



Teeming with life

A summary of the Marine Stewardship Council's Strategic Plan, 2017-2020

Our vision is for the world's oceans teeming with life, and seafood supplies safeguarded for this and future generations.

Our mission is to use our ecolabel and fishery certification program to contribute to the health of the world's oceans by recognising and rewarding sustainable fishing practices, influencing the choices people make when buying seafood and working with our partners to transform the seafood market to a sustainable basis.



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Why we're here

Oceans matter. The largest ecosystems on earth, they are home to an extraordinary diversity of life. They provide the oxygen for every other breath we take, absorb a third of our carbon emissions, and give us a renewable source of healthy, delicious food. Around the world, a billion people depend on seafood as their main source of animal protein. The fishing industry contributes US\$500 billion per year to the global economy, while around one in 10 people depends on fishing for their livelihood.

But the oceans are not inexhaustible or indestructible. More than a quarter of fisheries globally are overexploited, and many others aren't managed as well as they could be. Coupled with climate change, pollution and other manmade impacts, this is putting ocean ecosystems under tremendous pressure.

At the same time, there is growing global recognition of the importance of ocean conservation, most prominently encapsulated in the UN Sustainable Development Goals (SDGs). The SDGs include a standalone goal (SDG14) to conserve and sustainably use the oceans, seas and marine resources for sustainable

development, including an ambitious target to end overfishing, transform fisheries management and rebuild stocks by 2020. Other goals and targets are also highly relevant to MSC's work, including SDG12, which aims to ensure sustainable consumption and production patterns. Signed by 193 countries, the SDGs set the agenda for governments, business and development agencies between now and 2030.

MSC and our partners have an important contribution to make to this shared vision. Over the last 20 years, we've helped to catalyse better fisheries management, forge partnerships and deliver real change from the Arctic to the Indian Ocean.

But we can do more. We need to inspire improvements in more fisheries and ocean ecosystems. We need to enable more fishers, particularly those in the global south, to benefit from certification and better management. We need to build new markets for sustainable seafood to reward and encourage further sustainable practices. And we need to ensure our standards remain robust, credible and effective.

Our Integrated Strategic Plan (ISP) outlines how we're going to make this happen over the next three years, and beyond.



The MSC at 20

In 1997, overfishing was threatening our oceans, with many important stocks overexploited to the point of collapse. The MSC was set up in response, as a way of recognising and rewarding sustainable fisheries, and providing incentives for others to improve. Consumers who want sustainable seafood know that, when they see the blue MSC ecolabel, the product can be traced back to a fishery that's been independently certified as sustainable. And as market demand grows, it helps incentivise less well-managed fisheries to improve their performance.

Over the last 20 years, we've proved that this concept works: that credible certification of sustainable fisheries can drive real and lasting change. There is compelling evidence of tangible environmental impact on the water, from recovering fish stocks to reduced bycatch. This in turn improves food security, livelihood resilience and the long-term profitability of businesses along the seafood value chain.



As of January 2017:

12%

of global marine catch is MSC certified, with a further 2% in assessment

More than 300

fisheries have been certified in 36 countries

More than 1200

improvements made by certified fisheries to become or remain certified, with many more being developed

More than US\$5.2 BILLION

spent by consumers on MSC certified seafood in 2016

More than 100

companies have commitments to source MSC certified seafood

More than 25,000

MSC labelled products are available in over 100 countries

More than 3,700

MSC Chain of Custody certificate holders covering 40,000 sites in 90 countries.

We're proud of these achievements, but they are not the MSC's achievements: they are those of our partners. While we are a catalyst for change and a showcase for best practice and innovation, the actual transformation happens through the leadership and actions of our many partners: fisheries large and small improving practices on the water, traders and processors building sustainable supply chains, retailers and brands pioneering market commitments, marine scientists and NGOs providing expertise and insights, and consumers choosing sustainable seafood.

Our strategy

Our vision is for the world's oceans to be teeming with life, and seafood supplies safeguarded for this and future generations.

