation, Restoring resilient ecosystems, Innovating ocean solutions. Food: Increase supply of more sustainably sourced food, Increase demand of more sustainably sourced food, education and action	1. Work across the seafood supply chain to ensure 20% of the world's wild capture fisheries are sustainable (as measured by the marine stewardship council certification or equivalent) 2. illegal fish will be diminished by 50% in international trade through expanded governance, enforcement and market access controls.
Protecting Water, Action on Climate Change, Saving Oceans, Conserving Land, and Transforming Cities	Restoring Coastal Habitats, Helping People and Marine Life Adapt to Climate Change, Developing Better Approaches to Fisheries, Expanding Ocean Protection and Improving Management	-

Organisation	Mission/vision	Principles/values
Marine Stewardship Council	To address the problem of unsustainable fishing and safeguard seafood supplies for the future.	Working with scientists, fisheries, seafood producers and brands to promote sustainable fishing and safeguard seafood supplies for the future.
Sustainable Fisheries Partnership	To engage and catalyze global seafood supply chains in rebuilding depleted fish stocks and reducing the environmental impacts of fishing and fish farming. Working towards healthy marine and aquatic environments, secure seafood supplies, and a thriving seafood economy. The organization is dedicated to working directly with industry and does not engage in any form of advocacy.	Mobilizing the seafood industry as a positive force in promoting sustainable practices.
Environmental Defense Fund	To preserve the natural systems on which all life depends.	EDFs work is guided by science and economics, we find practical and lasting solutions to the most serious environmental problems. On each of these issues, EDF's role involves applying the best science and economics - along with smart policies and politics - to harness the power of the marketplace to protect the environment.
Client Earth	Vision for an Earth where people can achieve their full potential within a diverse, resilient biosphere. Using law as a tool to mend the relationship between human societies and the Earth. Working in Europe and beyond, bringing together law, science and policy to create practical solutions to key environmental challenges	Possibility, strategy, boldness, the power of law, adaptability, transparency, participation and collaboration

Relevant programmes	Relevant priorities	Relevant targets
Set standards, Work with fisheries, Work with seafood brands and retailers, Work with developing countries, Raise awareness with consumers, Educate future generations	Set standards (maintaining credible standards for sustainable wild fishing and seafood traceability), Work with fisheries (offering fisheries a way to gain recognition and reward for good environmental management), Work with seafood brands and retailers (opportunity to place MSC certification at the centre of their sustainable seafood policies), Work with developing countries (to give all fisheries equal opportunities to enter MSC assessment), Raise awareness with consumers (using the blue MSC label as an easy way to choose wild, sustainable seafood that can be trusted), Educate future generations (providing teachers and school caterers with materials to teach the importance of sustainable fishing).	-
Provide the seafood industry with tools to help make fishing sustainable through information, improvement and global programs.	Information: FishSource database of fisheries and a developing aquaculture component. Improvement: over 40 fishery improvement projects around the world and aquaculture improvement projects in China, Vietnam, and Indonesia. Global programs: Seafood and Social Development, Global Ocean Health, and Ocean Disclosure Project.	-
Oceans and ecosystems	Sharing knowledge, tools and experience with policymakers, industry, fishermen and others, Working with governments to grant fishermen long-term, secure rights to fisheries under a clear set of rules, Working to secure new sources of capital and realign existing resources to support this transition. Focus on Chile, European Union (expanding from current efforts in Spain, Sweden, & UK), Mexico, Nauru parties, Peru, United States and thereafter China, Indonesia, Myanmar, Japan, Phillipines, and Vietnam.	Transform policies and practices to sustainable fishing in 12 countries (62% of global catch).
Using law as a tool for social change, the contribution of law, improving access to justice in the following areas: Protecting wildlife, Managing fisheries, Climate & energy, Climate & Forests, Access to justice, Financial institutions, Company law, EU environmental law, Clean air, Toxic chemicals, Public procurement, and Environmental thinking	Managing fisheries for healthy oceans: Advisory Councils (making sure laws are applied and providing advice on how to make this new system work effectively), Advising on fisheries across the EU (helping to ensure the Common Fisheries Policy is implemented correctly and effectively), Sustainable Seafood (coordinating the Sustainable Seafood Coalition, making it easier for consumers to make the right choices when it comes to buying seafood)	-

