Making Retail Supply Chains Sustainable
Upgrading opportunities for developing country suppliers under voluntary quality standards

Jeroen van Wijk
Rotterdam School of Management - Erasmus University

Myrtille Danse
Landbouw Economisch Instituut

Rob van Tulder
Rotterdam School of Management - Erasmus University

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Summary

In a response to increased consumer interest in sustainability issues, supermarkets have been adopting voluntary standards to improve the quality of their products in respect of food safety, and environmental and social sustainability. This report addresses the question as to what extent these quality standards indeed enhance the sustainability of retail supply chains. The term 'sustainability' is defined in a specific way, and refers to the business upgrading opportunities that the retail supply chains offer to developing country suppliers. The paper hence looks first into the appropriate method for measuring the effects of retail quality standards on upgrading and by these suppliers, and then analyses the effects of the standards on upgrading opportunities.

The first part of the report reviews the literature on global value chains (GVCs). The GVC approach resembles supply chain analysis but is better equipped to analyze sustainability issues. The GVC approach provides analytical tools to examine (a) relationships with non-market parties, (b) interdependence among all firms within the chain, (c) the influence of governmental trade regulation on the room for manoeuvre in the chain, and (d) normative issues related to production processes and the distribution of chain gains. Specific attention is being paid to the manner in which primary supplies can improve their position in the chain. Four forms of supplier upgrading can be distinguished:

1. *Process upgrading* More efficient transformation of inputs into outputs by reorganizing the production process or introducing innovations
2. *Product upgrading* Moving into more sophisticated product lines (increased unit values)
3. *Functional upgrading* Acquiring new functions in the chain (such as design, marketing, branding) to increase overall skill content of activities.
4. *Inter-chain upgrading* Using the knowledge acquired in particular chain functions to move horizontally into different sectors.

The second part reports of an explorative analysis on the *perceived effects* of 36 quality standards in the retail on upgrading by developing country suppliers. Seven indicators were used to examine the contribution of the quality standards to upgrading: additional income, organizational skills development; technical capacity building; resilience to external shocks; reduction of power asymmetry; identification of primary suppliers with end consumers; and access to alternative value chains. Data on these indicators was collected through a survey of a wide variety of relevant media: websites, scientific articles and reports, policy reports, and online newspaper articles.

The overall conclusion is that the majority of the 36 standards are perceived to facilitate trading opportunities for developing country producers, in that they serve as entry ticket to the international markets. However, to those suppliers who fail meeting the standard's criteria, quality standards impose impregnable trade barriers. The study found interesting differences in effects between the various categories of standards. First, standards initiated by NGOs and partnerships are perceived to offer better upgrading opportunities to suppliers than do standards initiated by (inter-) governmental authorities, by individual firms, or by business associations. Second, social and social/environmental standards have a more positive influence on process and product upgrading in developing countries compared to voluntary food safety standards. Third, product-specific standards offer better upgrading opportunities than do generic quality standards.

Introduction

Over the past decade, retail firms have witnessed a growing public interest in corporate social responsibility (CSR). Consumers and civil society organizations have become well aware of product safety aspects and of a wide range of other quality attributes of the products they buy, and increasingly require companies to operate in a more responsible and sustainable manner. The wish to achieve sustainability in its supply chains was the reason for Super de Boer to embark on the "economy light" project that involves a bond with Oxfam Novib and the Dutch Foundation for Nature and Environment to agree together on sustainability criteria for suppliers of a range of fresh products. RSM-Erasmus University is involved to facilitate the development of a business model for sustainable retail supply management.

A priority issue for the Economy Light Laurus group is the role quality standards play in the sustainability of supply chains. Increased consumer awareness in issues on safety, environmental degradation, and working conditions has triggered the emergence of a wide range of new quality standards. Private companies have been adopting these standards *voluntarily,* even though the conditions for compliance to these standards go beyond the requirements of extant mandatory quality standards, and despite the fact that many of these standards were developed by non-business actors. The retail industry is no exception; it collectively developed the Eurepgap standard, while individual retail firms have implemented additional environmental and social standards. What remains unclear, however, is to what extent and on what grounds these quality standards can be characterized as contributing to sustainable supply chains.

Research on this issue is highly relevant for a number of reasons. First, corporate social responsibility is often mistrusted, because the CSR paradigm takes fundamental business values as a given. The need for a 'business case', i.e. the prospect of return on investment, drastically restricts the room for maneuver as it comes to social and environmental justice (Blowfield 2005; Blowfield and Frynas 2005). Second, because the markets for sustainable products are expanding, concern has been expressed about the sincerity of CSR strategies. Firms would be interested in new markets rather than ethics and therefore aim at "hijacking the fair-trade wagon" (Purvis 2006). Finally, questions have been raised about the preferred way to sustainability in supply lines. The plethora of overlapping quality standards put both private firms and NGOs often in a dilemma when they have to make choices between similar sustainability standards.

These considerations led to the present study that reports on a comparison of sustainability quality standards relevant to the Dutch retail sector. In line with the CREM (2006) report on "social criterions for Laurus' product assortment" the focus is on sustainability impact of standards on Super de Boer's developing country suppliers, particularly in tropical fruits, vegetables, fish, sugar, coffee and tea.

We have chosen to define the term 'sustainability' in a specific way. Rather than addressing issues such as environmental degradation, exposure to chemicals, child labour, or fair prices as such, the emphasis in this report is on business opportunities that the retail supply chains offer to developing country suppliers. The emphasis on upgrading follows from our global value chain approach. The chain perspective is key to food retail in which firm networks ensure safety and sustainability of produce by keeping their supply lines transparent and by implementing mechanisms such as tracking and tracing. The impact of international standards applied by supermarkets to their supply chains, may therefore reach as far as the producers from developing countries (Barrientos, Dolam and Tallontire, 2003). The performance of individual firms also increasingly depends on channel performance, although inequality in the access to resources renders the effects of chain performance for individual chain actors highly diverse. The focus on upgrading means that the report specifically addresses the effects of quality standards on possibilities for suppliers of tropical food crops to improve their position in the global value chain.

The paper has three leading research questions:
1. Which method is appropriate to measure the effects of retail quality standards on upgrading and value-added opportunities by developing country suppliers?
2. What are the effects of these quality standards on upgrading by suppliers in developing countries?
3. Can differences in such effects be detected between different categories of retail quality standards?

The organization of the report is as follows. The first section explains the main concepts of the global value chain, which serves as context for the discussion on quality standards in the next section. Then we review the literature on upgrading opportunities in global value chains. The fourth section is devoted to methodology and the presentation of the exploratory research of 36 quality standards in the retail. The report finishes off with a conclusion and discussion.

1. Global value chain analysis

Supply chain literature defines the supply chain as ‘the alignment of firms that bring products or services to market’ (Stock and Lambert 2001), or ‘all interactions between suppliers, manufacturers, distributors, and customers’ (Heizer and Render 2001). Since these interactions add value to the product, the supply chain is often referred to as the ‘value chain’ or ‘demand chain’ in strategic management literature. Michael Porter (1985) for instance, speaks of ‘value chain system’ when he refers to a firm’s relationships with upstream suppliers and downstream customers. This system differs from the value chain as such, which encompasses the range of internal value-added processes within one company. Porter’s value chain approach is primarily used to analyse the core competences of the firm to achieve cost reduction and differentiation.

The limitation of the strategic supply chain literature is that it is less equipped for analysis of sustainability issues. The inclusion of social and environmental sustainability objectives in the corporate strategy requires analytical tools to examine (a) relationships with non-market parties, (b) interdependence among all firms within the chain, (c) the influence of governmental trade regulation on the room for manoeuvre in the chain, and (d) normative issues related to production processes and the distribution of chain gains. The theoretical approach which is more apt for studying sustainability in supply chains is Global Value Chain (GVC) analysis.

GVC analysis shares with strategic supply chain theory its systemic approach; the focal point is a network of companies rather than an individual company. It also uses the chain as metaphor for studying the relationships between the aligned firms. However, GVC analysis is derived from a different scientific paradigm known as the world-systems theory which was developed particularly by Wallerstein (1979). Like the latter, GVC analysis focuses on the structure of the world economy, but its level of analysis is the transnational networks of companies rather than countries (Gereffi and Korzeniwicz, 1994).[1] The GVC approach offers an analytical model to understand the nature of ties between small, local firms and multinational corporations that are linked together in global markets. It also allows the inclusion of non-market actors, such as governments, and civil society organizations that have other than purely economic interests. The GVC facilitates analysis of the underlying global organization of an industry including the power relations within chains as well as the allocation of economic surplus (Clancy 1998: 125). It also enables the broadening of the reference point for corporate performance from shareholder to stakeholder value.

1.1 Global value chain analysis: the main concepts

GVC research takes place along four dimensions (Gereffi 1994): (a) an input-output structure that identifies the sequential steps in the production process, (b) the spatial dimension, involving the location where different stages of the process take place, (c) the organizational or governance dimension, which involves the structural characteristics of the value chain based on ownership and market power relations, (d) the institutional, contextual dimension.

Central in GVC analysis is the organizational or governance dimension, which refers to forms of internal chain governance, and which is closely linked to the (inter) dependencies between chain actors. In most global value chains a 'lead' or 'core' company can be identified on the basis of its market power and value-added generation. The lead company is capable of setting the standards of production for the entire chain. Initially, two types of global value chains were distinguished: (a) producer-driven chains and (b) buyer-driven chains (Gereffi 1994). In *producer-driven chains* the lead company is the manufacturer or a large, integrated industrial enterprise that controls the production system through its network of suppliers, subsidiaries and sub-contractors. Producer-driven chains are typical for capital and technology-intensive industries like automobiles,

[1] GVC analysis was developed under the name of 'global commodity chain', but the term 'commodity chain' has been replaced by "value chain' in the recent literature in order to enable coverage of those products that lack commodity characteristics (Gibbon and Ponte 2005: 77).

aerospace, and electrical machinery. In *buyer-driven chains* the lead company is the retailer or branded company that derives its position from its consumer market knowledge, while they outsource most, if not all of their production. These chains are usually found in labour-intensive consumer good industries such as garments, consumer electronics, and food. Gibbon (2001) identified a third chain type, the *international trader-driven chain*, which can be found mainly in primary commodity markets. The core firms in this chain are the trading houses that trade in multiple commodities. Products from all over the world are obtained in order to be traded to other firms that process them into final consumer products.

