Future of Fish

The Executive Summary

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Introduction

The Future of Fish project was a unique partnership between Ashoka, The David and Lucile Packard Foundation, and Central, a design strategy firm. Its goal was to find new, market-based solutions to drive increased demand for sustainable practices in the seafood industry.

To do that, we combined Ashoka's deep knowledge of the entrepreneurial mindset with design thinking, a problem-solving approach that relies on ethnographic research and rapid prototyping. The result was a methodology we believed would identify the most powerful levers of change in the field, and then provide a path to invent a new solution to effect systemic change. The project team spent 18 months analyzing the work of innovators, conducting anthropological observation in four countries, and synthesizing that research into a theory of change and a prototype of a new business.

This project's premise was that the environmental and social challenges caused by complex systems need unexpected approaches that require foundations, companies and the public sector to partner in new ways.

We hope that The Future of Fish will serve as both a means to a solution and a platform for a next generation of partnership.
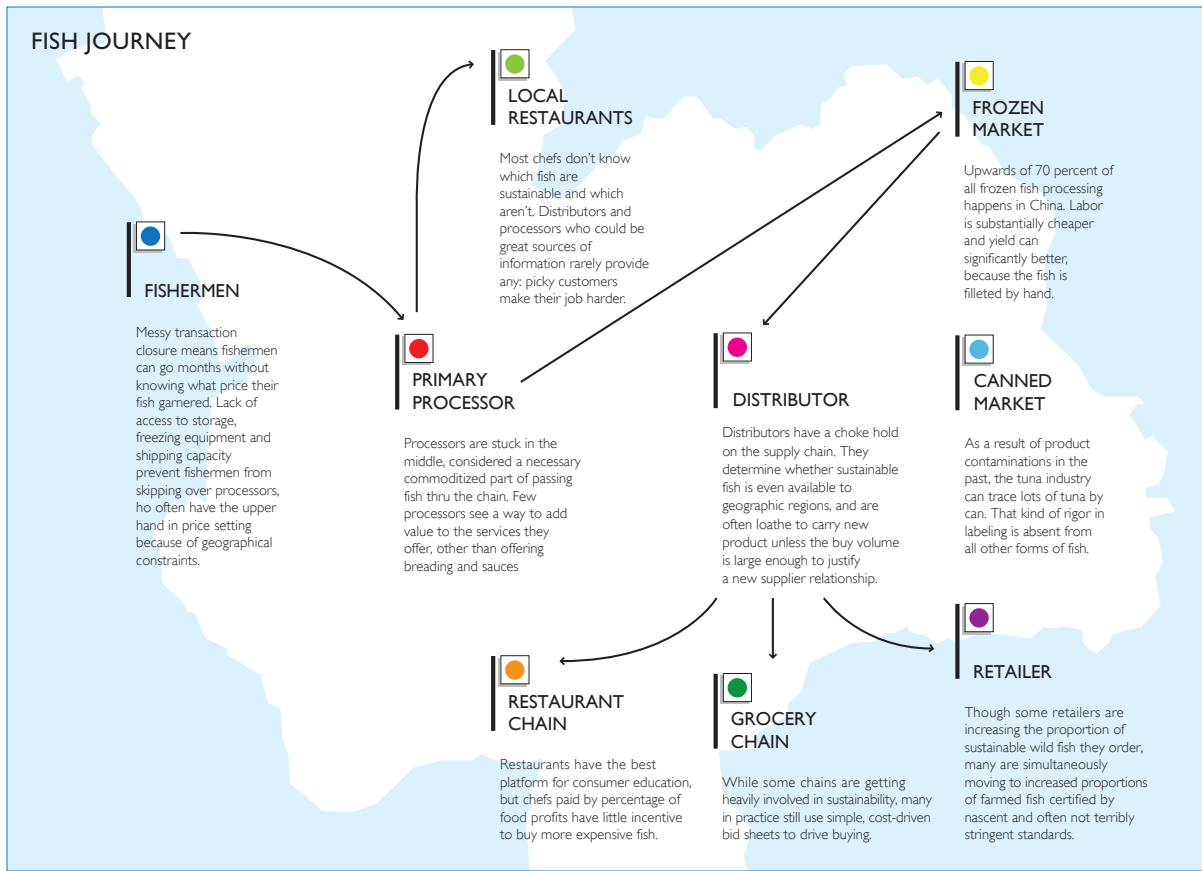
THE PARTNERS & PROCESS

The David and Lucile Packard Foundation was created in 1964 by co-founder of the Hewlett-Packard Company, and Lucile Salter Packard. Throughout their lives in business and philanthropy, the Packards sought to use private funds for the public good, giving back to a society that enabled them to prosper. This project was sponsored by the Marine Fisheries Program of the Foundation.

Ashoka is the global association of the world's leading social entrepreneurs—men and women with system-changing solutions for the world's most urgent social problems. Since 1981, Ashoka has elected over 2,000 leading social entrepreneurs as Ashoka Fellows, providing them with living stipends, professional support, and access to a global network of peers in more than 60 countries. Ashoka develops models for collaboration needed to advance the field of social entrepreneurship.

Central is a design strategy firm that works on complex problem solving for organizations both large and small. Central partners with clients to uncover human needs and co-create innovative solutions for impact.

Ashoka's approach to framing change is based on almost 30 years of finding and funding social entrepreneurs working on challenges ranging from eliminating human trafficking, to preserving fisheries. In the first phase of research and framing, the Ashoka team applied those insights to the multifaceted challenge of sustainable fishing. The resulting frameworks were published in the Phase One report, available at www.futureoffish.org.

The next phases sent anthropologists into the supply chain to retrieve rich information to inform solution design. The project spanned from Fall of 2008 to Fall of 2009.

FISH JOURNEY

LOCAL RESTAURANTS

Most chefs don't know which fish are sustainable and which aren't. Distributors and processors who could be great sources of information rarely provide any: picky customers make their job harder.

FISHERMEN

Messy transaction closure means fishermen can go months without knowing what price their fish garnered. Lack of access to storage, freezing equipment and shipping capacity prevent fishermen from skipping over processors, ho often have the upper hand in price setting because of geographical constraints.

FROZEN MARKET

Upwards of 70 percent of all frozen fish processing happens in China. Labor is substantially cheaper and yield can significantly better, because the fish is filleted by hand.