Organisation	Mission/vision	Principles/values
New Economics Foundation	To transform the economy so that it works for people and the planet	Kick-start the move to a new economy through big ideas and fresh thinking, through high quality, ground-breaking research, demonstrating the power of our ideas by putting them into action, working with other organisations in the UK and across the world, to build a movement for economic change.
Marine Conservation Society	To ensure Seas fit for life - clean seas and coasts that support abundant marine life, healthy fish stocks and enjoyment for all. To achieve measurable improvements in the state of our seas, marine biodiversity and fish stocks through changes in government policy, industry practice and individual behaviour.	The key drivers for change are to inform and involve people, communities and stakeholders in our work and influence decision makers and businesses through public engagement and collaboration, as well as through direct advocacy and campaigns.
Wildlife Trusts	To create Living Landscapes, to secure Living Seas and to inspire people to value and take action for nature.	The Royal Society of Wildlife Trusts operates as an umbrella body for the 47 individual Wildlife Trusts, covering the whole of the UK, the Isle of Man and Alderney. Principles include: presence on the ground in local communities, working with a wide range of different people to achieve change, working in partnership with those with shared objectives, building consensus and finding pragmatic solutions which achieve real outcomes for wildlife.

Relevant programmes	Relevant priorities	Relevant targets
Economy (Tackling the root causes of the financial crisis and ongoing recession), Environment (Delivering economic wellbeing within environmental limits: Energy & Climate Change, Fisheries, Food & Agriculture, International Development, Transport & Infrastructure), Social (Moving towards a fairer, more equal society)	Fisheries (sustainable fisheries), Food & Agriculture (successful food systems)	-
Protecting marine life, Sustainable fisheries, Clean seas and beaches, Working seas, and Engaging our audiences	Protecting marine life (establish an ecologically coherent UK network of well-managed Marine Protected Areas - MPAs), Sustainable fisheries (Recovery of fish stocks and reduced impact of fishing and fish farms on habitats, non-target species and marine ecosystems; and increase availability of sustainability wild caught and responsibly farmed seafood), Clean seas and beaches (reduce litter and bathing water pollution at UK beaches), Working seas (ecologically sustainable planning and management of major marine industries and our wider seas), Engaging our audiences (increase public understanding, appreciation and enjoyment of UK seas and active involvement in marine conservation)	By 2020 - Protecting marine life (30% of representative marine habitats protected from damaging activities by 2020; UK network of MPAs designated by 2018; 250,000 additional Seasearch records by 2020), Sustainable fisheries (significant reduction in bycatch levels for major commercial fisheries; 20% of Scottish farmed salmon certified by Aquaculture Stewardship Council; All EU commercial fish stocks within MSY; no MCS Fish to Avoid sold by all main retailers and suppliers)
Living Landscapes (transforming the environment we live in: restoring, recreating and reconnecting wildlife-rich spaces in rural and urban areas), Living Seas (marine wildlife thrives, from the depths of the ocean to the coastal shallows.)	Living Seas (Marine Protected Areas; Fishing & Seafood; Marine Planning & Sustainable Development)	Campaigning to ensure: 1. MPAs - an ecologically coherent network of MPAs in UK waters - a "Blue Belt" around the UK - is established. 2. Fishing - accidental capture of animals are prevented, damage to seabed habitats from gear is minimised, impacts on the marine food-web are reduced, and ensuring target species are not over-fished 3. Planning - marine planning has the environment at its heart.

