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*A multiple case study in Ethiopia*

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**Working Paper Series**

**March 2012**

**Working Paper 033**

## Colophon

The Partnerships Resource Centre: Working Paper Series  
ISSN 2211-7318

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Internet: [www.partnershipsresourcecentre.org](http://www.partnershipsresourcecentre.org)

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# Key conditions for successful value chain partnerships:

## A multiple case study in Ethiopia

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### **Abstract**

This paper explores the black box of value chain partnerships, by showing how these partnerships can facilitate institutional change that is needed to include smallholder producers and small-and medium sized enterprises into (global) food value chains. It draws on agricultural value chain literature, collaboration literature, and institutional theory to gain insight into the relationship between the partnerships' inner dynamics on the one hand, and the institutional changes the partnership facilitates in key areas of the business environment on the other. The study comprises a multiple case study of four multi-stakeholder value chain partnerships in honey, dairy, oilseeds and pineapple in Ethiopia. Sources of evidence include program documents, minutes of 66 meetings, and in-depth interviews with 67 key stakeholders. The study identifies four key conditions for fruitful collaboration: trust building, societal embeddedness, strong private sector leadership, and stakeholder involvement. Especially the latter condition proved to be important. Existing institutional structures and vested interests defended by individual stakeholders that remain outside the partnership may significantly hinder the institutional change advanced by value chain partnerships.

## Introduction

Multi-stakeholder partnerships are increasingly recognized by researchers and practitioners as promising mechanisms for including smallholder producers in developing countries in (global) value chains. Multi-stakeholder partnerships can be defined as voluntary, collaborative arrangements between actors from two or more domains of society, i.e. state, market and/or civil society, which have an institutionalized, yet non-hierarchical structure and strive for a sustainability goal (Glasbergen et al., 2007). The typical goal of multi-stakeholder value chain partnerships is the inclusion of smallholders and small and medium-sized enterprises (SMEs) into commercial chains. Such collaborative arrangements between private and public actors are increasingly popular to overcome market or government failures, and to increase efficiency in the value chain, because partners can pool their resources, knowledge and capabilities (Kolk et al., 2008), and can offer advantages in terms of increased flexibility, productivity, cost reduction and innovations (Jenkins, 2007). The underlying assumption is that by pooling these resources, value chain partnerships can generate results which they could not have achieved on an individual basis, a so called ‘collaborative advantage’ (Huxham and Vangen, 2000; Kolk et al., 2008).

Value chain partnerships typically aim at improving the production and delivery of products and services of small scale producers (O'Rourke, 2006; Glasbergen et al., 2007; Bäckstrand, 2006). They can construct new institutional arrangements in order to address important technological and institutional gaps that hinder smallholder producers and SMEs from producing for and transacting into (global) supply or value chains. In light of the importance of agricultural activities for the livelihoods of millions of people in rural areas, one poverty-alleviating growth strategy is improving access to formal, commercial markets (Bitzer et al., 2010; Van Wijk and Kwakkenbos, 2012).

An increasing number of non-governmental organizations (NGOs) and private enterprises are participating in value chain partnerships<sup>1</sup>, and such cross-sector collaborative arrangements have made a remarkable breakthrough in the development discourse. However, knowledge on their effects and actual impact remains scarce; the understanding of how, when, and why partnerships work is limited in current partnership studies (Jørgensen, 2006; Witte and Reinicke, 2005; Idemudia, 2009). There are ongoing academic debates on what constitutes a partnership, whether and how we can empirically assess the potential, limitations, and actual impacts of (value chain) partnerships and what are their likely conditions for success (see for example Idemudia, 2009; Lund-Thomsen, 2009, Rein and Scott, 2009). But assessing partnerships is complicated. There is a wide variety of existing types of partnerships, it takes a long time before successful impact can be achieved, there are different perspectives on what ‘success’ means, partnership interventions may be complex and variable, and they are found in very different contexts/sectors (Boydell, 2007).

For value chain partnerships specifically, little is known about its set-up and characteristics required to advance the inclusion of smallholder producers and SMEs in value chains. It is not clear to what extent value chain partnerships deal with the institutional constraints faced by smallholder producers and SMEs and how the output of partnerships relates to input-oriented aspects of partnerships (Bitzer et al., 2010).

