



FUTURE *of* FISH

2021 Impact Report

Director's letter



Dear friends,

In a variety of ways, 2020 and 2021 largely resembled one another. Across the world, cases of Covid-19 persisted and lockdowns remained in effect. Work from home and remote learning continued as the dominant paradigm in numerous places. With unpredictable cycles of openings and abrupt closures occurring throughout public life, it felt like every two steps forward came with one step backward, making it hard to find a rhythm and work-life balance for many of us.

And yet, 2021 stands apart from the preceding year in that both individually and collectively, we saw our ability to adapt continue to evolve amid uncertainties and rally behind the recognition that we are in this for the long haul. Though we have been able to adapt and manage these transitions in the US fairly well, we find our colleagues in Latin America and throughout the world still struggling as the pandemic continues. Which raises the important question: How can we, as global citizens, ensure a more just, resilient, and equitable world for all?

At Future of Fish, we turned our attention from reactive responses, like last year's successful PPE distribution campaign in Peru, to thinking more about preventative measures to carry forward into the future. For example, how do we support fishers and their communities to increase resilience to sudden shocks and long-term risks such as climate change? And, to do so, what resources and capacity must be available to increase the adaptability for those whose livelihoods depend on the ocean?

As an organization, Future of Fish not only applied these lessons for the benefit of our constituents but also to reflect on our business performance as well. For example, we continued to diversify our work with Future of Fish seeking out and offering more consultancy services. This included consulting on global and regional seafood topics for philanthropic and multilateral funders as well as developing new and deeper partnerships to advance efforts to develop collaborative models to reduce overfishing and explore solutions to unlock finance for fishers and coastal communities.

It was also a milestone year in finalizing the legal operations and leadership of our two non-profit affiliate organizations, Future of Fish Chile and Future of Fish Peru. This included the growth of the teams to service their programs more efficiently adding two and six new staff respectively.

The new structure with our affiliate programs has enabled the international Future of Fish office to concentrate on our role as intermediaries, focusing deeply on our partnerships with other organizations in order to understand the needs of communities to provide the connection and establish relationships with resource providers to support development initiatives. A focus on supporting these collaborations with our systems' mapping and understanding combined with expertise in finance and data systems enhances our value proposition for funders and partners alike.

It is critical not to lose sight of the perspective gained through the pandemic, especially when it comes to planning for future shocks. The pandemic's pervasive reach on the many facets of people's lives, livelihoods, and wellbeing is akin to what we are experiencing and will continue to experience more keenly when considering the impacts of climate change. The more that we can learn from this acute shock as a model to prepare for what's to come, the better.

As we set forth into 2022, the defining emotion we plan to carry forward is that of hope. We are excited about the many new opportunities on the horizon and the potential for scaled impact. If you are interested in partnering with us on this mission of building a just and sustainable Blue Economy, please don't hesitate to get in touch.



A stylized, handwritten signature in dark ink.

Peter Battisti, Executive Director



Future of Fish- story & evolution

Future of Fish was born from a question:
How might we end the global overfishing crisis?



To answer it, a multidisciplinary team of designers, journalists, anthropologists, and environmental scientists embarked on a year-long journey to interview experts and observe first-hand the journey of seafood from water to plate. Our mission was to understand what was working well and what wasn't, and importantly...what were we missing that needed to be invented?

This was back in 2009 when the idea of "systems change" and design thinking had not yet reached the sustainable oceans space. But the results of this approach proved powerful. Many of the insights discovered in this initial research still hold true today, including two that serve as the backbone of our work at Future of Fish thirteen years on:

- Better data is a critical yet missing piece that limits not just fishery management, but also business opportunities that could be powerful engines of change.
- Solutions—especially those driven by entrepreneurs— exist, but are siloed and therefore, not reaching scale.

At that time, there was no organization focused on supporting and building entrepreneurial collaborations across existing solutions with an aim to advance sustainable seafood. So, our founder, Cheryl Dahle, launched Future of Fish in 2011 to build the connective tissue among innovators in the sustainable seafood space and identify pathways to scale impact across different core challenges—including how to accelerate full-chain traceability.