Recently, a more comprehensive theoretical framework for the identification and explanation of governance patterns in global value chains has been proposed by Humphrey and Schmitz (2004) and Gereffi *et al* (2005). The framework draws on three approaches: transaction cost analysis, production networks, and technological capability and firm-level learning. The main thrust of the theory is (1) that chain governance is located on a continuum between a markets situation (little governance) and a hierarchy situation (high governance combined with a high degree of vertical integration), and (2) that three variables determine that location: the complexity of inter-firm transactions, the ability to codify these transactions, and the capabilities of suppliers to meet requirements of buyer. Using these variables, five basic types of value chains can be distinguished (see table 1).The ‘Captive’, and ‘Hierarchy’ value chains are demand-driven; the ‘Modular’ and ‘Relation’ chains resemble most of what used to be producer-driven chains. The ‘Markets’ chain type tends to be the least driven.

Exhibit 1 Typology of Global Value Chains

Global value chain type	**Governance features**
Market	Transactions easily codified, specifications relatively simple, and suppliers capable of producing the products. Little chain coordination required. Switching costs are low for both suppliers and buyers.
Modular	Suppliers make products to specifications of buyers. Modularity rises with increasing codification of specifications (through technical standards). Suppliers capable of internalizing tacit information. Coordination and switching cost remain low
Relational	Codification difficult, which makes interactions complex. Suppliers and buyers are mutually dependent because of complexity. Relational value chain governance is to be expected because a lot of tacit knowledge must be exchanged. Outsourcing is likely to benefit from capabilities of supplying firm. Mutual dependence regulated through reputation, social and spatial proximity, family and ethnic ties, etc.
Captive	Ability to codify and complexity product specification are high, but supplier capabilities low, then governance tends toward captive type. High degree of monitoring and control required of the lead company. Suppliers are dependent on buyers. The chain is ‘captive’ because switching costs for suppliers are high.
Hierarchy	Products are complex and specifications cannot be codified. Capable suppliers cannot be found, then core firms develop products in-house. Vertical integration. Dominant form of governance: managerial control, from managers to subordinates and from HQs to subsidiaries and affiliates.

Sources: Gereffi et al (2005), Humphrey and Schmitz (2004)

The capability of a core firm to govern, or control the chain largely determines the chain type. Gibbon and Ponte (2005) have stressed that core firms may be able to determine the functional division of labour along the chain without having actual control of other chain actors. They point to the historical trend away from hands-on, towards hands-off forms of coordination between core firms and their suppliers. The design of quality standards along the chain enables lead companies to retain power and control, even in highly fragmented chains. Quality management has become one of the key aspects of this chain governance (Fulponi 2007; Gibbon and Ponte 2005; Muradian and Pelupessy 2005). In fact, control over the qualification of specific products is a key source of power in global value chains, and this source is not related to the degree of ownership, but rather to the ability of managing the sales of the chain's product. Hands-on forms of coordination upstream remain required, but this function is passed on to the immediate (first-tier) suppliers who need to secure an optimally competitive portfolio of subcontractors. Hands-off coordination occurs through the codification and standardization of quality and performance criterions, and through the adoption of third-party certification and monitoring. The latter allows buyers / core firms to transfer the cost of quality control to suppliers.

1.2 Intra-chain competition

All chain actors, i.e. all those firms that add value at some point in the chain, have an interest in the sale of a final, competitive product. A high degree of cooperation between the companies aligned in the chain is therefore required, which makes chain governance acceptable to all actors. As a result, competition, on the one hand, tends to change from inter-firm to inter-chain competition. On the other hand, intra-chain competition remains relevant because chain firms intend to upgrade their position in the chain. If this requires them to target at chain functions that are taken care of by other chain firms, the latter are likely to contest this attack on their position.

One example is the attempt by Ethiopian coffee growers to obtain more of the value-added of the demand-driven global coffee chain in which Starbucks is the core firm. Starbucks is a Fair Trade brand that offers consumers a specific coffee 'experience', including a sophisticated drink combined with the assurance that primary coffee suppliers get a fair share of the chain's revenues. Starbucks' market power is based on a strong brand. The company has the know-how of blending various types of coffee imported from all over the world. Moreover, Starbucks is strong in communicating a sense of authenticity by using geographical names of coffee-producing regions. Ethiopia is one of them. However, Ethiopian coffee producers have begun to protect their regional names as trade names abroad in an effort to acquire some highly value-added marketing activities of the Starbucks' chain. So far, this strategy has failed in the USA where Starbucks has prevented its Ethiopian suppliers from legally protecting their regional names, reportedly denying them up to US$ 90 million a year of additional earnings (Seager 2006; The Economist 2006).

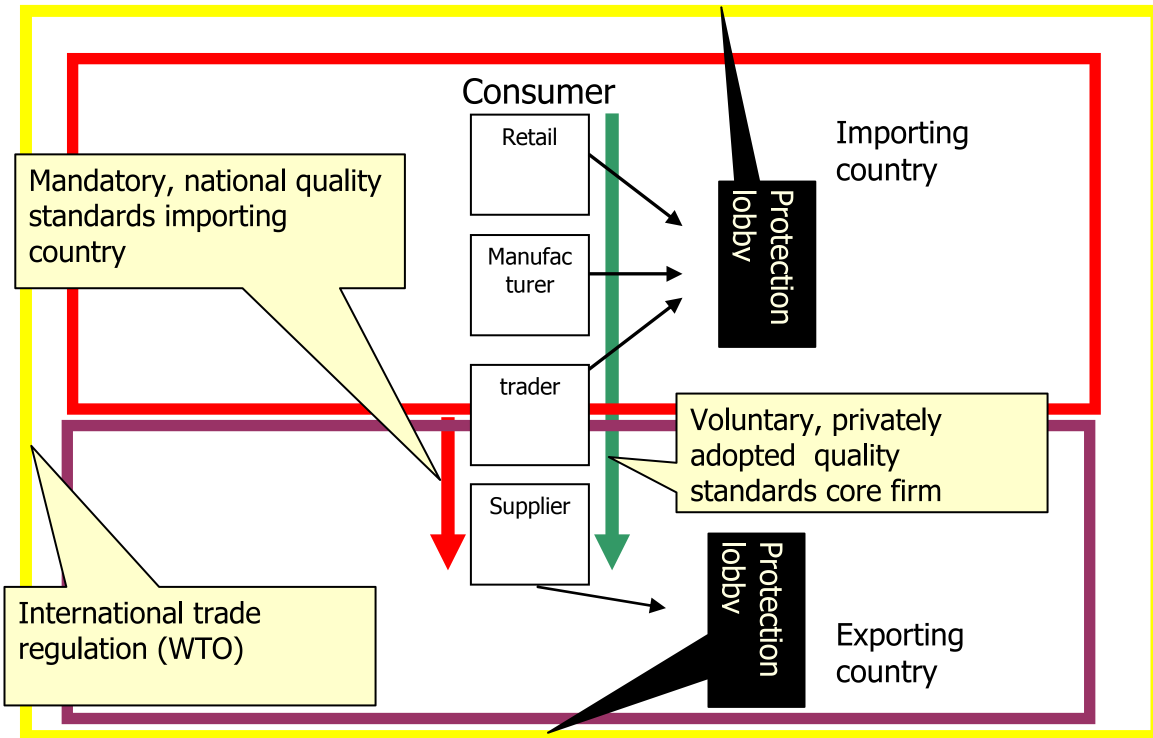
In market logic, intra-chain rivalry is part and parcel of the market economy, where competition is considered to be a healthy distribution mechanism. However, in a normative logic, rivalry in supplier and buyer relations is judged from a perspective of fairness. Two ethical theories that are relevant in this respect are known as distributive justice and procedural justice. *Distributive justice* concerns fairness in the division of benefits and burdens between partners, such as chain actors. *Procedural justice* is about the fairness of a party's strategy for dealing with its vulnerable partners. Academic literature has shown that procedural justice has stronger positive effects on relationships than distributive justice has (Kumar 1996: 100), and that procedural justice is of greater concern to suppliers than distributive justice, particularly in liberalized global commodity markets where prices are difficult to control (Fearne and Duffy 2004:17). Research among 140 suppliers of 10 major UK retailers revealed that suppliers give higher priority to procedural issues (communication, planning, decision-making, execution), than to prices and financial issues (Fearne and Duffy 2004: 17).

1.3 Internal and external chain governance

Both intra-chain cooperation and competition are highly influenced by the institutional environment of the global value chain. Two forms of institutions can be distinguished (see Figure 1). First, the institutions *internal* to the chain include the voluntary quality standards set by the core firms in the chain. The second form concern institutions *external* to the chain. They comprise of mandatory quality regulations and trade barriers set by governments of both the exporters' and importers' countries. Because core companies are being held liable and responsible for the qualities of the end product in the final market, they combine their private standards with the mandatory standards of the importing country. Together, these standards constitute the 'chain governance'. The mix of private and mandatory quality standards is promoted by the core company throughout the entire value chain, and, hence, also applies to suppliers abroad that fall under foreign jurisdictions.

The distinction between internal and external value chain institutions is somewhat misleading. Chain actors in the importing country lobby extensively with their national governments for mandatory regulation that is supportive to their business. For example, in the global cocoa value chain, chocolate processors in the main international markets have been quite successful in protecting their activities from African suppliers in the chain who intend to acquire more value added activities in processing. Tariff escalation ensures that suppliers face higher tariffs for importing semi-final and final cocoa products than for importing cocoa beans. Tariffs for importing chocolate into Europe amount to over 30 per cent (UNCTAD 2003). Another example is the introduction of the EU directive that allows the use of six other vegetable fats to partially substitute for cocoa butter to be used in chocolate production. Because of this directive, processors reduce their dependence on cocoa suppliers in their chains, at the expense of the market position of African suppliers (EFTA 2004). The mandatory institutional environment may thus be less 'external' than is usually assumed.

Figure 1 Institutional environment regulating global value chains



1.4 The global value chains in retail

The global value chain approach is very suitable for an analysis of the European retail business. In most European countries around 70 per cent of the market is served by only five supermarket chains (Vorley 2003). In the UK, the C4 ratio was as high as 75 per cent in 2004 (Fox and Vorley 2004). The companies that dominate this market are Tesco, Asda (Wal Mart), Sainsbury's and Morrisons. At the global level, the top 30 supermarket chains cover one-third of the food retail, and it is expected that at 2010 only ten companies will dominate the supermarket sector worldwide (Fox and Vorley 2004).