This paper therefore relates output to input aspects of partnerships. We address the conditions that need to be met in order for value chain partnerships to have positive effects on inclusion of smallholder producers and SMEs into commercial chains. We first review collaboration and multi-stakeholder partnerships literature for conditions of fruitful partnership arrangements. Although the literature on multi-stakeholder engagements is limited and mainly refers to water partnerships (i.e. Warner, 2006), we identified a number of “critical success factors” (Pfisterer, 2011), that are a necessary but not sufficient condition for successful collaboration within value chain partnerships. Secondly, we determine ‘positive’ effects in respect of inclusive value chains. The focus is on economy-related effects since inclusion into commercial chains inherently assumes a confrontation with the logic of the market. Operating under market conditions requires smallholder producers and SMEs to upgrade their farms and business to become more competitive. The most prominent role for value chain partnerships is therefore to promote institutional changes to improve the conditions for such upgrading.

The findings from the literature review are used to analyze the data collected in a multiple case study of four multi-stakeholder platforms (MSPs) that were initiated to develop and improve four commercial food value chains in Ethiopia. These partnership arrangements comprise a series of dialogue meetings in which stakeholders participate from farm, business, NGOs and government sectors. They were launched by a foreign NGO in an effort to improve the access to markets for small and medium sized agribusiness players in the honey, dairy, oilseeds and pineapple chains. Our approach is to highlight the complex relation between the MSPs’ internal configuration and its effects on facilitating inclusion in the value chains.

This paper proceeds as follows. The next section provides a theoretical elaboration on the role of value chain partnership arrangements in promoting smallholder inclusion in value chains. The third section explains the methodology of the multiple case study and is followed by a description of the four cases. Then we present the empirical findings. First, we analyze the institutional changes found in the business environment of the four value chains. Second we focus on the inner dynamics of the four MSPs, emphasizing four conditions for fruitful collaboration that were found most important in the case studies: trust-building, private sector leadership, societal embeddedness, and stakeholder involvement. We conclude with a discussion on these four conditions.

### Value chain partnership rationale: Lowering barriers to upgrading

Any farm or firm that wants to adjust itself to the ever changing market requirements needs to upgrade its products, production processes or organisation. The concept of ‘upgrading’ refers to a farm or firm’s ability to acquire new technologies or management techniques to increase its competitiveness and resilience, and eventually improve its power position in the value chain (Bair, 2005; Giuliani et al., 2005). Especially in developing countries smallholder producers and SMEs have to cope with an institutional environment that is not conducive to upgrading of small, often informal players in productive and service sectors. Value chain partnerships, varying from cross-sector arrangements between two or three partners to cross-sector platforms involving dozens or even hundreds of stakeholders, therefore particularly address institutional barriers to upgrading by value chain actors. Only by investing in technical and social innovations can smallholder producers and SMEs enter, maintain, or improve their position in value chains. Such improvement is a necessary, though not a sufficient condition to any sustainable improvement in the livelihoods of rural populations (Van Wijk and Kwakkenbos, 2012).

The most important institutional challenges to inclusion in commercial value chains concern those formal rules, inter-organizational arrangements, and informal customs that prevent smallholder producers and SMEs from having access to knowledge, credit, markets, and professional organizations (Bitzer et al., 2010; Van Wijk and Kwakkenbos, 2012).

First of all, smallholder producers and SMEs need to get organized to develop capacity and to be able of supplying volumes, quality, and of guaranteeing regular supply. In general, *access to organizations* facilitates risk sharing, the pooling of resources, enable collective learning, and developing market power (KIT et al., 2006). The lack of *access to knowledge* often hampers agri-food enterprises to adopt new practices that build trust and confidence of buyers in the quality and safety assurance mechanisms for their produce (Henson and Jaffee, 2006; Garcia Martinez and Poole, 2004). While *access to markets* is considered critical to growth in developing countries (OECD, 2006; World Bank, 2008), the majority of smallholder producers and SMEs face huge barriers to link themselves to national and global markets. The high volatility of commodity markets hinders producers to invest in agricultural production. A more stable market for suppliers through buyer commitment and price stability would motivate smallholder producers and SMEs to invest in production capacity and quality improvement (Gibbon and Ponte, 2005). Finally, lack of *access to capital or credit* is a major constraint for many smallholders (Altenburg, 2007; Kaplinsky and Morris, 2001). Broader access to financial services would expand their opportunities for technology adoption and resource allocation (World Bank, 2008).

### Factors that promote multi-stakeholder collaboration

The academic partnership and collaboration literature reveals a number of critical success factors for multi-stakeholder collaboration within value chain partnerships, particularly when dealing with more ambitious and complex issues (Table 1).

The value of value chain partnerships lies in the potential to create *win-win situations* if all stakeholders are willing to contribute to the achievement of goals (Bitzer et al., 2010). Since interests of stakeholders in multi-actor collaborations often differ, *(formalized) goal alignment* forms an important part of the collaboration process (Kolk et al., 2008).