Using our Discovery and Co-Design approaches, we mapped the landscape, identified the root cause barriers as well as proven strategies for success, and then worked with the existing entrepreneurs and experts to co-design solutions that could achieve scale. If this sounds familiar, it is because we still use this human design-driven approach to understanding complexity and identifying opportunity today—within fisheries, coastal communities, and to understand global challenges, such as identifying areas of opportunities for advancing a just and sustainable blue economy in the Caribbean.

In the original "Pod" model of Future of Fish, innovators would self-select to be part of a "Pod", where FoF could facilitate collaboration and unlock support for the solutions hatched during Co-Design. From this model, we

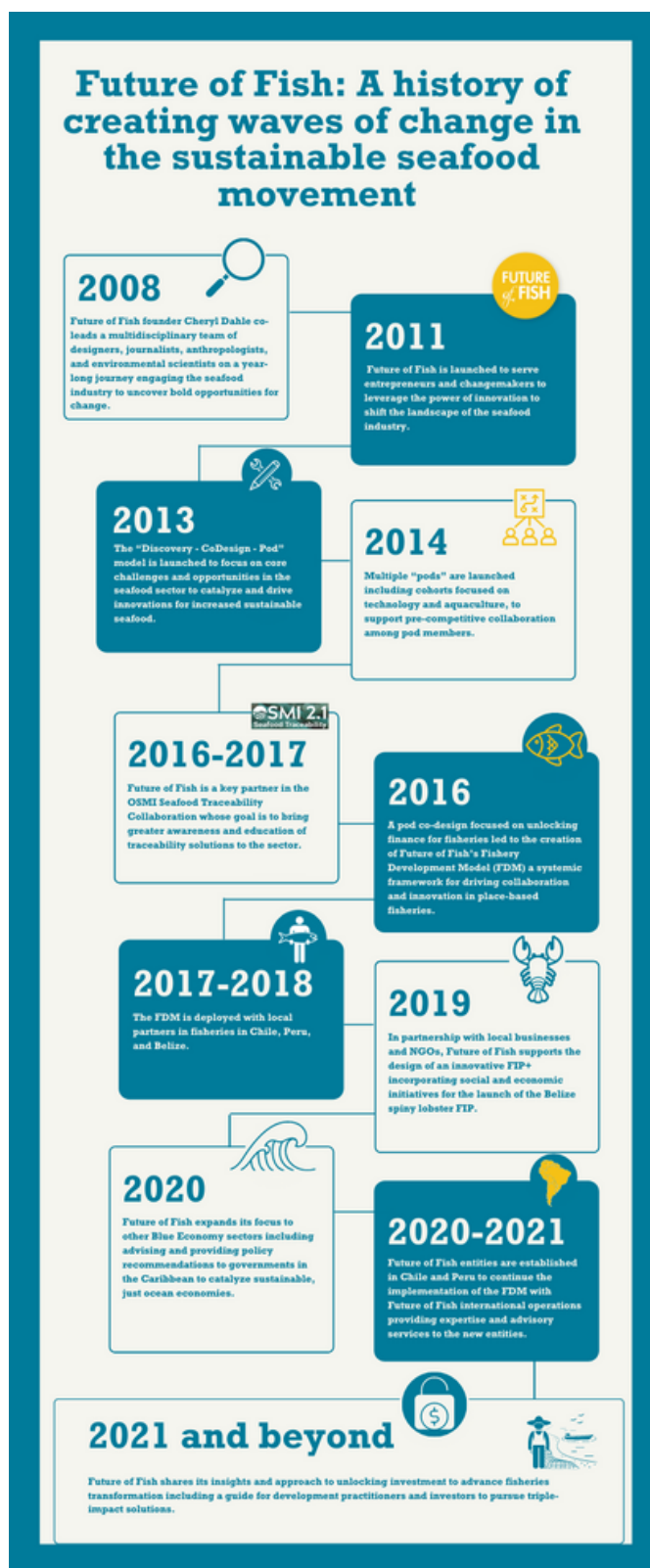
quickly learned that the emergent strategies required field-testing—to move from theory to practice. We also recognized that in many places where these solutions were most needed, key enabling conditions were missing (e.g. economic and social safety nets), that needed to be addressed in addition to supply chain improvements.