PRIMARY PROCESSOR

Processors are stuck in the middle, considered a necessary commoditized part of passing fish thru the chain. Few processors see a way to add value to the services they offer, other than offering breading and sauces

DISTRIBUTOR

Distributors have a choke hold on the supply chain. They determine whether sustainable fish is even available to geographic regions, and are often loathe to carry new product unless the buy volume is large enough to justify a new supplier relationship.

CANNED MARKET

As a result of product contaminations in the past, the tuna industry can trace lots of tuna by can. That kind of rigor in labeling is absent from all other forms of fish.

RESTAURANT CHAIN

Restaurants have the best platform for consumer education, but chefs paid by percentage of food profits have little incentive to buy more expensive fish.

GROCERY CHAIN

While some chains are getting heavily involved in sustainability, many in practice still use simple, cost-driven bid sheets to drive buying.

RETAILER

Though some retailers are increasing the proportion of sustainable wild fish they order, many are simultaneously moving to increased proportions of farmed fish certified by nascent and often not terribly stringent standards.

FISH (what's the problem?)

Fish are in decline for many reasons. The biggest is overfishing. We take so many fish over such a short time that a particular stock can't bounce back. Upwards of 80 percent of the world's wild fisheries are either overexploited or being fished to the limits of their ability to sustain.

Destruction of the marine environment is another culprit. Some of the methods we use to harvest fish destroy the habitats where fish live. Bottom trawling, for example, is tantamount to bulldozing the ocean floor.

Many groups are pressing governments and fishery management councils worldwide to better regulate the quotas, or legal limits on fish catch. But illegal fishing remains a significant problem because of poor regulation and enforcement. .

There's also a move to push consumers to eat only fish species verified to be "sustainable." But there are many different definitions of sustainability. Typically it encompasses two

factors. Fishery health: Is this fishery harvested at a rate that allows the species to thrive? And, catch method: Was the fish captured using gear that doesn't kill lots of other marine life (birds, turtles or other fish)? For example, depending on how and where it is caught, a pound of wild shrimp can result in more than 67 pounds of this kind of collateral damage, known as bycatch.

And, there's not enough sustainable fish to fill demand. Certified sustainable fish represents only about 10% of all wild fish caught and sold today.

While fish farming offers the lure of growing more fish to offset the pressure on wild fish, the industry hasn't yet figured out how to grow more fish without causing other environmental problems.

For all these reasons, the future of fish is an important and difficult conundrum in need of new solutions.

RESEARCH: Phase One (what's working and why?)

The approach to the initial research was shaped by Ashoka's perspective on the importance of social entrepreneurs in any given complex system. These pioneers (whether their ideas are for-profit or non-profit) identify both the specific problems that exist in a system, as well as potential levers for change. Because social entrepreneurs typically base their ideas on personal perspective and close observation, analyzing their theories of change are an effective way of looking for patterns and larger truths in a system.

This approach is inherently optimistic, as it builds on successful solutions. It is also qualitative, using pattern recognition to build a subjective framework, or lens, to understand the system. Selection of the solutions we studied was based on expert recommendation and some evidence that a solution had merit and had achieved some progress toward its goals. However, this was not a quantitative assessment, so we did not use metrics from our analysis.

We looked at social entrepreneurs addressing three distinct parts of the problem: persuading consumers to buy more sustainable fish, persuading buyers (for retailers and restaurants) to purchase more sustainable fish, and persuading fisheries to adopt more sustainable practices. We looked at these solutions clustered among these three segments, and then also looked across the chain.

From those insights and from the trends we saw across all three analyses, we chose to pursue a solution that would address processing, the middle of the seafood supply chain.

Our chief reasons for that choice were:

Little energy has been expended looking at, or trying to drive the sustainability of, seafood processors. Most of the solutions we examined in both the for-profit and non-profit categories were targeted at other players in the supply chain. We wanted to dig into why that was true.
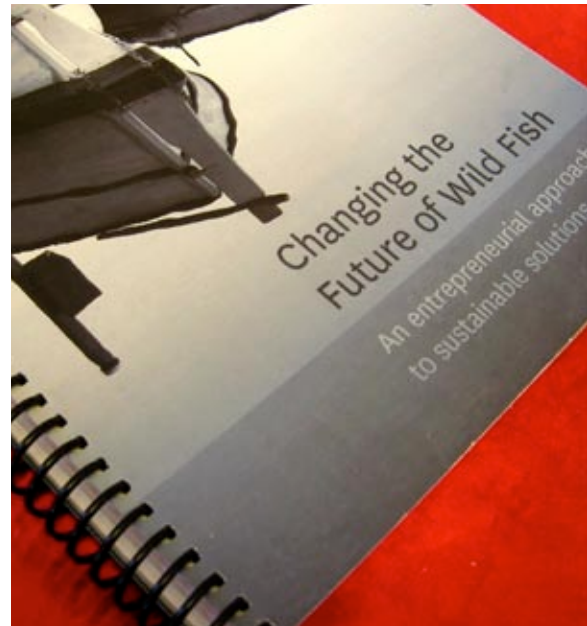
The reach of the processing industry is global and systemic. Most seafood processing now takes place in China and Southeast Asia. Huge amounts of fuel and time are spent shipping fish from the developed world to the developing world, where the wage differential still offsets the transportation cost. Any solution in this space could potentially have massive reach.

The drive toward direct markets flags the middle of the chain as a "stuck" point. Most important, we felt that our observation about the immaturity of the supply chain meant that change efforts that both targeted fishermen, as well as retailers were stymied by the layers of players who were unwilling or unmotivated to transmit that change. *Potentially, addressing the problems in the middle of the supply chain could make all other efforts measurably more effective.*

RESEARCH: Phase Two (in the field)

Based on our chosen opportunity area of processing, we decided to study interactions between processors and the players above and below them in the supply chain. So we looked for fishermen, distributors, processors and merchants (retailers or restaurants) willing to let us send anthropologists to observe them.

Our goal in selecting specific companies was not to create a representative sample of a typical global seafood supply chain. Rather, we looked for extreme cases that would be more useful for us to design around: processors in China with huge fish volume; distributors whose views on sustainability ran to either extreme of support or refutation; small, family owned fishing companies; chefs who championed sustainable seafood.