The tendency of rising retail power started in the mid 1980s and is the outcome of three developments (Kumar 1996):

(a) Emergence of retail mega formats, that include 'category killers' (Toys R U), 'warehouse clubs' (Wholesale Club), and 'Discount Supercenters' (Wal-Mart Supercenters).

(b) Mergers and acquisitions, in which previously independent department-store chains now belong to a retailing conglomerate (Metro and Ahold).

(c) Horizontal alliances, in which some European retailers have organized themselves into cross-border buying alliances to bargain more effectively with suppliers (Coop, Rewe).

In theoretical terms, the concentration in the supermarket sector has altered the governance structure of the retail value chains. In the first place, the chains transformed from a *Market* type towards a chain that is both *Relational* (retailers versus the major food processors) and *Captive* (retailers/food processors versus commodity producers). Supermarkets used to buy, for example, fresh fruits and vegetables from wholesalers, but the increased concentration and competition in food retail from 1980s onwards forced supermarkets to compete through product quality and diversification. The supermarkets started to coordinate the chain more explicitly by non-market means (Gereffi *et al* 2005). Secondly, the food chains have become ever more global due to the expansion of imported food items. In 1995, 6 per cent of Wal-Mart's total merchandise was imported, against 60 per cent in 2004. Companies like Wal-Mart have become gate keepers to the main global markets. They have the power of decision making: the decisions they make do not only affect the western economies, but also those who export to these markets. They vitally influence the fate of industry sectors.[2]

Developing country suppliers and exporters entirely depend on the access that they have to the global value chains. Their competitive advantages are limited, however. The liberalization policies of the past decade abolished most export marketing monopolies in developing countries. This development entailed two negative consequences for primary suppliers. They lost a guaranteed survival income and their bargaining power in the value chain was reduced. Rather than negotiating with state-owned monopolies with large volumes and resources to offer stock in advance or hold stock back from the world market, international traders now deal with a multitude of SME local private players with access to limited resources (Gibbon and Ponte 2005: 196-202; Muradian and Pelupessy 2005: 2032). According to Gibbon and Ponte (2005: 202) liberalization has left African farms and firms with only two options, including (a) the (passive) continuation of specialization in traditional varietal, and/or quality profiles to supply premium markets, such as organic food, or (b) the (active) specialization in more price competitive offerings (because of low labour costs) of commodities.

2. Private quality standards as chain governance

Retailers are highly visible core companies in captive and relational global chains. They are increasingly being held accountable for the qualities of the end product and the production processes wherever in the chain. To avoid the risk of reputation damage and extended liability, retail firms govern their supply chains intensively by means of a wide range of quality standards.

[2] "Is Wal-Mart good for America?" Interview with G, Gereffi. *Frontline*, November 16, 2004, www.pbs.org/wgbh/pages/frontline/shows/walmart/interviews/gereffi.html

Quality standards are agreed criteria. They are "external points of reference by which a product or a service's performance, its technical and physical characteristics, and/or process and conditions under which it has been produced or delivered, can be assessed" (Nadvi and Wältring 2004: 56). Quality standards enable governance of the value chain by controlling production through non-market mechanisms, because they are used to communicate the extent to which a product's qualities meet the specified criteria.

In line with the discussion above on internal and external governance, quality standards may be either public and mandatory, or private and voluntarily adopted. Mandatory standards are imposed by governments and intend to protect business or consumers within national jurisdictions from dishonest practices and risks. Governmental food quality standards have a long history and can be traced back to the heyday of the Assyrian and Egyptian empires. The first food laws that were implemented with monitoring systems and compliance control emerged in the 19th century. The Austro-Hungarian Empire developed a collection of food standards and product descriptions under the *Codex Alimentarius Austriacus*, while food trade associations began to develop private harmonized standards to facilitate international trade (Dankers 2003: 3).

The private, voluntary quality standards intend to enhance inter-firm compatibility and may improve competitiveness of individual firms. These standards use certified labels to communicate the quality characteristics of the products and management processes to customers. Private standards serve the function of reducing transaction costs for buyers in the chain, particularly in situations where buyers have no ownership relation with suppliers, and/or when suppliers are located in countries with less stringent mandatory regulations. Setting quality standards and having them monitored and certified, enables core firms in the chain to exert a high degree of control over its suppliers that operate at arm's length (Gibbon and Ponte 2005; Altman 2006: 493). The voluntary character of a private standard is hence limited to the core firm who deliberately chooses for its adoption. From the perspective of primary suppliers in the value chain, private quality standards are *de facto* mandatory; they run the risk of losing business if they fail to comply with them.

2.1 Incentives for the voluntary adoption of quality standards

Overall, the reason for the voluntary adoption of quality standards is related to the buyer's interest in acquiring products that fit its product definitions. This raises the question about the strategic objectives behind this corporate interest in quality. The literature on quality standards provides at least four objectives:

1. Inter-firm compatibility in a B2B context.
The ever more complex production relations resulting from global sourcing and increasing product differentiation require tight coordination and harmonization of norms and codification (Altman 2006; Humphrey and Schmitz 2004: 353; Navdi and Waltring 2004: 53-56).

2. Overcompliance with mandatory standards.
All firms have to comply with governmental regulations related to hygiene and safety. But since product liability has become more prominent, some firms over-comply, i.e. go beyond what is legally required as a margin of defence in response to the “due diligence clause”. This clause in the British Food safety Act (1990), after which EU legislation is drafted, states: “It shall be a defence for the person charged to prove that he took all reasonable precautions and exercised all due diligence to avoid the commission of the offence by himself or by a person under his control” (Fulponi 2007: 8). The due diligence clause has greatly affected European supermarkets. In a study among 16 leading European retailers about 90 per cent report that their standards are higher than formally required, while about one-half report “significantly higher“ standards (Fulponi 2007: 11). Three-quarters of the firms indicate that the over-compliance was due to legal liability risks. Social and labour standards were judged to be most important after food safety and quality, while environmental and animal welfare standards were 3rd in the priority hierarchy (Fulponi 2007: 14-15).

Over-compliance may also be motivated by the wish to influence or pre-empt future government standards. Governments often catch up with the industry by adopting private standards and transforming them into mandatory requirements, as was the case for animal welfare, certain environmental guidelines, and guidelines for agriculture (Fulponi 2007: 9). In this way firms influence government regulation and lead it into a direction in which they consider themselves to have competitive advantages. Higher private standards may thus serve as a future barrier to entry (McCluskey 2007 19).

3. Product differentiation and branding.
In the postwar regulatory environment, standards used to be the market rules fostering mass consumption of relatively homogeneous commodities. When competition started to become more focused on quality, standards increasingly serve the function of facilitating product differentiation. In this context, quality standards are strategic tools for market penetration and brand identity to inform consumers not just about safety, but about a wide range of products and process qualities (Gibbon and Ponte 2005: 162; Navdi and Waltring 2004: 53-56).The trend towards differentiation is not a general rule, however. In some branches, companies aim at a “vulgarization” of quality content for strategic reasons, such as in the cocoa sector (Gibbon and Ponte 2005).

4. Reduction of negative social and environmental impacts
The emergence of private, ethical standards is linked to the trend of global outsourcing and to the intensification of competition. These developments have resulted in a race to the bottom in which particularly developing country suppliers are locked into a downward spiral of price-based competition at the expense of labour conditions and the natural environment. In an effort to turn this tide several United Nations bodies, supported by manifold civil society organizations, organized multilateral initiatives, such as the UNCED (1992), the UN Social Summit (1995), to address the moral responsibility of companies for the way in which their products are created (Navdi and Waltring 2004: 71).

Those quality standards that aim at inter-firm compatibility, overcompliance, or product differentiation are normally developed by private business organizations themselves. The social and environmental quality standards may be developed by non-business organizations but nevertheless adopted by private companies. However they were initiated, all these standards are voluntarily adopted by private companies.

2.2 Corporate responsibility in global value chains

The adoption of voluntary environmental or social standards in the value chain forms part of the corporate social responsibility (CSR) strategy of core firms in the chain. CSR is the principle that companies are responsible for solving problems they have caused, and for helping to solve problems that are indirectly connected to their core functions (see e.g. Wartick and Wood 1998: 76). Hence, CSR requires companies to go beyond the liability principle; to do more than what they are legally bound to do. This became a priority issue particularly when the trend of outsourcing gained strength and globalized, resulting in expanding value chains that blurred the boundaries of the firm.

Liability refers to legal responsibility and might be strict or vicarious. Liability brings in the element of intention or negligence, which is derived from the torts system of law. Responsibility refers to a moral duty or feeling to care for something, to take decisions in its interest (Duff 2005). In traditional legal philosophy a firm that enters into a contract with another firm remains independent. This implies that the firm is only held liable for actions taken by its employees and not those of the other firm (Snir 2001). Large companies exploited this limitation of liability by strategically outsourcing harmful processes to firms with limited assets, who could file for bankruptcy in case injured parties demanded compensation. Hence, the independence of firms resulted in 'moral hazard' situations, which were considered to be undesirable. The remedy encompassed changes in US and European legislations that expanded the boundary of the firm. Companies can now be held "vicariously liable" for environmental damage that are caused by one of their chain partners.

In a similar vein, stakeholders have redefined the boundaries of the firm by holding core companies in value chains morally responsible for the conditions under which their suppliers operate. The thought is that core firms have market power and ought to employ their dominance for the improvement of production conditions elsewhere, even though these suppliers are legally independent entities with their own management, and falling under foreign jurisdictions. The argument of arm's length relationships with subcontractors is no longer accepted (Phillips and Caldwell 2005).

The redefinition of chain liability and responsibility applies both to up- and downstream directions in the chain. The upstream direction involves subcontractors and suppliers (how is value added?), while downstream liability and responsibility involves business customers and end consumers (how are the products being used by consumer?) (Phillips and Caldwell 2005: 366). Examples of the latter include tobacco companies (long cancer), the weapon industry ('Bowling for Columbine'), casinos (gambling addiction), and McDonald ('Super Size me').

