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A review of SeaBOS structure, impacts and possibilities

Key findings and summary of recommendations

SeaBOS is a global experiment, in which (presently) eight of the largest seafood production companies in the world are working with leading ocean scientists to drive transformative change “towards sustainable seafood production and a healthy ocean”. SeaBOS is the only forum where science and corporations, aquaculture and wild capture fisheries, and corporate actors from all three major markets (the Americas, Europe and East Asia) meet and collaborate at the CEO and executive levels. The ambition is to inform and drive change towards a future where seafood is transparently sourced, traceable, socially responsible, ecologically sustainable, and governed by ambitious public goals – a future increasingly demanded by regulators, funders, owners, investors, consumers, and civil society organizations. SeaBOS companies possess both the capacity and the responsibility to lead this critical transformation towards a healthy and thriving ocean - a foundation for the future of humanity.

In this context, an internal review conducted in 2024 assessed whether SeaBOS’ structure and performance continues to align with its mission, documenting the initiative’s progress and identifying its limitations. This document serves as a public summary of that review and the resulting actions agreed upon by its member CEOs.

SeaBOS has achieved recognition within the seafood sector, but has grown increasingly complex, which requires better-defined roles, mandates, and responsibilities. Key issues identified during the review process include a need for more explicit commitment of resources, better defined roles and responsibilities, improved compliance mechanisms when members do not reach agreed-to goals, better coordination, more tangible progress and more ambitious reporting.

During the yearly Keystone Dialogue in October 2024, CEOs committed to key measures to address these challenges and enhance SeaBOS’ impact:

1. Defining clear roles and responsibilities to ensure accountability

CEOs pledged to define clear roles and responsibilities for themselves, their executives, and SeaBOS’ operational units. This will set clear expectations, empower colleagues, and ensure accountability among CEOs.

2. Strengthening strategic and operational CEO engagement in Keystone Projects

CEOs agreed to take a more active role in strategic leadership of Keystone Projects. They also agreed to apply their expertise in project management and execution to accelerate implementation and impact.

3. Prioritizing between strategies and action

Task Forces are important mechanisms to develop joint strategies, for individual companies to subsequently implement within their own operations and provide data for joint reporting. CEOs emphasized that joint action will primarily occur through Keystone Projects, designed to deliver results over a four-year timeline.

4. Elevating the role of the Secretariat

Recognizing the importance of coordination and project management, CEOs committed additional funding to strengthen the SeaBOS Secretariat’s capacity and better align its operations with SeaBOS’ ambitions.

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Background and history

In 2015, a group of scientists identified a small number of disproportionately large seafood companies, termed “keystone actors” in the ocean system. They hypothesized that: *“sustainable leadership by keystone actors could result in cascading effects throughout the entire seafood industry and enable a critical transition towards improved management of marine living resources and ecosystems.”*

In November 2016, leaders from eight keystone companies convened for the first “Keystone Dialogue”, in the presence of HRH Crown Princess Victoria of Sweden, an advocate for the UN Sustainable Development Goals. This Dialogue resulted in a shared vision and a joint statement expressing an ambition to drive transformative change, including through a set of 10 commitments, and culminating in the formation of “Seafood Business for Ocean Stewardship” (SeaBOS).

Since 2017, scientists have taken on two key responsibilities: to advise keystone actors on the latest relevant science for pursuing a vision of ocean stewardship (science *for* SeaBOS), and to monitor and publicly reflect on the initiative’s progress (science *of* SeaBOS). Core questions underpin this collaboration: Can sustainable leadership by keystone actors result in cascading effects throughout the seafood industry and trigger the necessary transition in the management of marine living resources? Could these changes support marine ecosystems and benefit people while offering financial, reputational, or other advantages?

Initially led by an interim Secretariat (2017-2019), SeaBOS was coordinated by scientists in collaboration with Nutreco/Skretting’s CEO, Knut Nesse. In 2018, Task Forces were created to operationalize the 10 commitments. A formal SeaBOS Secretariat was established in 2019, funded by member companies. The SeaBOS Association and the SeaBOS Fundraising Foundation were established to develop strategies, manage membership, and govern the Secretariat. Time bound goals were set in 2020, with notable progress registered in 2021.

SeaBOS entered a new phase of ambition, accountability and transparency with the release of its [Progress Report](#) in 2022, where companies reported on their progress towards time-bound goals. In 2023, SeaBOS launched two regional “Keystone Projects”: one in Southeast Asia addressing [Antimicrobial Resistance \(AMR\) in shrimp aquaculture](#) and one in West Africa tackling [IUU fishing and modern slavery risks within SeaBOS member companies’ own operations and across their supply chains](#).