This led to the birth of the Fishery Development Model (FDM), which provides both a framework for mapping a fishery system in all its complexity, and a process, to move from research (often Discovery-based) through Co-design with stakeholders, and into development.

Starting in 2017, we began to implement the FDM in Chile, Peru, and Belize in collaboration with partners. This deep dive into specific fisheries continued to shape our Theory of Change. At the same time, we continued to look at global-level issues, with our Global Innovations team working to identify patterns in both challenges and solutions that we and others were encountering. These two sides of FoF, country programs and global innovations, created a positive feedback loop that helped us continue to refine strategies and identify new solutions to pressing challenges.

Today, our Chile and Peru programs now have their own offices and teams that are continuing the development phase of the FDM—testing, iterating, and refining strategies. In Belize, the triple impact FIP we partnered in includes a work plan based on this same FDM assessment, modified to fit the FIP process and protocols. With these programs now established, we are turning attention once again to global system challenges.

Our US team is collaborating with partners to develop and pilot innovations that support thriving, resilient coastal communities around the world.



These solutions focus on better data and financial access—the same key levers we have been working on for over a decade – and the role of fishers in the development of a just, sustainable blue economy.

Since our beginning, FoF has continued to iterate on our approach to driving systemic change in the global seafood industry. Each step in our evolution reflects learnings, and importantly, adaptation to how the system itself is responding. Today, our work looks a little different than it did 13 years ago, but we continue to apply our Discovery and Co-Design approaches to drive systemic change, guided by those original insights around better data, access to finance, and collaboration. Specifically, we partner to develop solutions that drive better data for seafood businesses and fisheries management, and serve as a bridge to connect the communities on the ground with the resources (i.e. experts, funding, technology, etc...) required to overcome pressing challenges at scale. This is how we continue to support thriving communities and oceans. This is how we create a future full of fish.



Mission



Vision

To build human-centered solutions that transform coastal economies for the sustainable use of ocean resources.

A world where coastal communities and the ecosystems that support them are healthy, where local blue economies are diverse and just, and where culture and traditions continue to be at the core of vibrant communities.

Why blue economy?

A just and blue economy recognizes that the future of fish isn't about oceans or fish, it's about people.

- It's about feeding families.
- It's about sustainable jobs and economic development.
- It's about preserving culture and traditions.
- It's about ensuring access to social and economic capital and other resources that drive sustainable ocean stewardship.



**Primary
Focus:**



**Secondary
Focus:**

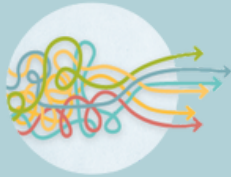


Advancing the **Blue** Economy advances the SDGs.

What we do

Custom consulting

We offer custom research and co-design services, utilizing our Discovery process to dig deep and make sense of complex issues, developing solutions for our clients.



Global innovations

Creating structures that intertwine funders, coastal communities, supply chains and other stakeholders, Future of Fish binds collaborations and facilitates connections to unlock resources for impact.