Corporate responses to issues concerning liability and responsibility vary widely across firms. To characterize and explain this variation, we use a typology of CSR approaches (van Tulder 2006; van Tulder *et al.* 2008). Four approaches to CSR can be distinguished: in-active, re-active, active and pro/inter-active. Each of the approaches has specific attributes that are defined by two dimensions: (moral) attitude and responsiveness (Table 1). The firm's *moral attitude* relates to the basic distinction in conventional moral theory between what is required and what is desired, or between the 'morality of duty' and the 'morality of aspiration' (Michaelson 2006). Business responses to what is required, to duties, are normally regarded as compliance. Ethics refers to corporate behaviour that goes beyond what is required. However, ethics holds two essential features: (a) the autonomy of making a choice and (b) goodness, i.e. consistency with the standards of a moral theory. Hence, corporate social performance that is not the result of an autonomous choice is compliance rather than ethics.

The second dimension is the firm's *responsiveness* that refers to the manner of interaction with inside and outside stakeholders. It relates to the process of strategy building and implementation (Van Tulder with Van der Zwart 2006). The relationship depends on the legitimacy and power of external stakeholders, as well as on the urgency of the issue at hand (Cf. Mitchell et al. 1997). Depending on the depth and strength of stakeholder relationships, companies can adopt more inward-looking or outward-looking strategies. The stakeholder perspective builds on the behavioural theory of the firm in which firms is granted a *license to operate*, provided it produces value added for a sufficient number of stakeholders. More neo-classical views of the firm concentrate on the company internal dynamism of stakeholder representation, morality and integrity building and strategy implementation. They thus adopt a primarily inward looking perspective of the firm, in which the effectiveness of the chosen strategy strongly depends on the internal articulation of interests and ideas. In the CSR discussion this focus has resulted in a separation between firms and society. More resource based views of the firm, add the company external dynamism of stakeholder influence, discourse ethics and strategy formulation to this picture. They adopt a largely outward looking perspective to the CSR challenge in which the effectiveness of the chosen strategy strongly depends on the nature and strength of outside stakeholders..

The *inactive* CSR approach is a fundamentally inward-looking (inside-in) business perspective, aimed at efficiency and competitiveness in the immediate market environment. They comply with the law, at least under those jurisdictions where the law is adequately enforced to prevent situations in which they are held liable for misconduct or damages. Good business from this perspective equals operational excellence. The *reactive* CSR approach shares the focus on efficiency but with particular attention to not making any mistakes. This requires an outside-in orientation that implies where entrepreneurs monitor their environment and manage their primary stakeholders so as to keep mounting issues in check without otherwise allowing it to give rise to fundamental changes in the business philosophy and primary production processes. Policies that primarily serve the function of over-compliance fit this CSR type. Firms develop CSR alone or association as strategic or opportunistic reactions to mandatory requirements, or defence measures to ward off possible (future) claims against the company. An *active* approach to CSR is explicitly inspired by ethical values and virtues (or 'positive duties'), in which the objectives are realised in a socially responsible manner by autonomous choice, and regardless of actual or potential stakeholder pressures. Firms follow a *pro-active* CSR approach when they (actively) involve external stakeholders, right at the beginning of an issue's life cycle. In the context of value chain standard development, this approach materializes through a partnership structure during initiation.

Table 1 Typology of CSR approaches

		Moral attitude	
		Liability	Responsibility
Responsiveness	Inward-looking	**Inactive** **(Corporate Self Responsibility)**	**Active** **(Corporate Social Responsibility)**
	Outward-looking	**Reactive** **(Corporate Social Responsiveness)**	**Pro/Interactive** **(Corporate Societal Responsibility)**

Adapted from: van Tulder (2006) and van Tulder *et al.* (2008)

The differentiation of CSR strategies facilitates the examination of differences between and within companies, as well as of CSR strategy change over time. It departs from the notion also that there is no single 'best-practice' business case for CSR, but it is important to consider the environmental context of both the company's moral attitude and responsiveness. Most of the ethically motivated corporate strategies have in common that they are adopted to defend or improve the firm's reputation vis-à-vis societal stakeholders. Since the risk of reputation damage is not equally distributed over companies, their moral attitude and responsiveness, and hence their CSR strategy, will vary with the concern for their reputation. At least three factors determine vulnerability to reputation damage:
(a) The visibility of the company to consumers. Demand-driven value chains seem to be more vulnerable to reputation damage, because the branded core firms, located at the end of the value chain, are highly visible to end consumers. In case of social or environmental concern among consumers, these companies can easily be identified and targeted. In contrast, suppliers upstream who are operating in B2B contexts are less visible to the general public and consequently less vulnerable to reputation damage inflicted by civil society stakeholders. For example, in the global cocoa chain the international commodity

traders rather than retailers hold a key position. They are privately owned companies with low public profile, and with low interest in ethical sourcing (Roberts 2003: 168).
(b) Civil society interest in ethical features of a product. Some products appeal more to public sentiment than others and hence raise more civil society concern. Violations of animal welfare are a case in point. But also in respect of forest management there is more public interest in the sustainability of wood products then there is for paper. This hindered the implementation of Forest Stewardship Council certification, because paper and wood products involve the same suppliers (Roberts 2003:167).
(c) The presence of alternative products. In case of near monopoly situations it is unlikely that consumer boycotts can be used to affect corporate behaviour, because the lack of alternative consumers could resort to.

3. Private quality standards and developing country suppliers

In the context of economic development, industrial quality standards are considered to have ambiguous effects: they may either serve as a *barrier* or a *catalyst* to development (Henson and Jaffee 2006). Standards may seriously restrict business opportunities for suppliers because the improvement of management systems and the embracement of new environmental and social standards usually form a high burden for farms and firms. The latter often also carry the financial responsibility for the certification of their performance by professional third-party organizations. Moreover, the improvement of social and environmental performance of growers does not necessarily lead to a larger retention of the value added or to more bargaining power, not even when the total chain income increases. It could just prevent the exclusion from the chain (Muradian and Pelupessy 2005: 2039). Those suppliers who cannot not implement the new quality standards may eventually be marginalized, i.e. being pushed back to lower value-added activities, or being excluded from the GVC altogether (Gibbon and Ponte 2005: 138).

The pressures that quality standards put on suppliers make chain standards often being perceived as non-tariff trade barriers (NTB) that protect domestic (high-income country) producers against imports from developing countries (Henson and Jaffee 2006). Cases of alleged NTBs can be submitted to the dispute settlement body under the WTO, but they involve mostly mandatory, public food safety regulation. Privately adopted, voluntary quality standards normally do not violate the WTO non-discrimination principle (Muradian and Pelupessy 2005: 2033), but are increasingly considered as NTB (Danse and Vellema 2007).

On the other hand, quality standards could also be seen as a catalyst for development. The adoption and implementation of these standards has in fact become a condition *sine qua non* for developing country suppliers. It is a requirement for getting access, at least to global value chains that serve international markets. In this way, the adoption of standards offers developing country suppliers export opportunities. Further, as actors in global value chains, developing country suppliers may be able to upgrade their position in the chain. Industrial upgrading refers to a process of “improving the ability of a firm or an economy to move to more profitable and/or technologically sophisticated capital and skill-intensive economic niches (Gereffi 1999: 52). Various forms of upgrading can be distinguished, and the categorization most commonly used is that from Humphrey and Schmitz (2004: 352) who distinguish four types of upgrading:

1. *Process upgrading* More efficient transformation of inputs into outputs by reorganizing the production process or introducing innovations

2. *Product upgrading* Moving into more sophisticated product lines (increased unit values)

3. *Functional upgrading* Acquiring new functions in the chain (such as design, marketing, branding) to increase overall skill content of activities. This route is in the literature usually discussed as the transition from assembly to OEM (original equipment manufacturer) to ODM (own-design manufacturer) to OBM (own-brand manufacturer)

4. *Inter-chain upgrading* Using the knowledge acquired in particular chain functions to move horizontally into different sectors (e.g. television producers that move into computer monitors)

The section below explains each of these upgrading types in more detail and explores the manner in which quality standards could facilitate or restrict upgrading opportunities for developing country suppliers.

3.1 Process and product upgrading

Process and product upgrading involve improvements in technology, finance, human resources, and organization. *Process* upgrading refers to the increased efficiency in production, or to production processes that meet stricter criterions in respect of safety, environmental-friendliness, or socio-economic conditions for employees. Process upgrading may also involve more transparent management procedures. *Product* upgrading refers to innovative products and higher differentiation of products.

Whereas the upgrading of processes or products are two distinct processes, both are treated as one category in this paper. In the contexts of quality standards the distinction between product and process has blurred, because processes might significantly influence the characteristics of the end products. Gibbon and Ponte (2005: 89), for instance, raise the question of whether organic coffee should be perceived as a new product or as the result of an improved production process. Moreover, both forms of upgrading entail similar conditions.

Process and product upgrading require suppliers to invest, which they can only do in a stabilized and relatively predictable business environment. The typical situation in developing countries is the contrary, with farmers or cooperatives depending on volatile international markets and suffering from information asymmetries. Garcia Martinez and

Poole (2004), for instance, describe the coordination failures in the Turkish citrus export sector where fresh produce suppliers are poorly informed by intermediaries about quality demands of the buyers. The "entrepreneurial and opportunistic" exporters tend to be generalists rather than specializing in fresh produce. They reportedly have a trading mentality and an interest in high margins rather than in long-term partnerships. They therefore fail to understand the quality demands. Citrus is considered to be 'just' another commodity.

A more stable and predictable business climate for suppliers can only be achieved through longer-term vertical relationships within the GVC that build trust and confidence. Gibbon and Ponte (2005: 151) list the major elements of an enabling environment to product and process upgrading:

(a) Security of contract through medium or long-term purchase commitments on the part of buyers;
(b) Price stability through or multi-season prices, or the opportunity of compensating falling prices by higher volume orders;
(c) Direct sales to retailers, implying that suppliers have attained the role of first tier supplier;
(d) Predictability of prices and volumes in order to assess investment in (cold) storage, transportation, long-term planning, economies-of-scale planning, better risk spreading, etc.

Farmers' participation in private quality standards may facilitate a stable and more predictable business environment. Speaking of the coffee sector, Muradian and Pelupessy (2005: 2040) conclude that the adoption of quality standards by farmers may facilitate coordination between roasters/traders and some growers. It may improve the reputation of farmers and cooperatives to the extent that the latter may achieve the status of preferred supplier. In this way, the adoption of quality standards may lead to upgrading opportunities and eventually help growers retaining a higher share of the chain income.