SeaBOS envisions *to lead a global transformation towards sustainable seafood production and a healthy ocean*. Since inception, SeaBOS companies have improved sustainability policies, reporting, and resource allocation towards ocean stewardship. They have also engaged in policy advocacy for ocean stewardship, as highlighted in the 2023 [Impact Report](#), yet substantially more work is still needed to achieve this transformative vision.

Learning from the past to shape the future

Between 2016 and 2024, SeaBOS has fostered substantial collaborations between scientists, keystone actors, philanthropic organizations, civil society groups, policymakers, business associations, UN agencies, and more. This unique network has inspired stakeholders and driven progress towards shared goals and agreed-upon commitments. The resulting work has also yielded insights presented in [scientific publications](#).

As of 2024, SeaBOS has become firmly established as a distinctive entity with clear agency and an ambitious mission: to achieve *collaborative and trust-based, voluntary but socially enforced, pre-competitive, science-based, cascading effects throughout an entire industry*. Its collaborative model

– bringing together diverse stakeholders with varying priorities – is an inherently challenging one that sometimes results in tensions or misunderstandings. As SeaBOS deepens its engagement to achieve its vision, navigating these complexities will require ongoing adaptation, open dialogue and sustained commitment to fostering trust and shared purpose.

As SeaBOS continues to evolve, key questions for its future include:

- What has worked well and what has been less effective?
- How can roles and responsibilities be more clearly defined and fulfilled?
- How can SeaBOS add value and deliver results that align with its commitments?
- How can the group expand while maintaining momentum and trust?

What follows is an overview of how the review process addressed these questions.

What has worked well and what has been less effective?

Reflections on effectiveness – insights from a survey

A survey of executives and scientists was conducted to gather perceptions on the aims, ambitions, successes and challenges of SeaBOS. Key benefits identified included “an opportunity to learn from each other”, “the opportunity to jointly define problems and solutions”, and the potential “to drive impact”. While tangible progress was highlighted, concerns were raised that SeaBOS as a whole was not delivering sufficient impacts. Respondents expressed both patience and frustration, acknowledging progress in the right direction, but at a slower pace than desired.

Respondents flagged their involvement in various stewardship-focused programs, highlighting that SeaBOS was perceived as adding value and gaining momentum. The collaboration was described as growing deeper, with communication - both internal and external - viewed as effective. External reports were considered important and valuable. However, there was notable concern about the lack of concrete action and delivery on established goals. Some respondents pointed to uneven investment of resources among member companies, the loss of key competence within certain companies, and coordination challenges, all requiring additional resourcing. A common sentiment was that insufficient time was being dedicated to SeaBOS activities. Respondents suggested that a stronger focus on “real execution”, “a more impactful Secretariat”, “dedicated staff, empowered by their CEO”, and “an additional CEO gathering (virtual) every year” could help address some of these challenges.

Despite the challenges, respondents expressed enthusiasm and motivation about opportunities to advance ocean stewardship, viewing it as an opportunity for both professional and personal development. The annual working meetings (taking place in spring, and attended by company executive staff and scientists, but generally no CEOs) were highlighted as one of the most productive and relevant aspects of SeaBOS. These were followed by the annual CEO Keystone Dialogues and the two Keystone Projects.

Reflections from CEOs

A short questionnaire was sent out to all SeaBOS member CEOs, asking about their expectations, perceptions of key outcomes, perceived barriers to achieving positive results, and visions for the future. The feedback highlighted the value of collaboration, while also pointing to key barriers, and offering suggestions for strategic priorities moving forward.

The SeaBOS model and vision: unique and valuable

CEOs expressed appreciation for the SeaBOS model, emphasizing its ability to align vision and ambition amongst member companies based on science. They emphasized that SeaBOS had

established a solid foundation for driving positive change, with several CEOs underscoring the value of the unique network that it has created and the benefits of working together with peers in the seafood sector, many of whom would not normally interact. CEOs were positive about the Keystone Projects model, which allows for focused efforts on specific issues of industry-wide importance.

Gaps in impact

Despite the strong foundation, all CEOs acknowledged that implementation has been lacking or limited, with insufficient action undermining impact. One CEO summarized the challenge:

"The organization is not set up to execute, implement, act, and therefore impact is lacking. Accountabilities and decision rights are loose and vague, therefore execution is hard to drive."