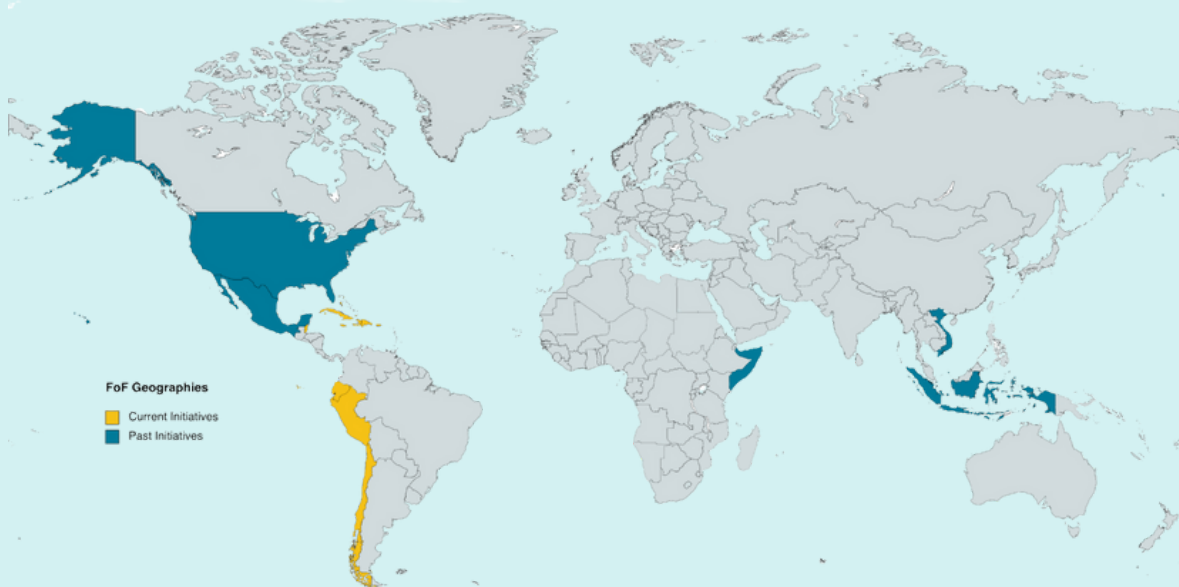


Collaborations

We tackle challenges in blue economy development, co-leading collaborations to focus on an issue or innovation that can generate impact in coastal communities globally.



Partnerships and where we work



Case study- Chile

Strengthening fishers' associations

8 DECENT WORK AND
ECONOMIC GROWTH



12 RESPONSIBLE
CONSUMPTION
AND PRODUCTION



14 LIFE BELOW
WATER



Throughout 2021, Future of Fish Chile was full steam ahead on strengthening the diverse administrative and business capacities of the two fishers' associations with which the organization collaborates. With both Agrupación Social de Jaiberos de San Antonio in the Valparaíso region and COOPDUAO in the Maule region, improvements were predominantly focused on building fishers' processing and marketing proficiency.

Traditionally, fishing communities like San Antonio and Duao have little to no experience engaging as actors in the seafood supply chain beyond selling their catch as whole, fresh fish. This restricts their sales of hake –their main fishery– largely to the same few intermediaries at the beach, which comes with limited agency for the fishers to set their own prices or to be selective regarding which markets and buyers to do business with. Increasing a cooperative's suite of skills to include exploring additional markets and sometimes post-harvest processing enables them to be more active in dictating just prices while negating their reliance on the traditional –and often predatory– beach buyers. This shift in practices ensures that a larger portion of a harvest's overall value remains within its community of origin, a core value of Future of Fish's fishery development approach.

In San Antonio, the expansion of their facilities brought the capability to process, vacuum seal, and freeze value-added products, like common hake fillets, crab claws, and meat. Crab claws tested particularly well during previous commercialization pilots conducted by some members of the "agrupación", especially given their steadily rising prices throughout the pandemic. With such promising potential for growth and the newly installed processing capacity, the fishers' association is focusing on this new product offering. At the same time,

strengthening species diversification removes some pressure off the overexploited hake stocks. The ability to offer value-added products such as these will propel the cooperative forward as they continue to scale and explore access to new markets.

COOPDUAO also celebrated a milestone in 2021 as it was the first time in the cooperative's history that members sold processed fish. Moving into the third stage of the ongoing CORFO social innovation grant, COOPDUAO has now sold directly to different open-air vendors and is able to sell processed hake fillets to Mi Caleta as well as other local responsible seafood vendors, delivering the products in their own refrigerated truck. The cooperative is excited to have reached this stage of the commercialization project and looks forward to advancing additional product trials in the coming year.

