

The Role of Market Stakeholders in Integrating EM Into Supply Chains

This paper is part of a series that summarizes discussions from the 2022 Global Electronic Monitoring Symposium,¹ which convened more than 50 EM experts, both in person and virtually, for a three-day workshop. The symposium focused both on the use of electronic monitoring programs to increase oversight and transparency in international fisheries management and on existing barriers to the uptake of EM. Although this series of papers does not represent an exhaustive discussion of the issues, it includes the key points that symposium participants raised.

Introduction

Global Electronic Monitoring Symposium (GEMS) participants reflected on the momentum growing for electronic monitoring (EM) in supply chains and highlighted recent actions taken by various stakeholders. These market actions range from coalition support for EM adoption to individual company commitments to integrate EM and/or 100% observer coverage within their supply chains.

Examples of stakeholder leadership on EM

1. Retail coalitions

Market partners such as retailers and tuna supply chain companies have begun working collaboratively to identify and make commitments on issues surrounding illegal, unreported and unregulated fishing, transparency, and environmental and social responsibility. The Global Tuna Alliance (GTA) is a key example: Members have agreed to review their sourcing requirements for tuna and adopt aspirational timelines through a five-year strategy called the 2025 Pledge Towards Sustainable Tuna. As part of the strategy, GTA participates at regional fisheries management organizations (RFMOs) on behalf of their members to advance the adoption and implementation of 100% observer coverage (human and/or electronic). Similarly, the World Wildlife Fund (WWF) initiated its WWF Basket Blueprint for Action, supported by the UK's top retailers, to progress towards 100% observer coverage, including electronic monitoring, by 2025.

2. Fishing sector

¹ GEMS Steering Committee members are Andrew Clayton, Claire van der Geest, Esther Wozniak, Eugene Pangelinan, Gerald Leape, Mark Zimring, Papa Kebe, Robert Gillett and Ruth Hoban.

Fishing companies have also taken initiatives to improve their supply chains. Thai Union, one of the world's largest tuna suppliers, has committed to 100% on-the-water monitoring by 2025, including financial investments for EM implementation. Luen Thai Fishing Venture Limited has also implemented EM systems to monitor its distant-water fishing activities. The project expanded to include vessels based in Federated States of Micronesia as part of the Nature Conservancy-Pacific Islands Cooperative Longline EM Project to compare EM to human observer data and suggest improvements of EM utility.

3. Seafood sustainability labels

The Marine Stewardship Council's (MSC) sustainable fishery certification is a widely recognized standard. In response to pressure from non-governmental organizations (NGOs) and sustainability-minded companies, the MSC has updated its evidence requirement framework. The new standards will require fisheries to independently monitor 30% of catches to ensure accurate information on how the fishery interacts with other species and habitats. This can prompt more companies to consider implementing EM to validate sustainability claims for premium market access.

4. Non-governmental organizations

As part of its many EM initiatives, the Nature Conservancy recently facilitated an EM bulk procurement process with over 250 fishing vessels to scale up industry-led EM programs. The bulk procurement program coordinated a bidding process to improve demand visibility and give providers sufficient scale and certainty to reduce the costs of program delivery and invest in improved functionality. The Pew Charitable Trusts is another NGO in this field, providing resources to help RFMOs and interested stakeholders create effective EM programs that will improve oversight of international fisheries while increasing transparency and accountability. These resources include toolkits, cost and benefit analysis, and funding EM-related trials.

Next steps

GEMS participants broadly agreed that EM is beyond proof of concept and that the entire supply chain—from ship to shelf—can benefit from this technology. Realizing this, various stakeholders, including seafood processors, buyers and retailers, are working to advance EM adoption. However, momentum is needed to move from aspirational commitments to more direct action, including:

- Moving from retail coalition statements to time-bound workplans that fully integrate EM into supply chains.

- Working with all EM stakeholders to align public and private incentives to improve EM functionality and reduce or share costs.
- Advocating for EM program development at regional fisheries management organizations.
- Providing educational workshops on EM development processes and policies, including those agreed to by RFMOs.