Another CEO highlighted the challenges of coordination and execution within SeaBOS:

*"Execution and the level of collaboration on implementation has been lower than expected."
"[SeaBOS] cannot and should not be reliant on members' resources to do project management work... [t]he Secretariat should play a greater role in project management and co-ordination and be resourced properly to ensure its success."*

Suggested ways forward

CEOs proposed several strategies to strengthen SeaBOS' impact, noting that *"Impact tracking could have been stronger"* and that *"Keystone Projects must have a clear decision-right structure to enable action and accountability for results."* There was broad agreement on the need for more authority to drive effective change. Suggestions included the need for greater engagement with policymakers, increased consumer involvement, collaboration with suppliers, and attracting new members. Both internal and external stakeholders were identified as requiring more active engagement.

Ideas for future Keystone Projects were also proposed, reflecting themes and work areas that CEOs think merit increased focus.

Internal review team reflections

The internal review team acknowledged that the diverse, ongoing, and evolving collaborations within SeaBOS are unique, exciting, and promising. However, the team also recognized that SeaBOS' ambitious vision, coupled with the complexities of integrating diverse cultures and expectations, presents challenges. Maintaining a bold vision and ensuring strong leadership were highlighted as key to overcoming these challenges.

There was broad appreciation for the increasing leadership shown by the two CEOs leading the SeaBOS Association at the time of the review, with new CEOs seen as adding substantial energy to the initiative. Collaboration between executives and scientists was recognized as a key strength, fostering productive relationships capable of addressing tensions and delivering results.

Persistent challenges identified include reaching consensus on the level of ambition for shared goals, defining clear reporting standards and agreeing to transparency levels that are acceptable and practical for all participants.

Another challenge is determining how to react (internally and publicly) when SeaBOS members do not deliver on agreed goals - be that by individual members, or as a group. The example used was with endangered species, where progress has been limited for companies beyond identification of the issues and best practice guidelines, which has been mainly driven by science inputs.

Key issues voiced by CEOs, executives and scientists alike included the need for greater clarity around roles, responsibilities, goals, and reporting. Everyone acknowledged that all members had not fully delivered on their commitments over time, for various reasons. Stronger accountability mechanisms and a clearer division of workload between the Secretariat, scientists, and company executives were seen as critical areas for improvement.

While individual member companies have made substantial progress and the organization is recognized for its strong social trust, the 2024 review highlighted that collective efforts must become more impactful. SeaBOS members universally valued SeaBOS' role, but aligned with the survey results indicating the need for more tangible, real-world impacts. To meet these expectations, SeaBOS must evolve into a more professional, goal-oriented and operational entity capable of delivering concrete and measurable results.

The review underscored significant enthusiasm about the potential of the Keystone Projects as a vehicle for change. While the Task Forces have been instrumental in initiating work and fostering learning, the review team recommended transitioning from the current Task Force structure to a more flexible and focused approach going forward. Task Forces could be revised or phased out over time, making way for impactful projects with clearly defined expectations and deliverables.

Bottom line

SeaBOS has made key strides since its inception, but the organization has yet to fully realize its potential, despite the dedicated efforts of its participants.

What has worked well? The vision is compelling, its ambitions are high, it has successfully established unique networks, and there is an exceptional level of social trust and optimism that meaningful change is possible and achievable through collective action.

What has worked less well? There is frustration over the gap between time invested and tangible impacts achieved. Resource commitments have been unclear, roles and responsibilities remain vague, and coordination challenges persist. Difficulties in delivering on joint goals and the need for more ambitious and transparent reporting on both progress and setbacks have also been highlighted as areas requiring attention and improvement.

How can roles and responsibilities be more clearly defined and fulfilled?

The review process identified the need for clearer definitions of roles, responsibilities and expectations across all organizational units and individuals involved in SeaBOS. The following is a summary of the current roles, functions and expectations within the initiative. A more detailed overview of SeaBOS roles and responsibilities can be found [here](#).

SeaBOS Fundraising Foundation – Consists of an expertise-based board, currently including the Chair and Vice-Chair of the SeaBOS Association, the leadership of the SeaBOS science team, and an external director from the University of Tokyo. This board holds financial and strategic responsibility for the initiative, employs the Secretariat, stewards resources, and facilitates strategic exchange among Secretariat, science team leadership, and CEOs.

SeaBOS Association – Comprised of SeaBOS company member CEOs, Presidents, or COOs. Cultivates a shared culture of expectations across members and provides encouragement, support and continuity across the membership.

Companies (Keystone Actors) – Includes the eight current SeaBOS members (Keystone Founders), with responsibility to implement the SeaBOS vision and mission within the seafood sector. Leads industry change by setting standards and becoming role models for sustainable practices.