## Appendix 5 – NGOs in receipt of funding from selected foundations awarded 2013/14/15

Organisation	No of Awards	Amount
ADM Capital Foundation Inc	1	£151,448
Advanced Conservation Strategies	1	£36,348
Alaska Conservation Foundation	1	£625,527
Alaska Longline Fishermen's Association Programme	1	£218,934
Alaska Marine Conservation Council	2	£651,846
Alaska Wilderness League	2	£27,079
American Bird Conservancy	2	£240,272
Antarctic And Southern Ocean Coalition	1	£12,116
Anti-Slavery International	1	£38,658
Aquaculture Stewardship Council	1	£90,000
ArtCorps Programme	1	£110,557
Asia Group Advisors PTE. LTD.	2	£172,651
Association of Village Council Presidents (AVCP) Programme	1	£75,724
Battelle Memorial Institute	1	£261,702
BC Spaces for Nature Society	1	£104,495
Belize Audubon Society (BAS) Programme	1	£142,361
Belize Federation of Fishers Programme	1	£53,916
Biospherics Pty. Ltd.	1	£136,303
BirdLife International	1	£303,003
Bite-Back Shark and Marine Conservation	1	£60,000
Blue Earth Consultants, LLC	1	£36,348
Blue Marine Foundation (BLUE)	1	£150,000
Blue Ocean Institute, Inc.	1	£90,869
California Environmental Associates	8	£605,490
Canadian Parks and Wilderness Society	1	£212,027
Cape Cod Commercial Fishermen's Alliance	4	£1,024,317
Cardiff University Otter Project	1	£150,000
Centro Mexicano de Derecho Ambiental, A.C.	2	£196,883
Centro Mexicano Para La Defensa Del Medio Ambiente A.C.	1	£18,174
Chefs Collaborative	1	£30,256
ClientEarth	1	£190,825
COAST - Community of Arran Seabed Trust	1	£75,000
Coastal First Nations - Great Bear Initiative	2	£1,690,185

Organisation	No of Awards	Amount
Coastal States Stewardship Foundation	1	£1,290,338
Colorado State University Programme	1	£272,596
Community of Arran Seabed Trust (COAST)	1	£150,000
Compassion in World Farming Trust	1	£120,000
Comunidad y Biodiversidad, A.C.	4	£526,132
Confluence Philanthropy Inc	1	£30,290
Conservation Alliance	1	£30,284
Conservation International	5	£5,783,704
Conservation Law Foundation	2	£504,956
Conservation Society of Pohnpei	1	£72,695
Consultative Group On Biological Diversity	4	£127,086
Context Partners	3	£129,214
Coral Reef Research Foundation Inc.	1	£36,348
Cumbria Wildlife Trust	1	£110,000
Defensa Ambiental del Noroeste	1	£121,159
Digital Timber, Inc	1	£59,459
Duke University	1	£151,448
Earth Economics	1	£242,620
Earthjustice	3	£404,253
Ecology Project International	2	£366,505
Ecotrust Programme	1	£196,883
Edge Research	1	£65,123
Environmental Defense Fund	4	£5,520,665
Environmental Justice Foundation	1	£128,733
Environmental Law Institute	1	£136,303
Ethical Trading Initiative	1	£6,255
Fabian Society	1	£51,948
Fauna & Flora International	1	£256,256
Fiji Locally Managed Marine Area Network	1	£30,290
First Alaskans Institute Programme	1	£60,579
Fishchoice	3	£566,416
Focus on Labour Exploitation	1	£37,532
Fondation Ensemble Programme	1	£605,793
Fondo Mexicano para la Conservacion de la Naturaleza, A.C.	4	£714,899
Fondo para la Accion Ambiental y la Ninez	1	£6,058

Organisation	No of Awards	Amount
Food Climate Research Network	1	£140,000
Forest Ethics	1	£393,765
Forever Costa Rica Association	1	£6,058
Foundation for Education and Development	1	£131,359
Free the Slaves	1	£9,266
Fundacion Biodiversidad Programme	1	£1,211,585
Gillett, Preston and Associates Inc.	2	£55,491
Global Feedback Ltd	1	£29,886
Global Greengrants Fund	1	£48,463
Greenpeace	1	£124,490
Grupo Tortuguero de las Californias A.C.	1	£48,463
Gulf of Maine Research Institute	1	£24,232
Gulf Restoration Network	1	£45,434
H.M. Johnson & Associates	1	£30,290
Heal the Bay	1	£36,348
Human Rights Watch	1	£125,105
Human Trafficking Pro Bono Legal Centre	2	£86,784
ICF - International Community Foundation	1	£61,927
ImpactAssets	4	£1,105,227
Institute For Fisheries Resources	1	£29,595
Institute of Food Technologists	2	£1,283,480
Instituto Internacional de Derecho Y Medio Ambiente (IIDMA) Programme	1	£60,577
Intercultural Center for the Study of Deserts and Oceans	2	£197,602
International Community Foundation	2	£154,174
International Labor Rights Forum	1	£65,524
International Pole & Line Foundation	2	£104,053
International Seafood Sustainability Foundation	3	£2,638,480
Internews Network	2	£172,644
Inuit Circumpolar Council	2	£401,115
ISEAL Alliance	3	£268,779
Issara Institute	1	£46,934
Julian Cho Society (JCS) Programme	1	£76,164
Kawerak, Inc. Programme	2	£351,539
Khadem Foundation, Inc.	1	£30,290
Kitasoo-Xaixais Band Council	1	£187,823