Over the next three years, we will accelerate our work with fisheries to support them to achieve and maintain certification, with the objective of increasing the proportion of the global marine catch that is certified or engaged in the programme to 20%. Looking further ahead, our aim is for the MSC to remain a leading catalyst for improved fisheries management and market transformation, contributing to the sustainable use of our oceans, supporting resilience, food security and livelihoods well into the future. Our aspiration is that by 2030, more than one-third of the global marine catch will be certified or engaged with the MSC programme.

We will focus our outreach on the most important biodiversity hotspots, species and marine regions. We will also strengthen our voice, engagement and accessibility in the global south – places where the world's most important biodiversity and fisheries are concentrated, and where the challenges for meeting the sustainability bar set by the MSC are the greatest.

At the same time, we will be putting in place the organisational structures that will enable us to grow in scale and reach over the next three years and beyond – including embracing digital technology and platforms in our data management, internal communications and public engagement.

Transformation on this scale will mean expanding into new areas.

Vision

For the world's oceans to be teeming with life, and seafood supplies safeguarded for this and future generations

2030 aspiration

More than a third of global marine catch certified or engaged by 2030. MSC is a leading catalyst for improved fisheries management and market transformation, contributing to the sustainable use of our oceans, supporting resilience, food security and livelihoods

2020 goal

20 per cent of global marine catch comes from MSC certified or engaged fisheries, supporting productivity and resilience in globally important marine ecosystems



Enabling and resourcing a high performing global organisation

In focus: impacts at scale

Engaging 14% of global marine catch in the MSC programme has taken 20 years. Reaching 20% in just three years is a big ask – but urgent and ambitious action is what's needed if we're to help meet global ocean goals.

Some species and regions are better represented in the MSC programme than others. Introducing MSC to a new species group, market or ocean region requires engagement, education and time – but once a critical mass of certified products becomes available, our model starts to create its own momentum. We've seen this happen for key species such as pollock, cod, salmon, clawed lobster and cold-water prawn, and regions like North America.

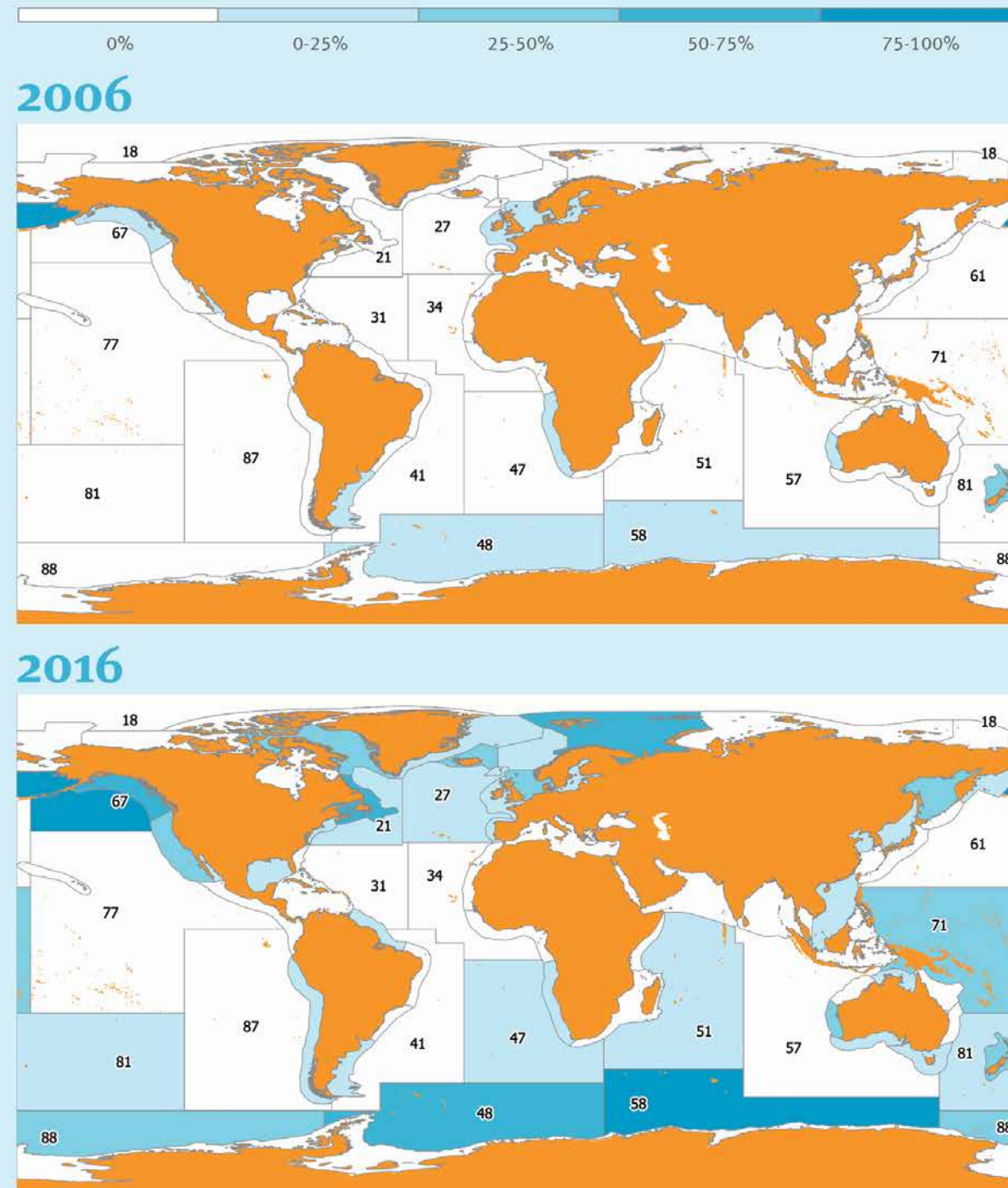
To increase the number of fisheries working towards the MSC Standard, we'll work with fisheries in ecosystems that are under-represented in the MSC programme to date, but where catch levels and threats to biodiversity are high. We'll also focus on fisheries and markets for species currently under-represented in the MSC programme that are important components of