This is one of the tenets of the design process: Extreme cases produce better

insights because the behaviors, needs and scenarios are a more pronounced version of the average. Thus, in designing for the most demanding situations and users, the basic needs of many can be met.

Our research took us to four different countries and eight sites. We sat next a fish broker making calls to his suppliers at 4 a.m.; we watched fishermen strip 2,000 lbs of fish out of gill nets before selling them to a processor; we watched Chinese workers gut and fillet fish in a processing factory; we observed a sushi restaurateur interview waiter candidates; we helped a tank aquaculture farmer feed his crop of fish.

In each of these situations, we looked for the context, beliefs and activities that shaped supply chain behavior.

Synthesis distills research into parameters and perspectives that help the team understand how to design successful solutions for a system.

We looked for patterns: Where are the common behaviors of people at all levels of the supply chain? What repeated problems surface in the stories our interview subjects shared about what they believe and why?

We looked for inconsistencies: Do people say they behave in a way that their actions belie? Are certain roles, habits, rules or customs in the system generating unintended consequences?

We looked for unspoken assumptions: What norms do people understand— consciously or implicitly—that shape their beliefs about what's possible? Here are some insights that surfaced:

1 Demand bullies supply

What we saw

In the pre-dawn hours one spring morning, we sat next to a salesman for a national seafood distributor at his desk and listened to him call customers and suppliers. His job was to figure out—what's going out, what's coming in for the day. The language of the calls was an insider's shorthand: numbers mixed with names of oysters and fish species, pretty much indecipherable to a novice.

He explained the counts that various types of shellfish came in, noting with each how many the company had sold the previous week and what was left in inventory. These were numbers he had memorized. "That's just knowing your inventory," he said. At several points he asked suppliers: "Do you know what you sent me yesterday so I can...cool. Can we do it again for... alright that's all I can ask."

A recurring theme of "I want what I had yesterday" was observed many times during sales calls. Whether the customer was a restaurateur, a grocery store chain, or a distributor, there was immense pressure to deliver steady supply of a known item.

That was completely at odds with what we saw when we observed fishermen deal with the instability of the unpredictable hunt. One boat we observed went out for a quick morning run, estimating that it might catch 200 lbs of fish. Instead, the boat hit a large school of fish and wound up taking in 2,000 lbs. The difference meant many more man-hours of labor to remove the fish from the net, as well as a cagey dance with the processor over a cell phone to try to establish a sale before revealing what a glut of fish the crew had landed.
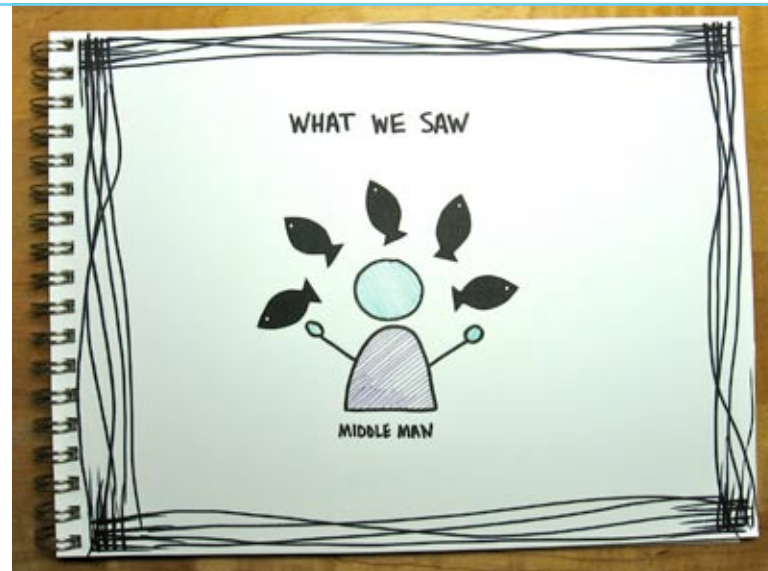
We also observed that the lack of clear transaction closure favored those lower in the supply chain. One distributor pressured a processor to drop the price on fish that had already been shipped, since the price had since dropped in the markets. We also talked to distributors who saw no problems with a system that gives fishermen claim tickets for their catch and kicks out a price sometimes months later.

What it means

We saw many instances where players in the middle of the supply chain reacted to "even out" the shortfall or overabundance of supply, by dipping into one company's order to fill another's or by knowingly shipping the wrong fish (figuring it would be too much bother for the customer to return it). We also heard plenty about the purposeful mislabeling of fish to fill demand, though we didn't witness that firsthand. All of these are ways in which

the middle of the chain prevents the message of scarcity from reaching customers, be they merchants or restaurants, and eventually consumers.

The middle of the chain is so focused on meeting demand; it rarely chooses to push back on requests. The actual true inventory of fish is invisible, under water. (And the marine science to determine fish stock levels is mired in endless debate.) Instead, industry gears its daily operations to whatever came up in the net that day, or the previous day. In other words, demand bullies supply.

We did see cases in which players made substitutions: In one example, a seafood salesman set up a sales call for a new supplier with a restaurant chain. The supplier the restaurant had previously specified had proven unreliable. "I had to throw him under the bus," the salesman said. This was not on behalf of a more sustainable choice, just one that made the salesman's job easier. Still, it was easy to see the sway that the middle of the chain holds with customers who typically know little about what they're buying.

Why it matters
The middle of the chain currently serves as a dumb instrument of demand, relaying requests from the end of the supply chain. Most players see their competitive advantage as offering assured supply (something the Chinese processors we observed were quick to emphasize). And their distinction was based on reliability. One processor told us what made him better than his competitors was that he monitored incoming and outgoing fish "minute-by-minute" and spent the time on his cell phone to prove it.

But none of the middle of chain players we spoke with saw information as a point of leverage or advantage, even though they selectively used information to persuade customers toward and away from particular fish regularly. If these players saw themselves as being in the information business, rather than the fish business, that would likely shift their behavior drastically. As one processor presciently put it: "We're all selling the same piece of dead fish."