Organisation	No of Awards	Amount
Labour Rights Promotion Network Foundatio	1	£12,511
Liberty Asia	1	£31,276
Local Bounty	1	£90,869
Maine Coast Fishermen's Association	1	£48,936
Manta Consulting (Fish 2.0)	5	£595,893
MAP Foundation	1	£73,832
Marine Affairs Research and Education	1	£99,956
Marine Exchange Of Alaska	1	£6,058
Marine Fish Conservation Network Programme	1	£218,934
Marine Life	1	£90,000
Marine Stewardship Council	3	£2,307,932
McGill University Programme	1	£48,445
Media Trust	1	£75,000
Mesoamerican Reef Fund Programme	2	£6,437,008
Minnesota Zoo Foundation	1	£62,691
Mobile Baykeeper Inc.	1	£66,637
Mongabay Org Corporation	1	£90,869
Monmouth University, Urban Coast Institute	1	£972,903
Monterey Bay Aquarium	4	£28,760,943
National Aquarium in Baltimore	1	£24,232
National Audubon Society	2	£272,607
National Fish and Wildlife Foundation	2	£605,773
National Oceanic and Atmospheric Administration	1	£375,591
National Parks Conservation Association	1	£60,579
National Wildlife Federation	1	£242,317
Native American Rights Fund Programme	1	£187,658
Natural Resources Defense Council	5	£1,602,129
New Economics Foundation	2	£308,482
New Venture Fund	11	£3,260,621
Noroeste Sustentable	2	£469,464
Northwest Institute for Bioregional Research Society	1	£173,003
Not specified	45	£10,640,762
Nourish Scotland	1	£191,305
Nunamta Aulukestai Programme	1	£36,348
Ocean Conservancy	6	£3,261,732

Organisation	No of Awards	Amount
Ocean Foundation	6	£407,173
Oceana	2	£577,132
Oregon State University	2	£1,514,481
Oxfam America Inc.	1	£272,607
Pacific Environment	2	£702,101
Palau Conservation Society	1	£90,869
Palau International Coral Reef Center	1	£60,579
Peace Development Fund Programme	1	£250,211
Pew Charitable Trusts	6	£1,778,585
Pig Shed Trust Programme	1	£2,241,433
Plan Zheroes - The Zero Food Waste Heroes	1	£95,000
Polaris	2	£74,077
Port Orford Ocean Resource Team	1	£18,174
Portland Audubon Society	1	£9,087
Prescott College	1	£60,579
President and Fellows of Harvard College	1	£30,290
Pronatura Noroeste AC	1	£72,695
Protected Areas Conservation Trust (PACT) Programme	1	£78,753
PT Pet Norton Consulting International	1	£66,637
RARE	1	£181,738
Redstone Strategy Group, LLC Programme	1	£60,579
Regents of the University of California	4	£337,630
Resources Legacy Fund	3	£1,085,660
Sailors for the Sea Inc	2	£237,577
San Diego Natural History Museum	1	£45,434
Sarstoon Temash Institute for Indigenous Management Programme	1	£431,418
Scaling Blue, LLC	1	£46,161
School Food Matters	1	£45,000
Scottish Creel Fishermen's Federation	1	£86,000
Scottish Environment LINK	1	£35,800
Scottish Wildlife Trust	1	£322,525
Sea Sanctuaries Trust	1	£32,046
Seafood Harvesters of America Education Fund	1	£30,290
Seafood Industry Research Fund	1	£42,405
SeaWeb	2	£121,159