Lastly, this past year saw the launch of Fundación Mi Caleta's first physical store in Viña del Mar! Together with our co-founder partners from Centro Pesca Sustentable, Mi Caleta provides traditional fishing communities both an online and a physical platform to sell their processed products. The initiative's success reaffirms that there is a lot of interest among Chilean consumers to connect with fishers directly and to buy "fish with a story" caught using responsible practices. At the same time, minimizing intermediaries maximizes the earnings seen by the participating fishers, while being able to maintain an affordable and very competitive price for final consumers. Mi Caleta is focused on increasing online sales, delivering weekly or bi-weekly to consumers in Santiago and with regularity in the Valparaíso region. Mi Caleta will continue bringing its quality products and its message of environmental sustainability and social responsibility to consumers in 2022.

Case study-Peru

Building strategic partnerships

3 GOOD HEALTH
AND WELL-BEING



5 GENDER
EQUALITY



14 LIFE BELOW
WATER



17 PARTNERSHIPS
FOR THE GOALS



Working to create systems change –whether in a country, in a fishery, or in a community – exacts a customized recipe for success. As bridge builders, Future of Fish connects the dots in how to best serve our customers and the communities they impact/influence. Harnessing the power of collaboration, we view relationships as more than a business transaction but as a partnership for sustainable change.

With this in mind, the name of the game this year in Future of Fish Peru was the formation of several new strategic partnerships. In 2021, our in-country team laid the groundwork for several new and distinct alliances, with international foundations, the Peruvian regional government, and fellow NGOs. These partnerships will allow us to expand our ongoing work in Peru in many exciting ways!

One such partnership is with the Old Dart Foundation (ODF), a UK-based foundation whose mission is to tackle poverty for women, children, and young people by improving outcomes in health, education, and employment. FoF's collaborative, co-design approach to effect systemic change within fishing communities spoke to ODF's interest in teaming up with partners who are working to challenge the status quo. The collaboration aims to develop a "community hub" for La Islilla, a fishing community with which FoF Peru works in the Piura region of the country. This multi-year initiative will begin with a 'discovery analysis,' which will take a deep dive into the communities, mapping power, resources, and exploring the socioeconomic realities of community members. At the same time, the analysis will look at gender equity, family violence, and climate change impacts and adaptation measures. This holistic analysis will inform the establishment of a leadership program, supporting both men and women alike (50%-50% enrollment is the goal) in advocating for their community's needs while strengthening their collective socio-economic resilience.

This year also saw the deepening of collaboration with WWF's Peru personnel working in the mahi mahi and squid fisheries in Piura. Our teams have been integrating our strategies and initiatives to address issues in local communities related to traceability adoption, commercialization, and access to finance for fishers and small businesses. We are excited to see this relationship blossom and grow in the years to come.

Complementary to these initiatives, FoF Peru is working with a number of high-caliber NGOs who bring a range of expertise to the promotion of both sustainable fisheries and resiliency in coastal communities including with COBI, Blue Ventures, and CARE.

With such diverse entities reinforcing the suite of tools and specialized knowledge that FoF Peru employs in their collaborative efforts in Piura, the long-term goal for 2022 and beyond is to scale our development endeavors to other communities and regions of Peru where small-scale fishing is the predominant way of life. We can't wait to see how our work will grow in yet another year's time!



Case study-USA: Covid-19 & D2C consultancy

Finding patterns in a shifting seafood landscape

8 DECENT WORK AND
ECONOMIC GROWTH



9 INDUSTRY, INNOVATION
AND INFRASTRUCTURE



10 REDUCED
INEQUALITIES



12 RESPONSIBLE
CONSUMPTION
AND PRODUCTION



Closely working alongside fishers keeps our team grounded in their circumstances and day-to-day experiences. Therefore, when the pandemic first hit in 2020, we saw how aggressively their lives and livelihoods were upended by the ensuing shutdowns and the rapid deterioration of global seafood supply chains. What's more, we observed how relief programs were not always inclusive of those employed in the fishing sector.

We sprung to action to fill gaps where possible and to support our partners. At the start, this took the shape of PPE campaigns to keep fishers safe as they returned to the water. As time went on, however, we sensed that a shift from reactive to more adaptive responses was needed to ensure the resilience of small-scale fisheries in the long term. These observations supported a consultancy research project conducted this past year, "Global Impacts of the COVID-19 pandemic on the Seafood Industry."