2 Daily catch mentality rules

What we saw
People involved in key positions in the middle of the supply chain spend all their energies focusing on the day's transactions. Like the salesman who had his inventory numbers memorized, most of these individuals carry a vast amount of irreplaceable knowledge in their heads. It was clear that a new person entering these transactional roles would have to apprentice with a old hand to have even a chance of keeping up.

Most of the information systems that we saw involved heavy use of manually entered data: spreadsheets sent via email. Serving as the human stopgap in cases of short supply or botched logistics, these experienced personnel often had no time to consider anything other than daily sales. And each day, they arrived at work to do it all over again. "I'm here every day," one salesman

THE DAILY CATCH MENTALITY

reassured a customer whose order he had just fixed. "Don't worry."

We dubbed this phenomenon the "daily catch mentality." Each employee is stuck in a time horizon of goals and plans for just one day.

What it means
The obvious cost of having so much of the business focused on daily transactions is that there's little time or energy left to consider long-term goals or threats. The future scenario that sustainability represents (i.e. the total collapse of industry) is lost in the struggle to move the fish.

Any conversations about how the business model might be improved, how operations might be more efficient, how a company might respond to shifting trends, simply take a backseat to the daily checklist.

Why it matters
Front line employees are often the ones who come up with innovations that change the way business works; but in this industry, the daily catch mentality inhibits that kind of thinking. We met many smart, impressive, resourceful people who, if their companies were demanding it of them, could help innovate the way to better logistical, tracking and storage systems. But their job is just to move fish every day.
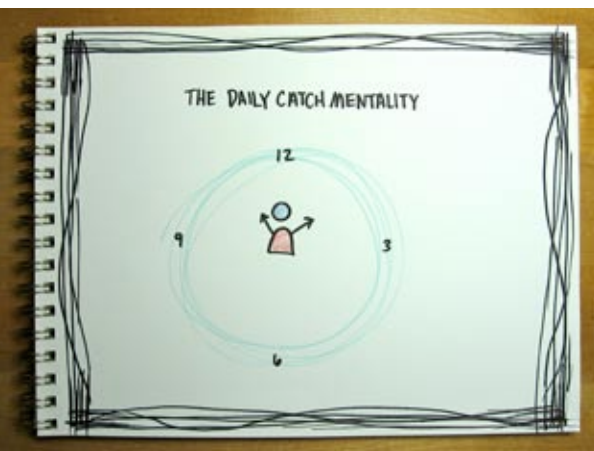
3   Story & platform are a critical pairing for change

What we saw

We interviewed one salesman for a distributor whose sole job was to sell sustainable fish. He loved to tell long, involved stories on the phone to his customers about the origin of each fish: which family business caught it, how it was caught, the preservation methods used and how those affected the quality of the fish. He was into, as he put it, the "long story long," of sustainability whenever he could share it.

But some of his customers, typically larger grocery or restaurant chains, didn't interact with him on the phone. Instead, they faxed bid sheets with empty boxes next to labels like "White Fish Fillet—Jumbo." They wanted the price. That was all, thanks. In those cases, the salesman admitted, that if he even penciled in catch information in the margins, the form would be sent back to him. "You're just going after what you can do pricewise to win the bid," he said.

This salesman struck us as a good example of someone with good story – in other words, he has the information and data he needs to make a persuasive case – but doesn't have much platform, a powerful place to tell that story.

Throughout the supply chain, we traced this question of: who had good story and who had good platform. We found that not many people had both. But those who did were having an enormous influence on changing behavior.

One fresh fish market owner we interviewed told us he regularly gets up at 5 every morning to study the Monterey Bay Aquarium lists on sustainability and to read newsletters about wild fish and aquaculture. He hand writes labels for the fish in his counter display indicating how each was caught and where it came from. He can answer any customer question about fish, farmed or wild. And customers always take his advice on what to buy and how to prepare it. As he says, "I have more power than consumers in driving sustainability."

What it means

We think people with both story and platform are well positioned to inspire change. Thinking of the equation for change in that fashion can also lead to a way to design systems. Story doesn't have to be a narrative told in person. Story can be contained in data collected over time. Platform doesn't have to be a live audience or consumer. It can comprise users of a particular database or IT system. The important point is that these two elements must be coupled to have the most potential to effect change.

Why it matters

The sector tends to think of champions of sustainability as individuals who tell compelling, emotive stories. The sector has spent less time investigating—who are the players with platform, who might be moved for reasons other than a "moral" commitment to sustainability to engage in storytelling or data dissemination?

# 4 Innovators are stranded

What we saw

We met many innovators in business that had great ideas that tackled core problems in this system. They seemed to share a sense of frustration that their ideas had not been met with much enthusiasm by the NGO world, nor were they able to get the traction they needed to scale or replicate.

One fish farmer we interviewed lamented that he couldn't get support from either financial world—traditional banking or the non-profit domain. He was technically a for-profit, so not eligible for a grant. But as a small family farm, he was not an attractive bank loan candidate. Meanwhile, he's pioneered some of the most interesting solutions to pollution and feed challenges that we'd seen. "We're so far outside the box, that I don't know anyone I can ask for help," he said.

While some entrepreneurs in this space are experiencing the typical challenges endemic to starting small companies, we were struck by the degree to which these innovators, whose ideas are so desperately needed by the industry, were met with indifference or worse from the NGO community. Ideas deemed to be imperfect solutions are jeered; innovators who'd made progress in fixing the weaker aspects of their ideas reported that they'd been exploited as "poster children" to deride other entrepreneurs about their shortcomings.