Development organizations have appreciated this scenario and are facilitating producers to become more attractive as business partners and apt as value chain suppliers. Such "value chain development" (Altenburg 2007; Campell 2007) or "chain empowerment" (KIT *et al* 2006) focuses on both process and product upgrading activities. Value chain development may be related to the management of producers' associations, the improvement of negotiation skills, the mediation of conflicts, trust building, or involve support of agricultural techniques, such as the introduction of new, virus-free multiplication techniques, or the introduction of new plant varieties.

Whether deeper integration into the GVC eventually improves the socio-economic position of primary suppliers remains to be seen. First, the impact of investment in process upgrading may be limited when it replaces extant production capacity. In coffee, for instance, new export preparation plants have largely supplanted government or cooperative-owned capacity. Investment in upgrading thus redistributed the roles in the chain within the country, rather than improving them all together (Gibbon and Ponte 2005: 155). Second, meeting the new quality standards' requirements through process and product upgrading may just prevent expulsion from the chain; it keeps access to the chain open. The implication is that participation in the standard does not result in price premiums for producers, but rather is a new, *de facto* market requirement (Muradian and Pelupessy 2005: 2036, 2039).

3.2 Functional upgrading

Functional upgrading refers to the acquiring of new capabilities in order to access downstream activities in global value chains. As was explained in section 1.2, functional upgrading involves obtaining functions that used to be carried out by other firms within the same GVC. As the targeted competitor is expected to fight back, functional upgrading aspirations may result in a rivalry among suppliers, a situation which that may strengthen the bargaining position of the buyer (Meyer-Stamer 2004: 338-340).

The fight of the Ethiopian coffee farmers to protect their geographic names, discussed above, offers an example of such intra-chain rivalry. The coffee farmers follow a strategy of upgrading based on the geographic identification of production. Geographic authenticity is a special attribute of a product that creates "origin-based trust" (Gibbon and Ponte 2005: 184). Geographic indications reduce the distance between producers and consumers, enabling the former to engage in B2C marketing and to apply for geographical tradename protection. This strategy is implicitly supported by the European Union, the defender of "old world" producers of wines and cheeses, that recently renewed its legislation in the area of geographic indications[3]. However, the intellectual property of geographic indications is challenged in the WTO by "new worlds" producers who argue that geographic denominations no longer link preparation processes with locality (Gibbon and Ponte 2005: 184). Hence, Starbucks could resort to US trade regulation as a defence mechanism against the upgrading aspirations of the Ethiopians within its coffee chain.

Functional upgrading opportunities may be limited further by technical issues, strategic innovations by core firms, and intergovernmental regulations. In coffee, for example, the possibilities for processing and roasting are restricted, because roasted coffee becomes stale much more quickly, while green coffee (the usual form of coffee) can be stored for longer periods. Beating core firms in coffee chains is also difficult because these firms possess the market knowledge and the technical know-how of blending different coffee varieties from regions from around the world (Gibbon and Ponte 2005: 152-153). In cocoa chains, technical innovations through which cocoa can be broken down into its constituting parts have reduced the necessity to source multiple cocoa varieties of beans, or beans from different regions. The traders/grinders have thus captured from cocoa growers the underlying product quality (Gibbon and Ponte 2005: 135-136). By degrading the value of the raw material the opportunities for upgrading by primary producers have diminished as well..

[3] EC Regulations 2081/92 and 2082/92 provide protection of food names on a geographical basis. The EU distinguishes two categories: 'protected designation of the origin' (PDO), and (b) 'protected geographical indications' (PGI). Each protected product has its own standard (McCluskey 2007).

Although there are examples of successful upgrading to first tier supplier, such as Kenya's largest fresh vegetable and cutflower producer/exporter *Homegrown*, that has acquired several companies in the UK (Gibbon and Ponte 2005:156), the prospects for functional upgrading by African suppliers are, overall, bleak. Gibbon and Ponte (2005: 125-129) offer the perspective of markets that are differentiated in tiers of enterprises performing different functions and with radically different source bases. African companies are generally second-tier suppliers and almost absent as first-tier suppliers. They seldom move upward, because African firms have no economies of scale, no cost advantages, and few product differentiation advantages. In order to become first tier supplier, they should (a) be capable of providing more varieties of the product, year-round, and the same product from more than one country/region, (b) finance and hold inventory on behalf of the core firms and deliver on a quick response base, and (c) actively engage in identifying and providing additional services.

To what extent the adoption of quality standards may influence processes of functional upgrading is unclear. To our knowledge, the GVC literature has been silent on this issue so far. Intuitively it can be expected that standards enhance the transparency in the chain, a condition to functional upgrading. Wherever standards also involve more direct contacts between retailer and primary supplier, they may facilitate a promotion of the supplier status to for instance preferred supplier, or even the acquiring of direct marketing activities by suppliers themselves.

3.3 Inter-chain upgrading

Inter-chain upgrading refers to getting access to other chains, which may include alternative global value chains, led by other European or American core companies. New global value chains, for instance those that end up in China and India should also be considered. Particularly relevant are also the emerging regional or local value chains in developing countries that witness a "supermarket revolution" (Humphrey 2007; Reardon and Hopkins 2006). Due to urbanization, the expansion of women workforce, per capita income growth, and the diffusion refrigerators, the share of supermarkets in food retail is rapidly increasing in all developing countries. This process started in Latin America and was followed by Asian and recently also by Sub-Saharan African countries (Reardon et al 2003). South African supermarket chains are investing in mainly East African countries and compete with internationally expanding Kenyan supermarket chains.

Quality standards are likely to influence inter-chain upgrading opportunities for developing country suppliers in several ways. Suppliers that meet general global retail standards, such as Eurepgap, may also be capable of reducing their dependency on a single chain by supplying other large retail firms in Europe or North America, or in the Asian emerging economies. Particularly interesting for suppliers is the potential link between global and regional value chains. Those suppliers who serve global chains may be well equipped to access regional chains. For other suppliers it may first only be feasible to upgrade their operations to supply the regional chains, while in a second upgrading phase they could be capable of meeting the higher standards of global value chains.

The rapid changes in food retail will have a deep impact on developing countries economies that are still highly dependent on agricultural production. There is widespread concern about the layer of small farmers that cannot meet the quality requirements for both global and regional retail value chains, and hence face the risk of further marginalization from any value chain (see e.g. Cacho 2003; Chen et al 2005; KIT et al 2006; Weatherspoon and Reardon 2003).

3.4 Functional 'downgrading'

Some authors have raised questions about the metaphorical meaning of upgrading as a "moving up" process. Upgrading is not a priori about direction (Meyer-Stamer 2004: 332): "Upgrading means doing things differently, and/or doing different things – not different compared to previous practices in the same company, but compared to competitors". Firms may have more options to improve their competitiveness, not into vertical but horizontal direction, vis-à-vis competing firms that perform similar activities. "Functional downgrading" may therefore also be a viable strategy; firms retreat from downstream marketing activities in order to concentrate on specialized production and innovation (Meyer-Stamer 2004: 328-331). In Africa the path of functional downgrading has been followed by locally-owned export firms that increasingly carried out local trading functions for exporting multinational companies. Where it is successful, scale upgrading and producing larger volumes are common elements. Downgrading can be found particularly in the *Market*- type value chain, where competing African suppliers are relatively small (e.g. in the case of fresh vegetables), or where the market structure is highly fragmented (such as cotton) (Gibbon and Ponte 2005: 158). The involvement of foreign companies seems to be vital. According to Gibbon and Ponte (2005: 160), successful private organization largely depends on concentrated market power, which only consists with the non-African business elite. "As a result, any meaningful improvement in Africa's position within global value chains is bound to rely on FDI in the short term and a resuscitation of the capacities of the African state in the longer one".

3.5 Upgrading and global value chain type

The *type* of the global value chain (Exhibit 1) seems to have a considerable influence on the success of supplier upgrading. In M*arket-type* value chains, producers experience neither support for, nor blockades to upgrading from within the chain. Buyers have no incentive to invest in a relationship because there are suppliers everywhere. Suppliers can find alternative buyers as well. *Relational* value chains are more supportive to an open ended upgrading path, because they are characterized by intense knowledge-based interaction between supplier and buyer. Due to the high competence levels required, developing country suppliers do seldom participate in such chains (Meyer-Stamer 2004).

Retail chains that incorporate developing country suppliers are basically *Captive* value chains. The standards are dictated by core firms while the switching costs for suppliers are relatively high. Developing country producers may experience fast product and process upgrading, partly also because the core firms have an interest in assisting suppliers to enhance their capabilities in order to reduce the risk of supplier failure. Such assistance may end at the moment that sufficient alternative suppliers are available (Humphrey and Schmitz 2004: 354).

Captive chains offer limited opportunities for other than process and product upgrading. Functional upgrading might clash with the core competencies of the buyer, as was pointed out above. Another reason is the shift in the global value chain's source of power towards non-production activities, notable branding, marketing, product development and coordination of inter-firm relations. Developing country suppliers have usually no competitive advantages in these services (Humphrey and Schmitz 2004: 359-360). Finally, upgrading requires local firms to continuously invest in people, organization and equipment, which is often beyond the capability of the local firm. Upgrading in production is possible in small steps, but in functional upgrading requires bigger steps. Particularly developing country suppliers lack the capital, foreign market knowledge, and financial expertise (Humphrey and Schmitz 2004: 359-360).

4. Upgrading opportunities under quality standards

4.1 Measuring impacts of quality standards

Literature on the impact of quality standards on suppliers' upgrading opportunities is extremely scarce, and the area is largely under-researched. In the context of the Laurus Project it was therefore decided to conduct an explorative study on such impacts. In view of preliminary hypotheses development we have looked into existing categorizations of private standards to discover indications that particular groups of standards would perform better in view of supplier upgrading than others.