For this project, our Global Innovations team applied a systems lens to analyze the complex and multifaceted worldwide impacts of COVID19 on the seafood industry. Across the diverse landscape that makes up the global seafood sector; fishers, communities, industry, and governments developed an array of strategies, innovations, and coping mechanisms to ensure survival— of their families, communities, and businesses. Some of these responses have been more successful than others; some worked well at the beginning of the crisis but are now perhaps no longer as effective. Within this shifting landscape, the Global Innovations team explored which trends emerged simply as stop gaps in a moment of crisis, and which changes were likely to last in the long term; exploring these patterns through an in-depth literature review and over two dozen interviews conducted with key seafood actors around the world.

In parallel to this body of research, a separate second consultancy report was simultaneously produced entitled, "Direct-to-Consumer (D2C) Strategies for Seafood: The Landscape, Challenges, and Opportunities since COVID-19"

examining how the seafood industry rapidly evolved to take advantage of a variety of D2C and e-commerce systems in response to the pandemic. Again and again, the Global Innovations team heard from interviewees how Covid-19 had accelerated the direct-to-consumer (D2C) trend in seafood, resulting in two products whose findings are complementary to one another.

Both reports are available in full in the resources section of our website, along with more streamlined executive summaries that highlight the team's key findings. We are excited to share these findings with our partners and welcome the opportunity to continue our work in the areas of industry research alongside pattern and forecasting analysis. Synthesizing complexity into actionable recommendations for seafood stakeholders is how we keep forward momentum in building a sustainable and resilient global seafood movement.



Connecting ideas to drive change

There is no silver bullet for systems change. Future of Fish's approach focuses on partnerships, innovations, and an iterative design-and-implement process. We believe in sharing our learnings in the process with the greater community as no one organization can shift a system alone. In 2021, our team had the opportunity to share our expertise, and learn from the expertise of others at a number of events around the world.



Finance

- Webinar on Unlocking Finance for Systems Change at the Seafood2030 virtual summit
- Blue Ventures Teko Telo event
- Too Big to Ignore's Small Scale Fisher Open House speaking on finance frameworks for small-scale fisheries.
- The published report 'Advancing Finance for FIPs'



Data

- Government of Norway's CatchID on the benefits of traceability to industry & specific small fishers
- GS1 Australia's GDST interoperability trials speaking about traceability initiatives supporting innovation in the sector
- The FAO's National Preparatory Dialogue speaking on responsible production
- Published the Data Modernization Toolkit



Building a just blue economy

- The Economist's World Ocean Summit Asia Pacific, speaking about catalyzing progress towards the Blue Economy
- The Undersecretary of Fisheries and Aquaculture's Second National Dialogue for Food Security and Seafood in Chile
- Bahamas Development Bank's Blue Economy Think tank
- The Institute for Food Safety and Health from the Illinois Institute of Technology on learnings from our work in Chile
- Global Washington's Goalmakers 2021 conference speaking to natural capital and livelihoods
- Conservation Alliance for Seafood Solutions presenting on the paths towards sustainability and climate change
- NOAA Ocean Observing Prize, Blue Economy webinar
- Sex in the Sea Valentine's date night



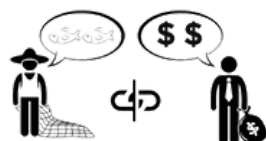
What's next

Future of Fish USA will be returning to its roots in 2022, focusing on how to innovate and scale global solutions through new partnerships while continuing to bring the most value to the coastal communities, economies, and ecosystems that we support.