What it means

Innovators who want to connect with each other, learn, or get support (financial or otherwise) have
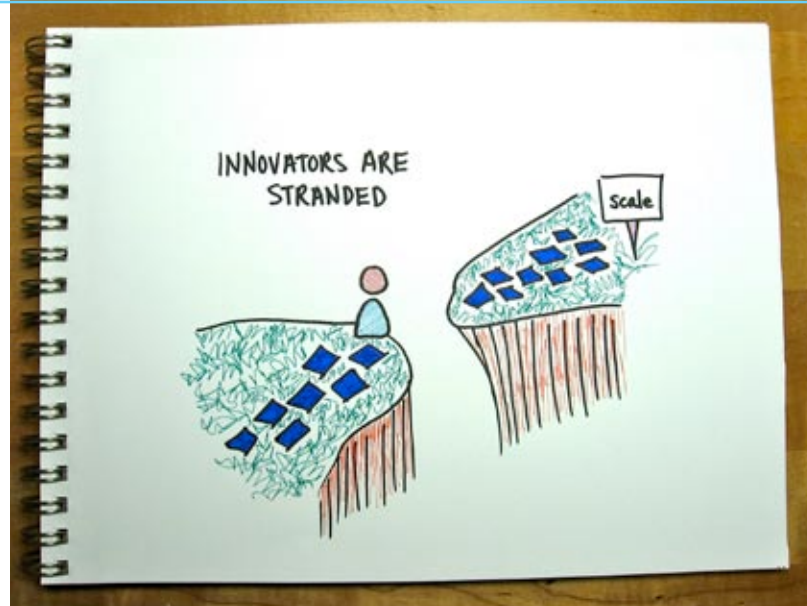
nowhere to go. There's not an organized venture community around the seafood industry. Ultimately, it means the evolving best practices around information, aquaculture, traceability, or technology aren't scaling and becoming competitive forces in the market. This strikes us as a system failure, more than just a challenge to be overcome individually.

Why it matters

A weak culture of innovation inside established companies, as well as weak systems for scaling and supporting entrepreneurs, results in a dearth of new, impactful ideas. This is a dangerous situation to perpetuate in an industry that, more than most, must innovate its way out of a crisis in a fairly short timeframe.

PROBLEM AREAS

During our synthesis, we identified more than 130 individual "problems" with the system of how fish goes from ocean to plate. We named every possible flaw we had seen through our 140 interviews in the length of the project. We clustered those in the most compelling and important categories. We winnowed those to identify two problem areas to target our solutions.

Industry has difficulty innovating at scale

The culture of established companies doesn't encourage or require innovation. Entrepreneurs who develop ideas on the fringes of established industry have a hard time securing the connections and support they need to scale. Together, these two incapacities lead to a dearth of sustained, scaling innovation in a field that desperately needs to invent its way out of imminent collapse.

Heroics are required to keep fish coupled with its origin and catch information

Right now, the series of players in any given fish supply chain do not routinely carry catch and origin information along. Cases where this information is provided are either situations where someone at either end, a fisherman or a merchant, has disintermediated the middle of the chain. We must either find a way to scale these disintermediated chains, which currently reflect mostly local, small supply chains, or force the middle of the chain to shift its practices.

USER TYPOLOGIES

As we surfaced patterns in problems and observations, we also looked for threads of commonality in the mindsets of people we interviewed. Better understanding the types of people most prevalent in our system would help us target more appropriate solutions to them. We made clusters of the myriad executives, fishermen, farmers and sales folk we interviewed and developed a framework:

Based on the differences we saw, we created two rating spectrums. We looked at "flexibility," which we defined as one's disposition toward change. The two extremes on this continuum are "status quo/insiders" and "next generation/outsiders." The other category we named "field of view," which we defined as the scope within which players frame their actions. Do they understand their own significance and effect on a larger system, or are they concerned only with how they can control and influence their own circumstances? The two extremes on that spectrum were "systemic thinking," those who specifically link their actions to something larger than themselves, and "daily transactions," for those whose framework of concern is narrow and driven by practical, immediate needs.

By charting these two axes against each other, we were able to identify four mindset groups:

COUNSELOR: Counselors are excellent advisors and are typically in positions such as marketing or sales in which they are providing guidance or information. They aren't interested in bucking the system or environment they're in, though they can often be strong advocates of sustainability within their spheres. They typically lack the type of position or platform to make huge change, but they have excellent story.

CATALYST: These people are entrepreneurs. They are more likely to be at the helm of startup ventures aimed at improving sustainability or solving some other systemic problem they see. They don't work inside big companies or seafood industry giants. They set trends and focus their work intentionally around making change.

CONDUIT: These players are highly organized and focused on details. They are dealmakers who set in motion the transactions that keep a business running. They are absolutely reliable and carry vast amounts of knowledge and history in their heads. Conduits typically work in key positions inside big companies and are the "go to" people that others seek out to get things done. Conduits have wide and substantial platforms, but rarely have story.

COMPLIER: Compliers are fixers. They are innovative, but on behalf of problems at close range within their personal spheres. They don't identify as "pro-sustainability" but could easily walk down that road, if another reason related to self-interest proved compelling. Most players in this category were fishermen, or Chinese processors.

Using these categories, we created design principles to identify the result we wanted our solution to generate.
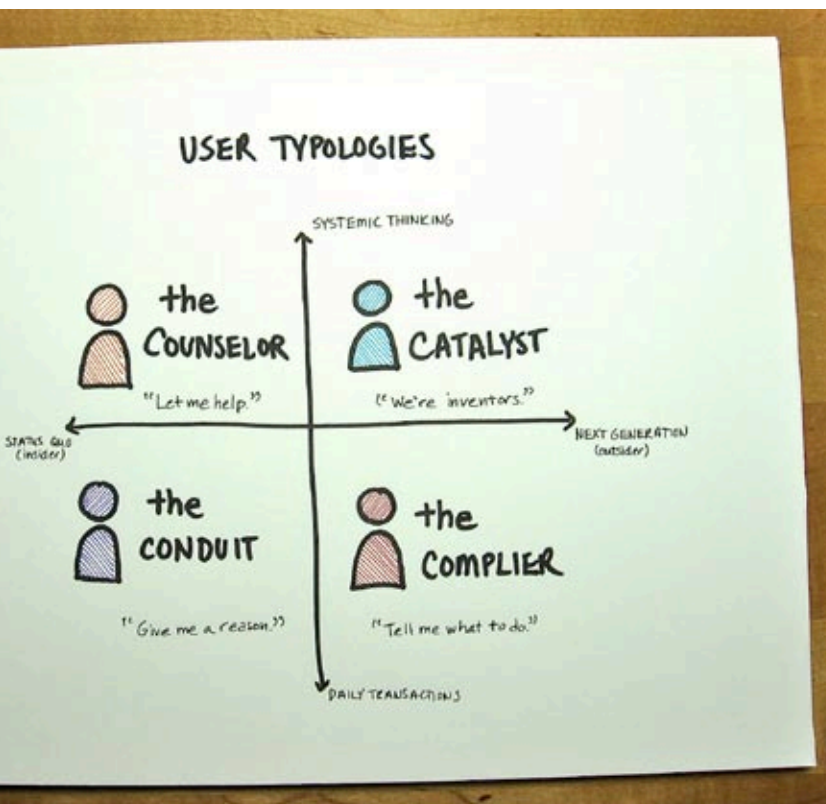
DESIGN PRINCIPLES

All of the design principles involve moving people along their "flexibility" spectrum. For those who are at the high end of that range, we want them to be able to touch less flexible systems and work within them more effectively. Those at the low end, we want to drive to reach slightly outside their comfort zone to connect with innovators.