global ecosystems as well as important for local economies and livelihoods, including squid, octopus, crab, tuna, small pelagic species and seaweed. Building and maintaining partnerships with collaborators, including those working with fisheries making improvements towards achieving MSC certification, is central to this work.

Of course, we'll continue to be open to all regions and all species, and will continue to work with, add value to and celebrate fisheries that are already MSC certified. A commitment to sustainable fishing is a continuous journey. We'll give particular support to those preparing for recertification against the new version of the MSC Standard (V2.0), so that they can demonstrate long-term progress and continue to enjoy the environmental and socio-economic benefits that flow from fishing sustainably.

Mapping sustainable fisheries

Percentage of certified catch per LME (Large Marine Ecosystem) and FAO Major Marine Fishing Area



In focus: the global south

Fisheries in the global south are vital to food security, livelihoods and economic development – so it's critical that they are managed sustainably. Yet many developing countries lack the resources, data and governance systems they need to meet the MSC Standard and benefit from the growing market for sustainable seafood. As of April 2017, 28 MSC certified fisheries came from the global south, representing around a tenth of the total MSC certified catch volume.

Over the next three years, we will work with governments, partners, fisheries and markets to seek to double the number of fisheries from the global south involved in the MSC programme. Many of our priority marine ecosystems and species are in the global south. Often, these fisheries need to make significant improvement to meet the MSC Standard. While that's a considerable challenge, it means the potential environmental, social and economic benefits are great.

To enable this, we'll be investing in:

- **Outreach programmes** to raise awareness of the MSC and build capacity in key regions, including in North and West Africa, Latin America, India and Indonesia. We'll establish strategic global and regional partnerships with governments, private sector and NGOs to encourage fisheries to put in place the improvements that they will need to achieve MSC certification, and develop more projects that work with fisheries on a regional scale
- **Incentives and tools** that will help small-scale fisheries meet the MSC standard, including tools to enhance market and non-market gains to incentivise improvement and certification
- **Capacity building** to increase the technical ability of scientists, fishers and government personnel to engage with fisheries making improvements towards MSC certification, and to increase the number of MSC auditors.

The MSC will also explore connections with the financial sector, for instance through private investment, 'blue bond' mechanisms and public-private partnerships. We will promote financing mechanisms that increase incentives and support for fisheries and supply chain businesses in the global south to become certified, or to source and trade in MSC certified seafood products.