Several authors discuss varieties of standards (for example, Dankers 2003; Fulponi 2007; Henson and Jaffee 2006; Gibbon and Ponte 2005; and McCluskey 2007), but without categorizing them according to specific characteristics. Garcia Martinez and Poole (2004) make a distinction between horizontal and vertical standards. Horizontal standards apply to specific nodes in the chain, while vertical standards cover the nodes of the entire chain. Muradian and Pelupessy (2005) introduce a typology of coffee-related quality standards, based on five possible parties that initiate standards. The most comprehensive attempt to introduce an overall typology of a wide variety of standards is made by Nadvi and Wältring (2004: 60). They list a set of criterions that can be used to characterize and group quality standards, including *Scope* (process or product standards), *Function* (social, labour, environmental, quality, safety, ethical), *Key drivers* (public, private, public-private, *Forms*: (management standards, CoC, labels), *Coverage* (generic, sector, firm/chain), *Regulatory implications* (mandatory, necessary for competition, voluntary), and *Geographical reach* (national, regional, international). The same authors also introduce an historical dimension through the distinction of generations of value chain standards, which differ primarily in function and key drivers.

All of these classifications are meant to serve as empirical categories. They group standards but they are not based on conceptual models intended to explain impacts on specific categories of GVC stakeholders. For this reason we have chosen for an explorative approach in which quality standards are classified along three different categorical dimensions: (a) standard initiator, (b) standard sustainable issue focus, and (c) standard product focus. For each of these dimensions we hypothize effects of the standard on upgrading opportunities of developing country suppliers.

A. Standard initiator

The standard initiator dimension to some extent resembles earlier typologies of 'standard initiators' (Muradian and Pelupessy 2005), and standard 'key drivers' (Nadvi and Wältring 2004). However, in line with the distinction of CSR approaches (Van Tulder 2006; van Tulder *et al* 2008) the five initiators are placed in the following order:
(a) Business associations
(b) Individual firms
(c) (Inter) governmental organizations
(d) Non governmental organizations (NGO)
(e) Partnerships of business, government and civil society actors

The specific order is inspired by the distinction of CSR approaches. It is hypothized that the voluntary adoption of standards that are developed by business associations is an inactive CSR approach: firms follow their competitors, because they do not want, or cannot stay behind. The development and adoption of quality standards by firms themselves is considered to be an active CSR approach, whereas the voluntary adoption of quality standards or codes of conduct that have been designed by intergovernmental organizations or NGOs is a more re-active approach. Collaborating in partnerships with non-market actors in the development of new quality standards that are subsequently adopted is a pro-active CSR approach.

The explorative proposition used in this paper is that standards from NGO and tri-partite partnerships show most beneficial impacts on process, product and perhaps functional upgrading opportunities. It can be assumed that these standards are not primarily focused on the business case and therefore entail more opportunities for upgrading in developing countries than do business-developed standards. Standards initiated by business associations and individual companies can be assumed to reflect the core firm's concern about preventing liability issues and reputation damage, but might be facilitative of one particular form of upgrading: inter-chain upgrading.

B. Standard sustainability issue

The dimension of the standard's sustainability issue focus includes four categories:
(a) Social issues

(b) Environmental issues
(c) Social and environmental issues combined
(d) Food safety issues
The explorative proposition is that social and social/environmental standards have a more positive influence on process and product upgrading in developing countries than have private food safety standards. The latter are focused on product qualities that are solely relevant at the end of the value chain, while social and social/environmental standards are meant to improve production processes with developing country suppliers. Since a substantial number of standards have a combined social and environmental objective, these standards are considered to be a separate category in the analysis.

C. Standard product focus
The third dimension applies to the product level. Quality standards may either be focused on a specific product category or have a generic focus. Ideally, several distinct product categories should be measured individually. However, in view of the relative small sample of standards that can be studied, only two categories are used:
(a) Generic standards
(b) Product-specific standards (focus on fish/meat, FFV, flowers, or ethnic products).

The tentative proposition regarding the impact of these two categories of quality standards is two-fold. First, generic standards are more beneficial to inter-chain upgrading since their requirements are not specific for particular product GVCs. Second, product-specific standards are more beneficial to product/process upgrading, because it is in the interest of core firms to establish longer-term relationships with suppliers and to support them in upgrading.

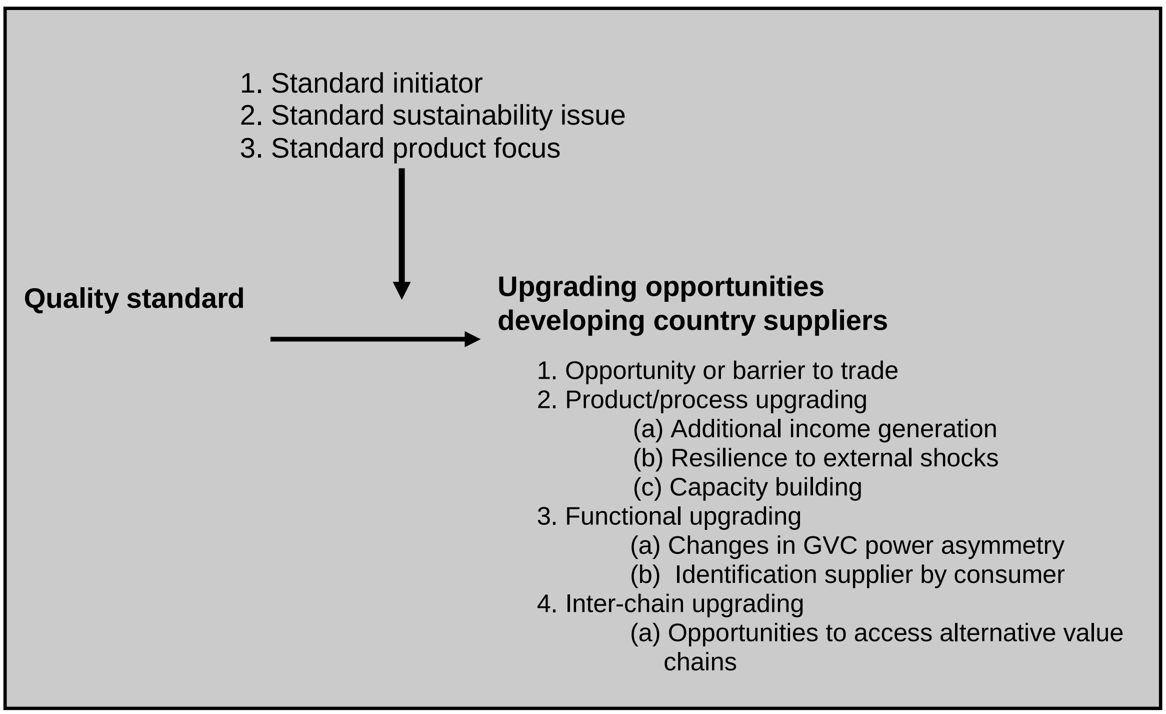
4.2 Methodology

To analyse the impacts of voluntarily adopted quality standards on upgrading, a sample of 36 well known voluntary standards relevant to the retail industry were selected (Table 2). We focused first on the overall perception in respect of trade opportunities, and then on a number of issues that are considered to be indicators for the four forms of industrial upgrading (Figure 2). Investment *in product or process upgrading* requires additional income that is to be derived from the adoption of the quality standard or enhanced resilience to external shocks, such as price volatility, while upgrading of management processes is highly dependent on the development of organizational skills and technical capacity. *Functional upgrading* almost always changes in the power constellation within the value chain as it involves intra-chain competition. One specific function that could be acquired by suppliers is marketing. However, this opportunity highly depends on the possibilities for suppliers to be identified and recognized by end consumers. In respect of *inter-chain upgrading* the most relevant condition is extent to which quality standards facilitate suppliers to obtain access to alternative value chains and markets.

Figure 2 summarizes our approach in a conceptual model. The main research question is reflected in the relationship between quality standards and upgrading opportunities (in bold). The moderating variables are the dimensions of standard's initiator, sustainability issue and product focus, while the depending variable is operationalized in three upgrading categories, each with a different set of indicators as discussed above.

The data collection strategy consisted of a survey of literature related to quality standards. A wide variety of relevant publications was analysed: websites, scientific articles and reports, policy reports, and online newspaper articles (see Annex 1 for the references). Most of the sources were found via the Internet in Spring 2007. The publications were selected because they entailed *perceptions* of the impact of standards on upgrading opportunities in developing countries. Hence, this study measures perception of impacts not real impact as such.

Figure 2 Conceptual research model



4.3 Analysis

Table 3 gives an overview of the results. It is a cross tabulation of the upgrading effects by quality standards category, measured through seven indicators. The percentages refer to the share of standards within the category that is perceived to have or have not the indicated effect. The 'opportunity to trade' is not used as an indicator but serves as an impression of the overall effect of the standard categories on trading opportunities for suppliers.

4.3.1 Opportunity or barrier to trade

The general conclusion that emerges from the literature consulted (Table 3) is that the majority of voluntary quality standards in the sample (60 per cent) are considered to offer trading opportunities for developing country suppliers. This finding can in part be explained by a rather broad definition of the term ‘opportunity’: many publications speak of trading opportunities *provided that* the conditions for adoption of the standard can be met. The capability of complying to standards requirements offers producers access to export markets through global value chains.

Most trading opportunities seem to be provided by social and social-environmental standards, generic standards, and those initiated by individual NGOs and by individual companies. Many of these standards, such as Fair Trade and Starbuck’s supplier Code, provide suppliers with premium prices for their products, which can make production and exporting profitable. Products that carry labels communicating the fair trade or environmental qualities of the standard to consumers benefit from the growing consumer interest in products that are being produced in a sustainable way. Participation in these standards offers suppliers a licence to serve expanding markets that are partially protected with high entry barriers. Participation in ‘buyer codes’ that intend to protect labour rights and the environment also helps attracting foreign investment. If improved production processes are conducive to local social and political stability, quality standards are instrumental in fulfilling an essential precondition for sustained investment growth. For example, the adoption of MPS by the emerging flower production sector in Ethiopia is considered to be vital in attracting European flower firms who have access to the main European markets. However, perceptions of the ‘opportunity effect’ depend largely on the stake that actors have in the value chain. Employers, for instance, tend to perceive ILO-based working standards more negatively than employees do, while environmental requirements may be a burden for firms, but a blessing for local communities.