Give counselors a path to incorporate new ideas. Counselors need to connect with ideas, people and organizations that can help expand their thinking around the possible ways they might be a more powerful advocate for change. For counselors, this fundamentally will have to do with platform – who are they reaching and through what channels? How are those channels designed and what reach do they have?

Give catalysts a path to embed their ideas in the mainstream. Connect catalysts to the support, knowledge and structure to grow their ideas to a more significant impact. This is also about platform: How powerful of a business has the catalyst built as a mechanism for change? How might it become bigger and more powerful?

Give conduits a taste of practical innovation. Conduits need motivation (i.e. story) to help them see how to use their platform differently. They have tremendous reach and power. It's just a matter of inventing (or revealing) an incentive for them to change focus.

Give compliers a better script. This group is perfectly happy to function and excel within a given set of boundaries. Those boundaries need to be shifted. They need a new story that connects their self-interest to the bigger picture.
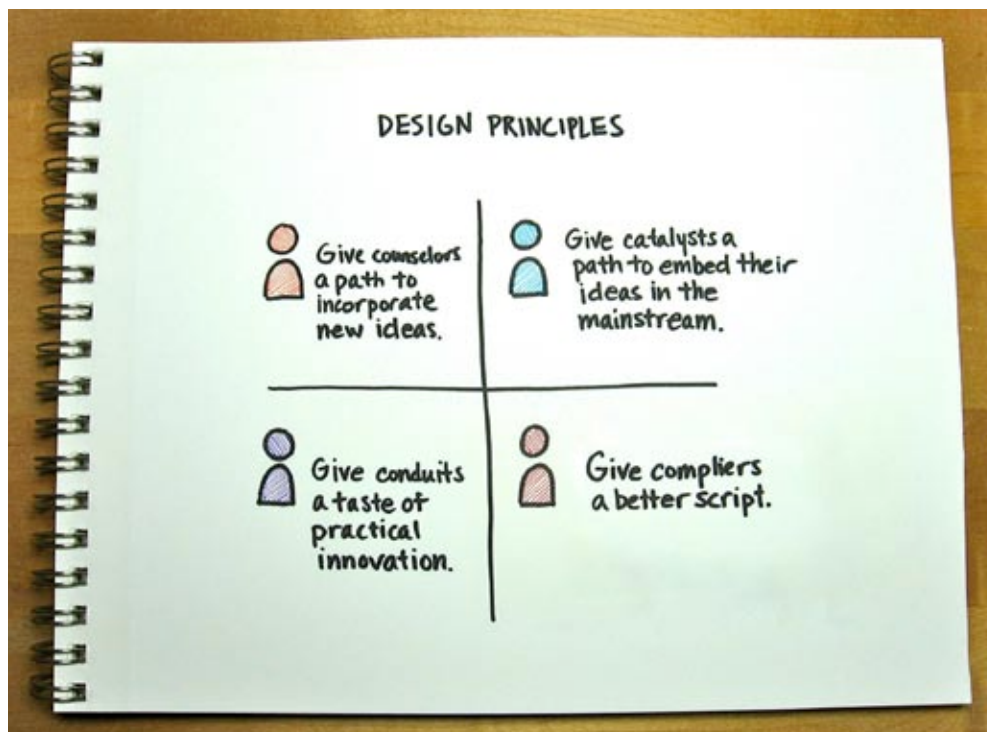
THEORY OF CHANGE

One of the thorniest questions we explored in this project was: What makes a solution systemic? Is it scale of impact? Eliminating a system stuck point that then makes more significant change possible? Changing a core process that drives behavior shifts for many groups? In any of those cases, how could we drive toward these scenarios with a single intervention?

As we considered these questions, we began to shape an opinion about the criteria we might use to recognize a systemic intervention.

These criteria led to the recognition that, based on the problem areas, we needed to devise not simply one new business idea, but an idea that helped address the innovation conundrum at a higher level—an idea that made all other ideas more likely to have an impact, more likely to scale, more likely to succeed.

We used this thinking as a way to calibrate the likely systemic impact of the solutions we brainstormed.

Counter Intuition: Make the Problem Bigger

As we considered the forces that would drive the success of any solution, we carefully considered the notion of stakeholders: who's vested in seeing this solution succeed? Who would bring brains, money or goodwill to the table to help it get off the ground? In exploring that, we found ourselves very quickly at the conclusion that in order to make the solution bigger, we needed to make the problem bigger.

In other words, we had defined our problem up to this point, as a fish problem. The system we were looking to affect comprised the processes that determine how fish goes from ocean to plate. But, of course, a host of other systems are in constant collision and interaction with that one. In aggregate, the stakeholders addressing problems from overlapping systems form a larger group than those concerned more narrowly with "just fish."

Additionally, we began to see other intriguing system links. For example, many of the good ideas we saw already in the marketplace were for-profit companies with explicit missions around sustainability. The challenges they faced in securing funding as hybrid companies, which often can't produce market-rate return, yet frequently flummox the non-profit world as an investment

opportunity, weren't unique to companies with big fish dreams. Any hybrid or so-called "for-benefit" companies struggle with these issues. So we looked at the funding structures, support systems, and framings that drive the use of social enterprise as a tool for change.

Ultimately, we saw the opportunity to make the problem bigger by offering significant solutions in four areas:

FISH: Build better competitors by incubating game-changing ideas and technologies, helping existing players to scale or convert to sustainable practices, and driving a conversation that highlights successful innovation.

SOCIAL ENTERPRISE: Be part of the movement to build a more coherent market for hybrid companies by creating a long-term systemic vision for change, educating funders, and creating deal flow on a platform that welcomes for-profit and non-profit investors.