Our priorities

Five mutually reinforcing priorities are at the heart of our strategy:

Fisheries

The scale of our engagement with fisheries will need to significantly increase, and we'll do this in several ways:

- Working with existing certified fisheries to help them and the ecosystems in which they operate continue to benefit from sustainable management
- Engaging with fisheries in ecosystems that are under-represented in the MSC programme to date but which are suffering high biodiversity threats, particularly those at lower latitudes
- Engaging with fisheries targeting species currently under-represented in the MSC programme and for which there is significant international or local market demand
- Increasing our engagement with fisheries in the global south.

Certification

The MSC represents global best practice in sustainable fisheries and supply chain traceability, while being efficient, credible, relevant and user-friendly. We'll maintain our position as the global leader, consistent with international benchmarking requirements such as ISEAL and the Global Sustainable Seafood Initiative (GSSI), by:

- Regularly reviewing, and revising as necessary, the Fisheries Standard and the Chain of Custody Standard to ensure they keep up with global best practice and new science and management developments, and are clearly presented and auditable
- Introducing risk-based requirements to provide greater assurance that MSC certified fisheries and supply chain companies are free of egregious labour practices
- Developing a programme to support fisheries on the path to sustainability, and new approaches for assessing mixed-species fisheries and those where data is limited
- Improving the efficiency and robustness of audits against both standards, through reviewing our audit and assessment processes, and developing new digital auditing tools and enhanced quality control systems such as the peer review college. All fishery assessment reports are peer-reviewed by independent scientists, and the college manages the process and the peer reviewers.

Markets

Market demand creates an incentive for fisheries to seek certification and improve their practices. To expand sustainable seafood markets and demand for the MSC ecolabel, we'll focus on:

- Building demand in markets that offer the biggest incentives to reward existing good practice and drive changes on the water – those which are both strategically important and receptive to our vision. These include European markets, notably Germany, the UK, France, Spain and Italy, as well as the USA, China and Japan
- Increasing our outreach in distribution channels which have seen a lower uptake of certified and labelled products, such as foodservice and wet fish counters
- Deepening and strengthening our engagement with key commercial partners
- Creating market demand to support our species strategies, by engaging with the US food supplement sector (for small pelagic fisheries) and the seaweed sector in China, Japan and South Korea.

Public awareness

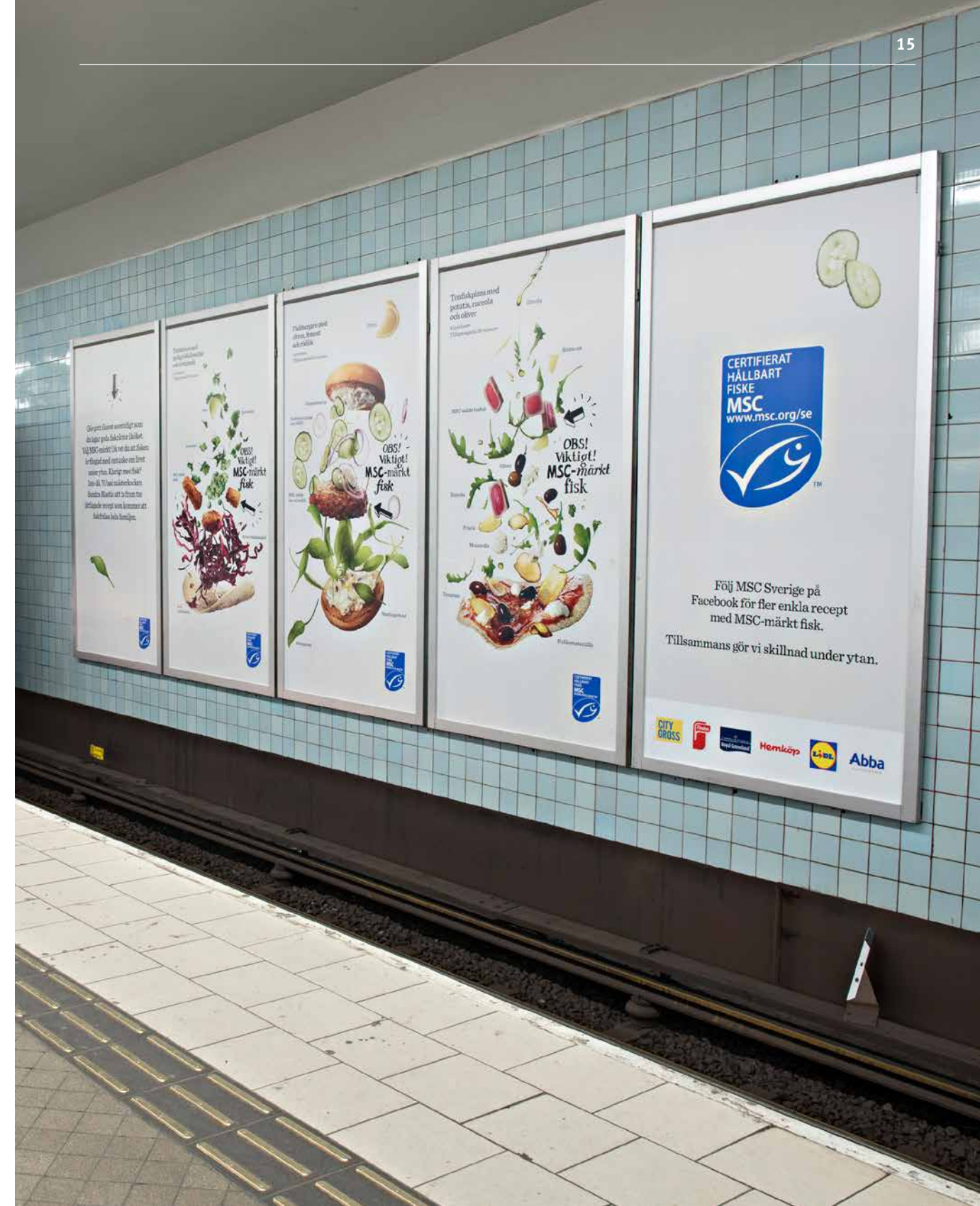
Our ecolabel depends on a high degree of awareness and trust from the industry and the buying public. To maintain this support, we'll focus on:

- Building public awareness and understanding of sustainable seafood and the MSC's contribution through marketing campaigns, media outreach, education, storytelling and engagement with MSC 'ambassadors'
- Showcasing certified fisheries and sustainable seafood champions
- Upgrading our web and social media capabilities to ensure continued relevance, and deeper relationships, with our audiences in a digital world
- Demonstrating our environmental, social and economic impact by increasing our research, upgrading our monitoring and evaluation systems, stimulating high quality peer-reviewed publication on the global impact of the programme and the science behind our work, and sharing our data and results widely, particularly with the ocean science and policy community and media.

Organisation

As we continue to grow and evolve as an increasingly global organisation, we need to remain nimble, efficient and effective. This includes:

- Maintaining a structure consistent with best practice governance standards
- Strengthening the involvement of our stakeholders in our organisation and processes to ensure that MSC remains an open, transparent organisation keen to listen to a diverse range of views
- Stewarding and safeguarding income streams to maintain our financial resilience
- Attracting, developing and retaining exceptional people, and nurturing our unique culture
- Putting in place systems, tools and data to support our governance, compliance and programme delivery.



Power of partnership

Our partners are making a significant difference to the health of the world's fish stocks and marine ecosystems. From improving harvesting strategies and monitoring systems, to taking action to reduce bycatch and the impact on other species, MSC certified fisheries have collectively made hundreds of improvements to their operations. These changes on the water are reinforced by a fast-growing number of certified businesses in the seafood supply chain, which are bringing more sustainable seafood products to more consumers in more countries. They also rely on the involvement of numerous other institutions and stakeholders including scientific bodies, NGOs, retailers, brands, funders and governments.

While we have much to celebrate, we still have much to do. Over the last 40 years the number of overexploited stocks assessed by the FAO has trebled. It's also likely that the large majority of unassessed fisheries around the world are in critical need of improvement or recovery – particularly in the global south, where fishing is so crucial to food security and livelihoods. If we are to respond to the global ocean sustainability challenge, urgent action at scale is needed.

The challenge is huge – but so is the potential for transformation. The MSC is committed to working with our partners and supporters to scale-up our collective contribution to conserving our living oceans and supporting the people who depend upon them – over the next three years, and for years to come.



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