Science team – Includes scientists at the Stockholm Resilience Centre, the Royal Swedish Academy of Sciences, the Stanford Centre for Ocean Solutions, Lancaster University, the University of Tokyo and other partner institutions. Develops and communicates the science of and for SeaBOS and the science of ocean stewardship. Co-develops science programs with CEOs, Task Force members, and Keystone Project leaders.

Task Forces – Develop and implement programs of work in line with SeaBOS commitments and agreed-upon [time-bound goals](#).

Keystone Projects – Deliver transformational, on-the-ground impact on specified priorities, serving as the primary vehicles for achieving SeaBOS' objectives.

Secretariat – Comprised of a Managing Director, a Director of Strategy and Partnerships, and an Executive Assistant. Supports members in achieving their goals by facilitating communication, documentation, administration, and logistics. Manages and nurtures relationships within the initiative, and with key external partners. Provides support to the various groups across SeaBOS to ensure smooth operations and goal alignment.

Individuals in SeaBOS and main roles and responsibilities

Company Roles

- **CEOs** – integrate ocean stewardship into company operations, and actively promote its integration across subsidiaries and supply chains. Motivate, inspire, and communicate SeaBOS goals and vision. Allocate internal human and financial resources to achieve these goals and SeaBOS' vision.
 - a. **Director of SeaBOS Fundraising Foundation** – co-directs strategy and supports the SeaBOS Secretariat. Budgetary responsibilities.
 - b. **Chair of SeaBOS Association** – encourages and ensures all CEOs commit adequate resources to achieve SeaBOS' goals and objectives.
 - c. **Vice-Chair of Association** – supports the Chair in motivating members and ensuring timely execution of actions.
 - d. **New Member Selection Committee of Association** – supports membership governance, and reviews applications for new members to the Association.

- e. **CEO Sponsor for Keystone Projects** – supports the lead executive and participating companies (and secretariat if appropriate) to ensure delivery on the milestones, outcomes, and communications as agreed for the keystone project. Accountable to the SeaBOS Association.
- **Executives** – co-design and implement SeaBOS activities through active engagement in Task Forces and Keystone Projects. Ensure internal support and awareness of SeaBOS work. Participate in annual working meetings with the science team.
 - a. **Task Force lead(s)** – facilitates ambitious progress towards co-designed priorities and joint goals and supports science and company joint activities. Leverages resources from members and external partners to achieve agreed-to outcomes. Presents recommended direction and approach for the Task Force to CEOs at the annual Keystone Dialogue.
 - b. **Keystone Project lead** – coordinates and leverages resources of members and external partners to achieve Keystone Project objectives.

Science Roles

- **Science team members** – contribute to the scientific program of work and collaborate with executives to co-design activities and determine objectives.
 - a. **Science lead** – ensures the scientific foundations of initiative and monitors the Keystone Dialogues experiment. Secures funding to undertake the science needed and provides motivation for the network of scientific collaborators.
 - b. **Director of SeaBOS Fundraising Foundation** – co-directs strategy and supports activities of the SeaBOS Secretariat. Budgetary responsibilities.
 - c. **Coordinator** – facilitates meetings, communication and the smooth flow of information within the science team.
 - d. **Focal point: Task Force** – ensures the scientific foundations of the Task Force. Co-develops strategic goals and supports the science program. Leverages networks of scientific expertise to support implementation.
 - e. **Focal point: Keystone Project** – ensures the scientific foundations of the Keystone Project. Engages networks of scientific expertise.

Secretariat Roles

- **Managing Director** – facilitates achievement of collective goals and delivery of Keystone Projects outcomes. Ensures smooth operations of the Secretariat. Provides information to the Board and facilitates communication within the initiative. Ensures sustainable and responsible membership growth.
- **Director of Strategy and Partnerships** – connects SeaBOS to relevant international platforms and initiatives, leveraging these relationships for broader impact. Drives the monitoring and reporting program for members and external stakeholders. Engages with Keystone Project and Task Force leaders to provide strategic assistance.
- **Executive assistant** – enables the administrative functioning of the Secretariat and supports the organization and facilitation of meetings.

Bottom line

SeaBOS has evolved into a complex organization that now requires better-defined roles, mandates and responsibilities to fulfill its commitments effectively. A clear understanding of institutional components is essential to delivering tangible outcomes in line with SeaBOS commitments and advancing its shared vision. Achieving this will necessitate formalization through robust internal accountability mechanisms and strengthened capacity within the Secretariat.

How can SeaBOS add value and deliver results that align with its commitments?