PHILANTHROPY: Create a rigorous, repeatable and documented process for foundations to engage in Research & Development to incubate new strategies for social change.

"PLUS" ISSUES: Draw attention, money and intellectual capital to collaborate on behalf of holistic, integrated approaches to problems generated by overlapping systems and silos of philanthropic funding.

SOLUTION (an innovation hub)

We began with this target: Come up with a business idea that will help solve the sustainability challenge for the seafood industry. But we discovered along the way through our research that many insightful ideas and small innovations were already underway, aimed at doing exactly that. The problem in the industry was not a shortage of good ideas—rather, that these solutions weren't attaining scale or having systemic impact.

We ultimately realized that we needed to go beyond a new company idea, to create an idea that would make all ideas in the field stronger, bigger, and more effective.

What we designed is an Innovation Hub that would be a breakthrough-accelerator for industry. The hub would relentlessly support entrepreneurs in overtaking outdated, inefficient and unsustainable players and practices, taking on the role of both kingmaker and king-killer. It would create targeted, efficient and powerful industry competitors whose practices spark a reinvention that supports and drives sustainability.

What would a world with an Innovation Hub look like?

• The "alternative" supply chain that small-scale pioneers have invented to circumvent unsustainable players would scale to become a competitive threat to dominant channels.

• Inventors, pioneers and entrepreneurs—currently the orphans and outcasts of the industry—would have a home, a network, and a platform to meet, exchange ideas and get what they need to grow.

• Best practices that exist in many local fish supply chains would come to define the whole industry.

• Advocates of sustainable fish would learn new ways to connect their work to other social goals, including preserving livelihood, driving economic revival and public health.

In sum, this hub would respond to the demands the market is already making for a means to connect and scale innovation. The team envisioned four ways in which the Innovation Hub could become "connective tissue" for the field:

ACCELERATE – The hub would convene pilot projects among existing innovators to ramp and expand their insights and impact. This catalytic function of the hub would be an elite innovation boot camp for those with proven ideas and appetite to scale. The goal of this unit would to make existing competitors more sustainable and make sustainable competitors more of a threat. Primarily, these collaborations would entail pilot project that link hand-picked players in the supply chain to create new technologies and new practices.

INCUBATE – The hub would invent and launch start-ups whose ideas support a strategic, ecosystem-driven vision of industry reinvention that supports sustainability

DISSEMINATE – The hub would knit together entrepreneurs, industry players and appropriate NGOs into a learning network dedicated to creating and sharing best practices. This networking and publishing function would provide a "home base" for innovators, who now largely navigate the challenges of fundraising, scaling, and finding partners alone.

INTEGRATE – By expanding the targeted and defined "problem" to include other social issues the hub would recruit change agents from multiple sectors to support and aid its efforts.

A detailed business plan with specific ideas for pilot companies and collaborations has been submitted separately to The Packard Foundation in a private report.

CONNECTING TO NEW PATHS
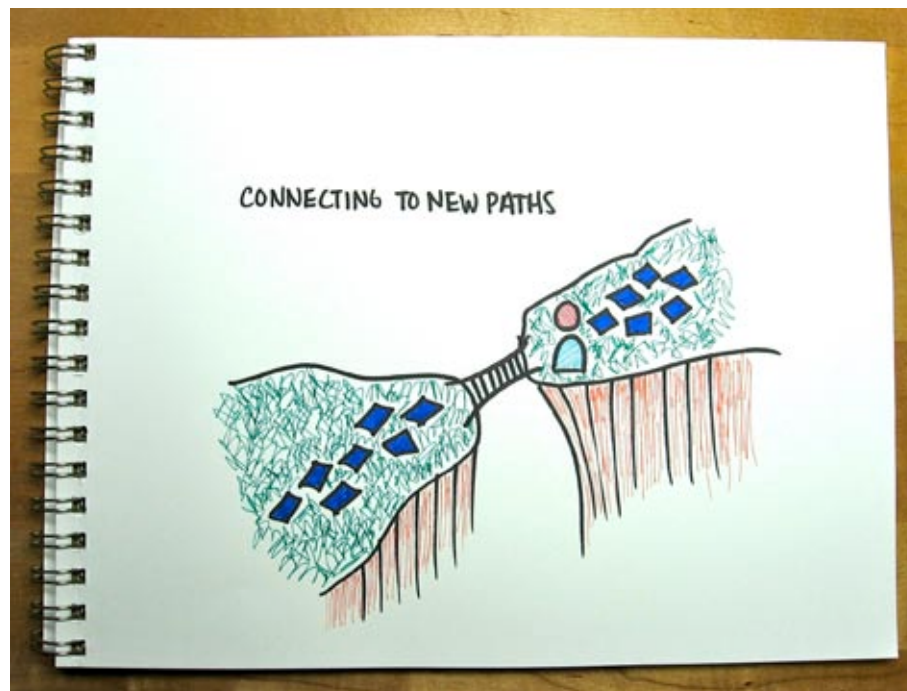
WHAT'S NEXT (concept testing)

The Future of Fish concept test is rolling out elements of this solution to prove their viability. The effort will find new ways for seafood companies—particularly those in the middle of the supply chain—to profitably support sustainability. We're looking for opportunities to enable new partnerships and connections that unleash bigger solutions with new funding sources, and a realistic shot at creating systemic impact.

To that end, we're developing a platform that will constitute a new form of "connective tissue" for the field: a different lens to frame the challenge, a new way of engaging in problem solving, a powerful way of amplifying the already impressive efforts of entrepreneurs working on the issue of sustainable fish. Two core initiatives are:

New Venture Summits. This event convenes an elite group of businesses in the seafood industry to explore: What are opportunities for innovation or improvement in supply chain operations that generate net benefits for sustainability as well? Over the course of a year, this group will engage in a breakthrough co-entrepreneuring program that offers unique partnership opportunities, support for long-term strategic thinking, as well as fundraising assistance.

The goal is to generate 2-4 business plans or operating partnership agreements among the participating players that can draw investors, as well as create seismic shifts in the supply chain.

Fish and the Food Desert. This project is uncovering stakeholders whose primary interest is not fish, but whose goals and strategies dovetail readily enough to become key allies. By partnering with advocates of local food sourcing, community supported agriculture, and the organics movement, we hope to discover strategies to "import," as well as new ideas that allow for a more holistic, integrated approach to problem solving.