Organisation	No of Awards	Amount
Shark Trust	1	£49,000
Shedd Aquarium Society	1	£69,560
Shellcatch	1	£107,811
Simon Fraser University	1	£150,570
Siwatibau and Sloan	1	£90,869
Skeena Watershed Conservation Coalition	1	£273,385
Skeena Wild Conservation Trust	1	£245,531
SmartFish AC	1	£139,326
Social and Environmental Entrepreneurs SEE	5	£308,046
Sociedad de Historia Natural Niparaja A.C.	1	£135,698
South Georgia Heritage Trust	1	£73,600
Springboard Partners LLC	1	£151,448
Stanford University, Center for Ocean Solutions	1	£328,298
Stichting Aquaculture Stewardship Council Foundation	2	£451,315
SuMar, Voces por la Naturaleza, A.C.	1	£44,041
Surfrider Foundation	1	£410,231
Sustain	1	£60,000
Sustainable Fisheries Partnership	4	£2,522,445
Sustainable Fishery Advocates (FishWise)	4	£1,075,769
Taxpayers for Common Sense	1	£18,174
The Board of Trustees of the Leland Stanford, Jr. University	1	£51,492
The Climate Coalition	1	£200,000
The Deep	1	£24,600
The Fairtrade Foundation Ltd	1	£199,500
The Food Foundation	1	£143,522
The Nature Conservancy	17	£5,296,957
The Open Seas Trust	1	£133,500
The Sustainability Incubator	1	£53,795
Theodore Roosevelt Conservation Partnership, Inc.	1	£121,159
Third Sector New England	1	£502,194
This is Rubbish	1	£65,500
Thomson Reuters Foundation	1	£52,171
Tides Canada Foundation	6	£12,792,166
Tides Center	1	£605,793
Transfair USA	1	£156,045

Organisation	No of Awards	Amount
Transparentem	1	£68,808
TruFund Financial Services, Inc.	1	£302,896
Trust for Conservation Innovation	6	£2,273,088
Ulster Wildlife Trust	1	£158,330
United Nations Development Program- COMPACT Programme	1	£312,764
University of Alaska-Anchorage Programme	1	£344,040
University of California, Santa Barbara National Center for Ecological Analysis and Synthesis	1	£929,725
University of South Florida Foundation, Inc.	1	£55,733
University of Technology, Sydney	1	£69,407
University of Washington	6	£482,178
University of Wollongong	1	£30,290
Verité	1	£28,149
Virtual Food Academy (via Joseph Rowntree Charitable Trust)	1	£20,214
Voces por la Naturaleza, A.C.	1	£121,159
Wageningen University	1	£48,948
Watershed Watch	1	£222,156
West Coast Environmental Law	2	£770,777
Wild Salmon Center	9	£6,717,343
Wild Trout Trust	1	£70,000
WildAid Inc.	2	£85,524
Wildcoast	1	£121,159
Wildlife and Countryside Link	2	£350,000
Wildlife Conservation Network (WCN) Programme	1	£227,172
Wildlife Conservation Society	7	£1,011,565
Wildlife Trusts	1	£154,951
World Wildlife Fund	15	£3,539,371
Xanadu Hospitality Management	2	£166,229
Yayasan Masyarakat Dan Perikanan Indonesia	1	£90,869
Yayasan Transformasi Kebijakan Publik Indonesia	1	£151,448
Yorkshire Wildlife Trust	1	£113,566
Zago, LLC	1	£79,965
Zoological Society of London, The Programme	1	£160,003
<b>Grand Total</b>	<b>468</b>	<b>£156,405,598</b>





# SEAFISH

the authority on seafood

**Seafish**  
18 Logie Mill, Logie Green Road,  
Edinburgh, UK. EH7 4HS

t: +44 (0) 131 524 8697  
f: +44 (0) 131 558 1442  
e: [seafish@seafish.co.uk](mailto:seafish@seafish.co.uk)  
w: [www.seafish.org](http://www.seafish.org)

*Supporting a profitable, sustainable  
and socially responsible future for  
the seafood industry.*