Around 40 per cent of quality standards are considered to constitute barriers to trade. Two reasons are returning in the literature. First, all standards raise production costs, because of higher wages, ensuring a safer working environment, better book keeping, investment in hardware, or mandatory certification by third parties. The higher costs diminish the typical competitive advantage of developing countries, i.e. low labour costs. Higher production costs are considered to be especially harmful to trading opportunities of developing countries in the context of the buyers’ continuous push for lower prices. Second, the proliferation of private standards makes it hard for suppliers who serve more than one global value chain. When each chain adopts a distinct standard suppliers are required to maintain specific management procedures for different batches. Some

Table 2 Categorization of 36 voluntary quality standards

	Standards	Initiator: Business association	Initiator: Individual company	Initiator: (Inter) govern-mental body	Initiator: Individual NGO	Initiator: Partner-ship	Issue focus: Social	Issue focus: Environ-mental	Issue focus: Social and environmental	Issue focus: Food safety	Product level: Product specific	Product level: Generic
1	Max Havelaar				1		1				1	
2	Utz Certified	1							1		1	
3	European Fair Trade Association	1					1					1
4	Fairtrade Labelling Organisation				1		1				1	
5	Common Codes for the Coffee Community				1				1		1	
6	Ethical Tea Partnership	1					1				1	
7	Rain Forest Alliance/Sustainable Agricultural Network				1			1			1	
8	Nature and More		1					1			1	
9	Sara Lee's Supplier Selection Guidelines		1						1		1	
10	Starbucks Green Coffee Purchasing Guidelines		1						1		1	
11	Good Manufacturing Practices			1						1		1
12	Global Food Safety Initiative	1								1	1	
13	EUREPGAP Code	1								1	1	
14	CBL hygiëne code	1								1	1	
15	British Retail Consortium code	1							1			1
16	QS	1								1	1	
17	Sustainable Agriculture Initiative Platform	1						1				1
18	ASAP (Ahold)					1	1					1
19	UN Guidelines on consumer protection			1								1
20	National Consumer Council			1				1				1
21	Race to the Top project				1				1			1
22	EKO			1				1			1	

23	Sustainable Consumption Roundtable					1		1				1
24	Ethical Trading Initiative Base Code					1	1					1
25	FAO Code for responsible fisheries			1				1			1	
26	Marine Stewardship Council		1					1			1	
27	OECD Guidelines for Multinational Enterprises			1					1			1
28	Global Compact			1					1			1
29	ISO 22000					1				1		1
30	ILO Convention 184			1			1					1
31	FAO Code of Conduct on Pesticides			1				1				1
32	Codex Alimentarius			1						1	1	
33	MPS-A,B,C	1						1			1	
34	MPS SQ	1					1				1	
35	Fair Flowers & Plants					1			1		1	
36	Forest Stewardship Council					**1**			**1**		**1**	
	Total	**11**	**4**	**10**	**5**	**6**	**8**	**10**	**10**	**7**	**21**	**15**

Table 3 Explorative impact assessment of 36 voluntary quality standards on suppliers in developing countries
In per cent, rounded at 5; SdB standards in numbers
(+ indicates higher and – lower than the overall mean)

	Overall perception		Additional income		Organizational skills		Capacity building		Resilience to external shocks		Power asymmetry		Identification with consumers		Access to other chains	
	Opportunity	Barrier	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Overall (N=36)	60	40	40	60	70	30	75	25	80	20	25	75	15	85	85	15
Initiator																
Business association (N=11)	60+	40	25-	75	70-	30	70-	30	100+	0	45+	55	10-	90	90+	10
Individual firm (N=4)	70+	30	50+	50	50-	50	50-	50	75-	25	25-	75	75+	25	50-	50
(Inter) Governmental body (N=10)	40-	60	30-	70	50-	50	70-	30	50-	50	0-	100	10-	90	80-	20
Individual NGO (N=5)	80+	20	80+	20	100+	0	100+	0	100+	0	40+	60	20+	80	100+	0
Partnership business, government, NGO (N=6)	65+	35	50+	50	80+	20	80+	20	80-	20	50+	50	0-	100	100+	0
Standard Focus (N=35)																
Social (N=8)	90+	10	60+	40	90+	10	100+	0	90+	10	40+	60	0-	100	90+	10
Environmental (N=10)	60+	40	55+	45	70-	30	50-	50	60-	40	20-	80	20+	80	90+	10
Social and environmental (N=10)	80+	20	30-	70	70-	30	90+	10	70-	30	30+	70	30+	70	80+	20
Food safety (N=7)	0-	100	15-	85	55-	45	70-	30	100+	0	40+	60	15-	85	100+	0
Standard product level																
Generic (N=15)	70+	30	40-	60	55-	45	70-	30	65-	35	0-	100	15-	85	85-	15
Product specific (N=21)	50+	50	45+	55	80+	20	80+	20	90+	10	55+	45	20+	80	85-	15
Super de Boer Standards																
Utz Certified	1		1		1		1		1			1		1	1	
Rainforest Alliance	1		1		1		1		1			1		1	1	
Eurepgap		1		1	1		1		1		1			1	1	
Ethical trading Initiative	1		1		1		1		1			1		1	1	
Marine Stewardship Council		1	1		1			1	1			1	1		1	
	3	2	4	1	5	0	4	1	5	0	1	4	1	4	5	0

Sources, see Annex 1

suppliers are more vulnerable than others in this respect. Standard-related investments are most problematic for small and medium-sized firms, and small-scale farmers.

The quality standards that are perceived to raise the highest barriers to trade are those initiated by (inter)governmental organizations (60 per cent perceived as barrier) and food standards (all seven standards in the sample perceived as barrier). The latter finding may be explained by the fact that in the case of food safety standards the benefits of the quality attributes is only at the end of the value chain, with the end consumer. Environmental and social standards may be considered to be less a barrier since the producers or the producer region are likely to benefit from the quality attributes themselves.

4.3.2 Process and product upgrading

Additional income

Upgrading activities require additional income that can be used for investments. From the literature survey can be concluded that the majority of standards (60 per cent) are considered to fail in generating extra supplier income. Standards from business associations and intergovernmental bodies, and food safety standards score relatively low in this respect (respectively 25, 30 per cent, and 15 per cent). Most of those have no intention whatsoever in respect of higher supplier incomes, and/or require high investment and certification costs that may offset potential income increases.

The reasons for the better performance of the remaining 40 per cent of standards tend to vary widely. Overall, social standards and those initiated by NGOs, partnerships and individual companies are considered add income. Max Havelaar and FLO offer farmers minimum price guarantees based on a long-term collaborative relationship. Many standards focus on management processes that are considered to reduce costs due to efficiency improvements. Suppliers that are certified in the context of specific standards have a prospect of being paid a premium price relative to international market prices, although these might be highly volatile. The FAO Code of Conduct on Pesticides is perceived to lower the occurrence of poisoning cases thereby contributing to the health of employees, which improves the effectiveness of the organization. Some standards, such as Good Manufacturing Practices, are found to foster industrial concentration and, in this way, enhancing the profitability of an industry sector.

Organizational skills

More than two-thirds of the standards are perceived to facilitate organizational skills development with suppliers in developing countries. Many standards require small-scale producers to form associations to reduce transactions costs. Farm cooperatives are capable of supplying larger quantities, they enable the introduction of mutual monitoring systems (e.g. Utz Certified), build social networks, and improve the bargaining power of farmers. However, cooperation requires the development of organizational skills, which may not be a realistic option for every supplier.

Some standards provide training for suppliers in planning, book keeping, data collection, and handling communication systems. The standards initiated by NGOs and standards that focus on social issues are perceived to perform best in this respect, while product-specific standards do better than generic standards. Least contributing to organizational skills seem to be the standards initiated by individual firms and governmental bodies, while food safety and generic standards score relatively low as well.

Capacity building

Three-quarters of all standards in the sample is said to contribute to technical capacity building of primary suppliers in developing countries. Many standards involve organizations that provide for training to improve technical and management capabilities in responsible and efficient farming practices, such as safe use of agro-chemicals, reduction of chemical inputs, safe waste management, maintenance soil fertility, water recycling, renewable energy use, forest and biodiversity maintenance, or proper transportation of produce. Best performing standards in this respect are those designed by individual NGOs and those with a social focus. Product-specific standards do slightly better than do generic standards. The lowest scores can be found with standards initiated by individual companies, while only half of the environmental standards are said to be helpful in capacity building.

Resilience to external shocks

The far majority of standards in the sample (80 per cent) are considered to contribute to the resilience of developing country suppliers. Certified producers (e.g. under EurepGap) promote confidence among alternative buyers and consumers, thereby reducing their dependency on a single global value chain. The prospect of alternative outlets stimulates investment in upgrading. Quality standards also improve resilience by helping firms and farms to produce more efficiently, for instance by reducing transaction costs associated with middlemen (Starbucks), or reducing rejection rates (ISO 22000). The sustainable fisheries standards (FAO and MSC) contribute to resilience because their objective is a prevention of a collapse of fish stocks and the continuation of fish-related income generation in the future. A minority of standards offer minimum prices higher than the going rates and provide farmers with up to 60 per cent upfront payments (FLO, Max Havelaar, EFTA), or offer producers easier access to affordable credit (Starbucks, FSC). By doing so, these standards either ensure farmers an income or at least reduce the need to resort to expensive local money lenders. This creates a more stable business environment for farmers in which they can invest in upgrading. The best standards in this respect are those initiated by business associations and individual NGOs, and those focusing on food safety and social issues. Product-specific standards have a substantial higher score than generic standards. Least contributing to resilience are considered to be standards initiated by intergovernmental bodies or those focusing on environmental issues.

4.3.3 Functional upgrading

Tackling power asymmetry in the chain
Overall, voluntary quality standards are not perceived to be important tools for changing the dependency of primary producers in developing countries. Only 25 per cent of standards are considered to bring some positive changes, basically because they improve the transparency of the value chains by eliminating middlemen. The business of the latter is built on withholding vital market information to producers. Better access to information in combination with the promotion of producers' associations offers farmers a better negotiation position in the chain. Best performing standards in this respect are those initiated by partnerships and by business associations, those focusing on social and food safety issues, and product-specific standards. None of the generic standards and of those initiated by intergovernmental bodies are considered to have a positive impact on power relations in value chains.