The challenge of the food desert in urban areas (the lack of access to healthy, unprocessed food for the inner city poor) encompasses core issues that the sustainable fish community must also address: reinventing existing supply chains, introducing consumers to unfamiliar products, and looking for ways for networked small businesses to substitute for scale.

Our belief is that partnerships that embrace solutions which are about "more than just fish" will create both a larger pool of funding and stakeholders, as well as a conversation that more appropriately integrates sustainable fish with other human and social challenges. Our goal is to attract a group of entrepreneurs and advocates in the overlapping spaces of fish and food desert to launch a New Venture Summit Series on this topic in the future.
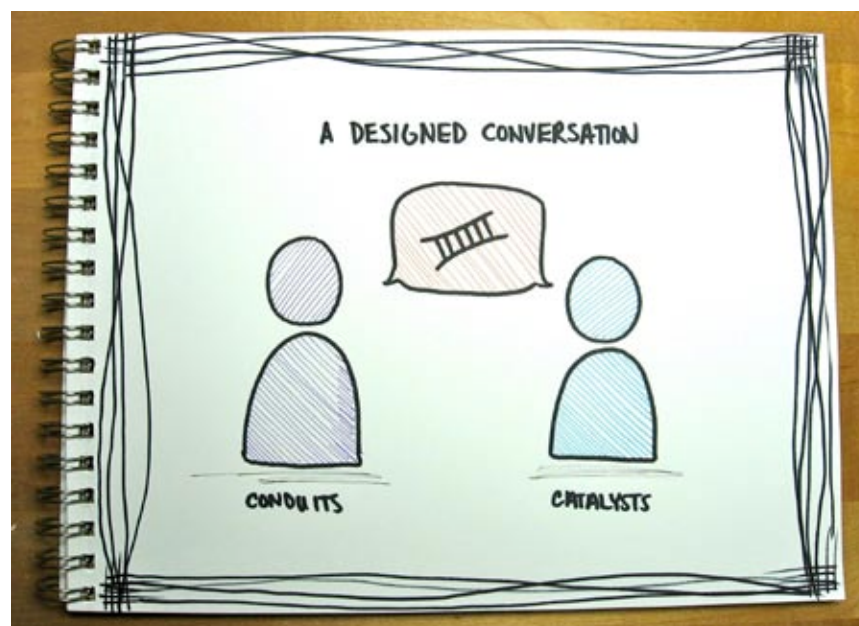
CONCEPT TEST TEAM

Cheryl Dahle, journalist & entrepreneur.

Cheryl has worked at the intersection of business and social transformation for more than a decade. She has an extensive background in analyzing complex systems and devising multi-stakeholder solutions. She puts these insights to use in disparate projects, from incubating new companies to creating media content. Her current focus is the Future of Fish project, an initiative to tackle challenges facing marine fisheries and the seafood industry in part by scaling the work of entrepreneurs. Prior to her work with fisheries, she was a director at Ashoka, where she created a consulting product that distilled knowledge from the organization's network of 2,500 social entrepreneurs to provide philanthropic guidance to foundations and companies.

Cheryl spent 15 years reporting on social entrepreneurship and business for publications including Fast Company, The New York Times and CIO magazine. Before her work with non-profits began, she was part of an incubation and start-up team to launch an online environmental magazine, for which she helped secure $12 million in venture funding. Dahle also founded and led Fast Company magazine's Social Capitalist awards, a competition to surface top social entrepreneurs. As the project manager for four years, she helped design an evaluation methodology and sifted through hundreds of non-profit applications each year to find top performers with compelling models for change.

As a consultant, Cheryl has served leading organizations in the space of hybrid business/social solutions, including Humanity United, Nike, the Robert Wood Johnson Foundation, the David and Lucile Packard Foundation, and the Center for the Advancement of Social Entrepreneurship at Duke University.

Brett Galimidi, environmental management advisor.

Brett is an experienced senior advisor and consultant who has developed tools for the measurement and management of environmental and social impact for social enterprises, foundations, non-profits and companies. Formerly a partner at Social Venture Technology Group, where he still advises, Brett has 13 years of applied quantitative and qualitative analytic skills for measuring new programs with few precedents. In 2009, Brett was named by Business Week as one of America's Most Promising Social Entrepreneurs.

His other accomplishments include developing ECOframe, a process for managing and evaluating sustainable tourism operations (a project of the UN Foundation, Rainforest Alliance and the United Nations Environment Programme) and developing a system for measuring the ecological, economic and social impact of carbon offsetting for premium trade on the voluntary carbon market, a program that benefitted more than 100,000 people in Central Mexico and was featured on BBC's "The World."

Brett also co-authored "Social Return on Investment: A Guide to SROI Analysis."

David Sawyer, President, Context.

Context is a consulting firm with practice areas in strategy, leadership, and culture. Active across sectors, David has played key roles in a variety of fields: sustainable agriculture, education reform, national service, social entrepreneurship, venture philanthropy, and the emerging green economy.

For a decade David directed leadership and service-learning programs at Berea College, receiving the nation's highest award for voluntary service from the White House and The Servant Leader Award from the National Youth Leadership Council. David was an advisor to Honda's innovative Eagle Rock School, designed Save the Children's Appalachian Teen Leadership Program, and traveled to India to meet with the Dalai Lama to help design a Tibetan refugee education program. Sawyer worked with the Clinton administration to help launch the nation's Americorps program, facilitated The New Generation Training Program and other national leadership programs, and in 1997 led a delegation to the Presidents' Summit for America's Future.

David spent four years working with energy company BP, coaching senior leaders, designing the cultural integration of the BP/ARCO merger, and facilitating a conference on global climate change in Washington. He helped develop the Denali Initiative, a national fellowship program for social entrepreneurs, and served as executive-in-residence for the Kauffman Foundation, promoting citizen engagement and civic innovation. David served as the first Executive Director of Social Venture Partners Portland and is Chief Culture Officer for gDiapers, the green business making the world's first flushable/compostable diaper. He is a Senior Network Practitioner with the Monitor Institute and is based in Portland, Oregon.

For more information on the Future of Fish, go to www.futureoffish.org or email project leader Cheryl Dahle at cheryl@spikeanddraft.com.