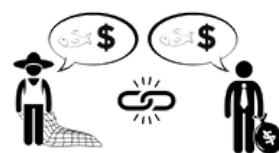
In this respect, we're excited to dig into two areas in more detail, digital services and producer finance, in the coming year. Questions we will be asking include: How can we bolster the creation of data-rich fisheries that improve resource management and contribute to product traceability? What types of financial resources can be unlocked to assist the countless unbanked and underbanked fishing communities around the world? How best do we bring fishers into the development of the emerging just blue economy? We at Future of Fish do not see these as separate questions, but as interwoven concepts that will advance in tandem as we identify new levers to support change. Learning from landscape and other systemic approaches applied in analogous resource-dependent industries, such as agriculture and forestry, we see immense potential for its application in fisheries. In 2022, we hope to test characteristics of these models in collaboration with stakeholders and partners in order to create fit-for-purpose fisheries-focused landscape approaches that supports community resilience and values traditional cultures.

If the recent COP 26 showed us anything it's that it is time to bring global leaders together to reimagine novel, innovative, and alternative economic models and systems that regard the well-being of our oceans and ocean-dependent peoples as paramount. Whatever risk lies in investing, with no way of knowing if we've already passed the climate change tipping points, we don't have another option. This is the moment for rethinking the fundamental assumptions of traditional economic development to start practicing a more intentional approach to a more equitable and just future. Now is the time to imagine a new vision for ocean stewardship for the future. Please join us in that journey!

Existing System



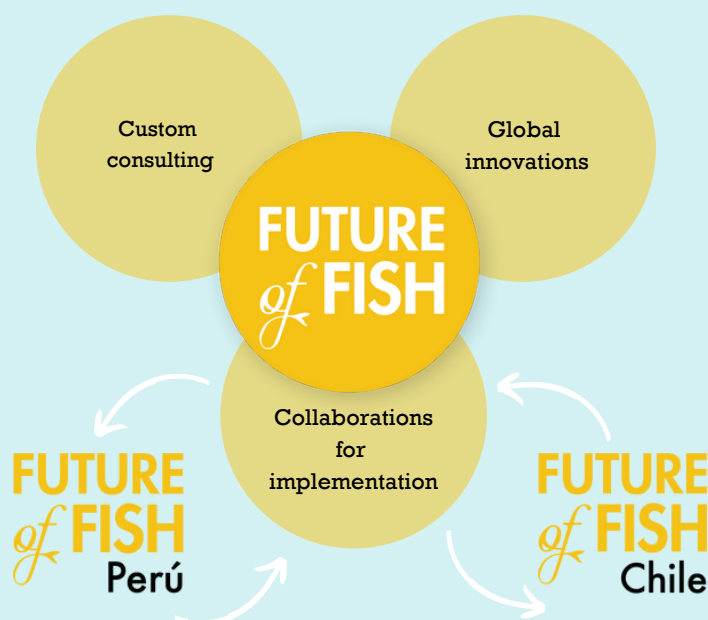
Ideal System



Build a Common Language to Unlock Investment

A global group of changemakers

Future of Fish is made up of three organizations and partnered with collaborators around the world. On a mission to scale impact and create change, Future of Fish partners with local organizations and NGOs to co-design and launch programs. Future of Fish Peru and Future of Fish Chile are two of our closest local implementation partners, piloting innovative solutions to implement regional solutions. The success and learnings from these pilots are shared with partners globally, identifying new potential areas for implementation.



Future of Fish USA team



Peter Battisti
Executive Director



Julie Budkowski
Director of Global Operations



Laura Fernández Cascán
Creative Finance Specialist



Marah Hardt
Director of Discovery



Momo Kochen
Director of Special Projects



Fiona Lugo-Mulligan
Director of Traceability Programs



Stephanie Stinson
Communications Manager



Gretchen Thuesen
Program Manager



Jenni Ahern
Program Director

Future of Fish Peru



Karen Ayala Pazo
Program Coordinator



Alejandra Cárdenas Huerto
Community Engagement
Manager



Rocio Maldonado Alarcón
Gender and
Monitoring & Evaluation Specialist



Cindy Marchán
Operations Coordinator



Mauricio Zúñiga
Quality & Commercialization
Manager

Fundación Future of Fish Chile



Claudio Barrientos
Research Associate



Iván Greco
Research & Implementation Lead



Begoña Peñailillo
Caleta Engagement Manager



Diego Undurraga
Country Director

How to get in touch

Interested in working together? See the potential for partnership?



Connect with us at info@futureoffish.org