Identifiable for end-consumers
One approach in functional upgrading by primary producers is that they develop their own marketing strategy in end-markets. This requires that the producer or producer region is identifiable by consumers. However, many standards use labels on the end-product to communicate *how* it has been produced, but seldom *where* and *by whom*. Geographical indication is mandatory only to some extent. In all countries that have adopted the Codex Alimentarius, supermarkets must indicate the country of origin of their products, which, in case of processed foods, is the country where the processing is performed. On a voluntary basis, several standards, among them GMP, QS, SAI, ETI, and FFP, have a B2B tracking system in place in support of supply chain control, but such a system is usually not accessible for consumers. Only 15 per cent of all standards offer end-consumers a feasible opportunity to trace the origin of their product back through the global value chain to the primary producer. The best opportunities in this respect are offered by standards from individual companies, such as Starbucks' purchasing guidelines and Nature and More. Standards that have a combined social and environmental focus score slightly better than do the other standard groups. None of the standards developed by partnerships or those that focus on social issues alone are considered to offer opportunities to identify primary producers.

4.3.4 Inter-chain upgrading

Access to other chains
The overwhelming majority of standards (85 per cent) are perceived to help suppliers entering alternative value chains, but this seems to be an unintended side effect. A plausible explanation is that most global value chains have quality systems in place that require suppliers to improve their management practices, and enhanced efficiency in management may suit several value chains. But there are variations in this effect. Some standards, such as FLO and FSC, help producers gaining extra income that can be used to diversify into alternative commercial crops that serve new value chains. Another possibility is that meeting international standards as such is sufficient to gain the

confidence of local subsidiaries of multinational firms, such as hotels and supermarket chains. Regional value chains dominated by local firms could also still be served, even though the social, environmental or food safety qualities of the products may less relevant here. In several publications it was pointed out that private quality standards normally do not hinder suppliers to access other value chains, especially not in the context of booming commodity markets. When for instance FSC requirements are considered to be too burdensome, un-certified wood can easily find its way to Asian emerging markets.

There seems to be very little variation in this effect among the distinct standard categories in the sample. Lowest score the standards initiated by individual companies. Their standards may be relatively specific and may be less easy to translate into alternative standards when accessing other value chains.

4.3.5 Performance by standard category

To roughly evaluate the overall performance in respect of upgrading opportunities, the scores of the individual standard categories per indicator are compared with the overall means. All percentages that exceed the overall mean receive a "+".

Table 4 Relative performance in respect of upgrading by standard category

Standard category	Occurrences of higher than the overall mean
A. standard initiator	
Business Associations	3
Individual firms	2
Governments	0
Individual NGOs	7
Partnerships	5
B. Standard sustainable issue focus	
Social	6
Environmental	3
Social and environmental	4
Food safety	3
C. Standard product focus	
Generic	0
Product-specific	6

Table 4 shows that one category stands out: the standards initiated by individual NGOs. This category of standards scores higher than the overall mean on all seven indicators. The two other standard categories that also score relatively high are those with a focus on social issues and product-specific standards. Noteworthy is also that the standards initiated by (inter) governmental bodies and generic standards score lower than the overall mean on all indicators.

4.3.6 Performance standards relevant to Super de Boer

Five of the standards in the sample have special relevance to Super de Boer: Utz Certified, Rain Forest Alliance, Eurepgap, the Ethical Trading Initiative, and Marine Stewardship Council. Table 3 shows that the role these standards are perceived to play in trade does not deviate from the overall perception; three out of five are considered to offer opportunities to trade. Eurepgap and MSC are not. In respect of the different indicators the five standards, as a group, are perceived to perform better than the sample's average. All five standards score positive on five out of seven indicators, whereas the average positive score for the entire sample of standards is less than 4. Positive differences can be found for 'facilitating organizational skills', 'resilience to external shocks', and 'access to other chains'. Much better is the perception of the standards' performance in respect of 'additional income generation'. Whereas only 40 percent of the entire sample of standards are perceived to generate additional income for developing country suppliers, four out of five (80 per cent) of the standards relevant to Super de Boer are thought to do so.

5. Conclusion and discussion

The aim of this study is determining the impact of voluntary quality standards in the retail on upgrading and value-added opportunities by developing country suppliers. The effects have been measured through seven different indicators, which were related to four different forms of upgrading. In a second step it is explored whether differences in effects could be detected between different categories of quality standards.

The overall conclusion is that the majority of the 36 standards in the sample are perceived to facilitate trading opportunities for developing country producers, at least for those suppliers that have the capacity to meet the standards' criteria. Certification by the main quality standards increasingly serves as entry ticket to the international markets; to those suppliers who fail meeting the standard's criteria, quality standards impose impregnable trade barriers. The greater part of the standards in the sample is perceived to help improving organizational skills and technical capacity of suppliers in developing countries. They also make suppliers more resilient to external shocks and facilitate their access to alternative value chains. In majority, the standards are not considered to provide additional income for developing country suppliers; they do not change the power asymmetry in the global value chains in favour of suppliers; and they are of little help in making the suppliers identifiable with the end consumer.

Four standards are perceived to perform relatively well: Max Havelaar, Fair Trade Labelling Organization, Nature and More, and the Race to the Top Project. They score positively on six of the seven indicators. Five standards that are used or considered by Super de Boer, including Utz Certified, Rain Forest Alliance, Eurepgap, the Ethical Trading Initiative, and Marine Stewardship Council, are also perceived to perform better than the sample's average, particularly in respect of providing opportunities for additional income to developing country suppliers. Relatively low scores can be found with five standards: Sara Lee's Supplier Selection Guidelines, the Sustainable Consumption Roundtable, and the FAO Code of Conduct on Pesticides score positively on only one indicator, while the UN Guidelines on consumer protection and the UK National Consumer Council show negative scores on all indicators.

The study found interesting differences in effects between the various categories of standards. Standards that are perceived to be a barrier to trade include a relatively high number of standards initiated by inter-governmental bodies and food safety standards. Standards that are generally perceived as trade facilitators are those that are initiated by individual NGOs and those that focus on social issues. This finding may be explained in several ways. The justification for food safety and other consumer protection requirements, both mandatory and voluntary, is often not well understood in exporting developing countries and therefore considered to be protectionist measures. The investment necessary to meet these quality standards does not entail any visible benefits to the supplier; the beneficiaries are located at the very end of the value chain and with the (foreign) consumers. At least four of the standards that are inter-governmental in origin focus on food safety or consumer protection, which may partly explain the relatively negative perception of this standard category in terms of their impact on trade.

The perception of NGO standards and standards with a social focus is much more positive. Both categories also partly overlap. They basically serve niche markets, e.g. organic produce in which premium prices can be obtained. Producers that embark on those value chains must invest in socio-economic and environmental production conditions, but the benefits from these investments are visible and felt in the suppliers region itself. Employees benefit from better labour conditions, local populations experience the advantages of improved water usage, and the firms themselves may profit from a more efficient use of e.g. agro-chemicals. Unlike product safety standards, the criteria of social and environmental standards are likely to positively affect the suppliers' area, which may result in a more positive opinion of the trade affects these categories of standards.

There are also remarkable differences in perceived impact within the various standard categories. In line with our first explorative proposition, standards initiated by NGOs and partnerships are perceived to perform better than standards initiated by others, although NGO standards have higher results than partnership standards. The former show scores higher than average on all seven indicators; the latter on five. The perceived performance of standards initiated by business associations and individual firms stays behind, while the government-initiated standards scores do not exceed the sample mean on any of the indicators.

The second proposition that social and social/environmental standards have a more positive influence on process and product upgrading in developing countries than have private food safety standards is also confirmed. Social and social-environmental standards score higher than the sample mean respectively on six and four of the seven indicators. The scores for environmental and food safety standards is three. Most significant is the support for the third proposition. While generic standards do not exceed the sample mean on any of the indicators, product-specific standards do so six times. These findings imply that retail companies aiming at sustainability improvement of their supply chain chains should first concentrate on standards initiated by NGOs, those with a social focus, and product-specific standards. These types of standards are perceived to facilitate upgrading of suppliers in developing countries best.

The literature study suggests at least four other pathways for retailers to facilitate upgrading of their developing country suppliers through quality standards. First, it is preferable that retailers that core companies invest in their remote suppliers, rather than merely controlling them. Suppliers could be supported in their upgrading processes and, where possible, temporarily be allowed to deviate from the standard. The immediate exclusion on a supplier from the chain because of non-compliance in respect of e.g. labour standards is not desirable in view of the negative consequences of the supplier's employees. Rather, the core firms could invest in suppliers by improving the contracts in tri-partite consultation (buyer, supplier management, supplier workers).

Second, core firms could support inter-chain upgrading of their suppliers. Retail firms have an obvious interest in the product and process upgrading of their suppliers, because this is in their own interest. However, they could also facilitate the inter-chain upgrading to chains that are not competitive. Inter-chain upgrading enhances producers' resilience, particularly when the alternative chains have lower standards, such as the regional chains of emerging local supermarkets.

Third, core firms could support standard certification systems that are specifically designed to suit small and medium enterprises (SMEs). Most standards are directed to relative large individual organizations, but when exported to developing countries they put smaller organizations in a disadvantageous position. Consultancy firms and development organizations have successfully worked out methods that help producer groups to unite for auditing and certification purposes, but acceptance of these certification systems by core firms is not yet obvious.

Fourth, the focus on quality standards as a form of internal value chain governance distracts attention to relevant governance forms external to the chain. This issue is often overlooked in the value chain literature. While core firms in retail chains show their commitment with sustainable supply lines through the voluntary adoption of quality standards, these efforts may be undermined by intentional trade restrictions. For instance, it does not make sense to expand, on the one hand, the variety of Fair Trade cocoa products on the supermarkets shelves and to join international initiatives to make cocoa value chains more sustainable, while on the other hand implicit support is provided to tariff escalation that firmly protect the interests of established cocoa processors in the value chain. Active or proactive CSR strategies require that core firms challenge and eliminate such protective tariff walls that effectively hamper industrial upgrading in developing countries.

Finally, the above conclusions must be understood in the context of the limitations of this study. The benchmarking of the 36 quality standards is based on perceptions of impacts, not on impacts themselves. And although the perceptions are derived from a considerable number of publications (see annex 1), the quality of these written sources differs and exhaustiveness cannot be claimed. Furthermore, in several cases the effects of standards as perceived in the literature were not clear cut and required interpretation by the researchers. This may have caused bias in the results. To validate the findings of this study further research is required that includes non-English language publications, expert opinions, and interviews with the actors in the global retail value chains particularly in developing countries.

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Annex 1 Sources of the literature survey quality standard impacts

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