SeaBOS has made notable progress over the years, thanks to the dedication of key individuals from member companies and the science team. Some of these contributors remain actively engaged, while others have moved on or retired. Achieving the ambitious goals set by SeaBOS is challenging, requiring sustained effort, determination and resilience. The intensity of this effort underscores that SeaBOS' ambitions are both appropriate and necessary. Meaningful change is inherently difficult, and progress depends on people who are committed, motivated, inspired and able to see tangible benefits (social, financial, or professional) from their contributions.

At its core, SeaBOS operates as a "social construct" with a unique culture, shared language, rituals, formal and informal rules, and external expectations. SeaBOS has successfully developed a robust "brand" largely characterized by the scale of its participating companies, the credibility of its scientific partners, the diversity of its geographical and cultural scope, and its bold vision for transformative change. Ultimately, trust is the foundation of SeaBOS – trust among member companies, trust in scientists to responsibly handle sensitive information, and trust that collective action can lead to meaningful change.

Value added to date

SeaBOS has primarily added value by inspiring a vision of what is possible. Bold commitments, ambitious goals, public reporting towards those goals, and public policy statements aimed at greater transparency and accountability within the seafood industry have enhanced SeaBOS' reputation as a "promising" actor with expectations to deliver results.

Despite these achievements, challenges remain. Achieving the ambitious goal of "cascading industry change" is a complex and ongoing process, and progress towards time-bound goals, such as those related endangered species or labor abuse, has proven difficult, highlighting the need for continued focus and collective action. The departure of two members (*Mowi* and *Kyokuyo*), underscores the need to continually demonstrate value and outcomes that align with the expectations of all stakeholders, while also ensuring member CEOs remain engaged and committed to their shared responsibility for ocean stewardship.

Currently, SeaBOS risks being perceived as falling short of its mission. Despite this, a strong commitment to collaboration persists. Regular, well-attended meetings and growing trust have facilitated meaningful dialogue across actors, scientific disciplines, and geographies that typically operate in silos. There is an increasing willingness to be transparent, as reflected in the publication of the five-year Progress Report, the Impact Report, and sector-leading GHG emissions reduction efforts and disclosures. Furthermore, SeaBOS' mandate and priorities are also driving deeper engagement within member companies, reaching beyond sustainability officers to procurement teams and other departments.

The individuals engaged in SeaBOS share a deep conviction that an exclusively individualistic, short term, efficiency-based model of operation is incapable of addressing the ocean and seafood sector needs. SeaBOS has the potential to demonstrate that collaboration can unlock untapped potential and benefit people, ecosystems, corporations, and science. However, realizing this vision in the face of today's corporate and political complexities will require unwavering determination and resilience.

Bottom line

To date, SeaBOS has delivered few tangible outcomes and actions related to the ten commitments. More accountability mechanisms and greater focus on key priority areas are needed to address this shortfall. Yet, change requires hard work and patience, and there is a willingness among those involved to continue.

How can the group expand without losing momentum and trust?

In 2024, SeaBOS engaged in multiple conversations with prospective new members, guided by a set of agreed-upon selection criteria. These discussions revealed a sense of caution among potential members because of the limited results achieved to date. Prospective members have expressed hesitation about whether their involvement would be worthwhile and whether clear benefits would be realized.

SeaBOS' internal discussions have often weighed the pros and cons of expanding membership. To date, the consensus has been that delivering tangible results is essential before inviting new members, to maintain trust and internal dynamics. However, the recognition that broader connections in the seafood sector are necessary to achieve meaningful impacts and outcomes prompted a change in the SeaBOS Association statutes in early 2024. This change allows new members to join as 'Associates', a newly created membership category alongside 'Keystone Actors', and recognized Keystone Founders of the initiative.

Ongoing conversations with potential Associates and Keystone Actor applicants suggest that adding new, ambitious members to SeaBOS could bring critical resources, including financial contributions, new capacities and skills, fresh energy and renewed motivation. These contributions could amplify SeaBOS' impact and accelerate progress on its commitments. However, for this expansion to be successful, those potential new members must first align with the vision and direction of SeaBOS and be prepared to drive change as ocean stewards. At the same time, SeaBOS must first clearly articulate its goals and purpose to any new members and demonstrate the ability to deliver on commitments and transparently report on both achievements and shortfalls.

Bottom line

New members have the potential to contribute vital resources, energy, and ambition to the initiative, enabling faster progress on key commitments. Success of this expansion hinges on clarifying SeaBOS' future direction, delivering tangible results and ensuring alignment with its mission.

This summary was drafted by the SeaBOS Review Team and approved by SeaBOS Members in December 2024. For any questions about the review process, contact [Dr. Henrik Österblom](#).

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GLOBAL ECONOMIC DYNAMICS
AND THE BIOSPHERE
THE ROYAL SWEDISH ACADEMY OF SCIENCES



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