In a four-year study of the collaborative activities of a small NGO in Palestine, Lawrence et al. (2002) found that inter-organizational collaboration leads to the development of new institutions. Collaborations that are both *highly embedded* and have *highly involved partners*, are the most likely to generate “proto-institutions”: new rules, technologies and practices that arise and are diffused beyond the boundaries of the specific value chain MSP contexts, and that are adopted by other organizations in the field. These proto-institutions “represent important first steps in the process of institution creation, thus potentially forming the basis for broader, field-level change” (Lawrence et al. 2002, p. 283). They may become new institutions if they diffuse sufficiently. Broad participation of all

stakeholders is therefore crucial in a value chain partnership, as actors from different societal sectors have different expertise and can thus assume different roles that can complement each other (Bitzer et al., 2010).

TABLE 1

Critical success factors within value chain partnerships

Critical success factors
Win-win situation
Formalized goal alignment
Stakeholder embeddedness
Stakeholder involvement
Risk- and resource sharing
Shared (decision making) processes
Formalized governance structures
Clear roles and contributions
Trust building
Transparency

Sources: Ansell and Gash, 2008; Austin, 2000 and 2007; Berger et al. 2004; Bitzer et al., 2010; Kolk et al., 2008; Lawrence et al., 2002; Offe, 1999.

Additionally, collaboration presents the highest strategic level of engagement and implies that the partners *share risks, resources and rewards* (Austin, 2007). This also entails a *formalization of governance structures*, including contractual arrangements to specify objectives, activities, *roles and responsibilities* (Bitzer et al., 2010). Ansell and Gash (2008) imposed the condition that non-state stakeholders in public-private collaborations must be directly *engaged in decision making* in order to have real responsibility in policy-outcomes.

*Trust building* between partners' representatives is essential in partnerships, next to better understanding and enhanced relationships (Austin, 2000). On the contrary, distrust – “the perceived and behaviourally manifested assessment of great risks that result from interaction with others” (Offe, 1999) - can disrupt interactions between partners as a result of covert behaviour, opportunism and communication breakdowns (Berger et al., 2004). *Transparency, prosperity and control* are breeders of trust and decrease risk (Offe, 1999).

An institutional approach on value chain partnerships allows us to link their internal dynamics with external effects. The overall assumption underlying this relationship is that the more value chain partnerships meet the key conditions for fruitful collaboration, the higher the likelihood that they achieve institutional change, i.e. mitigate or remove a number of institutional barriers to upgrading for small-scale value chain actors.

## Methodology

The study is designed as a comparative case study research project to examine the effects of four value chain multi-stakeholder platforms that aim to improve market access for smallholder producers and SMEs to the honey, dairy, oilseeds, and pineapple value chains in Ethiopia. The MSPs were established by a foreign development organization in the Oromia and the Southern Nations, Nationalities, and People's Regional (SNNPR) States of Ethiopia, in 2005. The four cases enable a comparison of how such value chain interventions address institutional barriers to value chain inclusion. Data for the study was collected in the period August to November 2010.

Following Yin (2009) multiple sources of evidence were collected, including the MSP strategy documents, the minutes and complementary documents of 66 meetings, and in-depth interviews with key stakeholders. We selected candidates in each value chain from the participant lists of five value chain MSP meetings spread over the MSP's history (beginning, end, and middle stage), who had played key roles in the value chains at issue. Several stakeholders were selected because they were highly critical of, or had left the MSP. A final sample of 67 interviewees was drawn in discussions with the NGO who had initiated the MSPs and who facilitated the multiple case study.

Four databases were constructed to calculate the degree of participation of individual organizations in value chain MSP meetings. Type and subtype of each organization were classified<sup>1</sup>. These quantitative network databases allowed us to identify; (a) leading organizations in the meetings, (b) societal sector representation, and (c) participant turnover rates, data that was used to triangulate our findings.

All interviews were transcribed verbatim and data were analyzed with the qualitative analysis software program MAXQDA. Outcomes were cross-checked, compared to and extended with information provided by several key informants to ensure triangulation. Interviewees were explicitly asked for their permission to be (anonymously) cited in the study. Finally, inter-rater agreement among the three researchers was assessed to improve reliability. We separately assessed the performance of the four multi-stakeholder partnerships and calculated these scores into a mean score for each of the institutional dimensions.

With respect to the ten factors that promote multi-stakeholder collaboration, we concentrate the analysis on four key conditions whose presence differed most across the four cases studies: trust building, societal embeddedness, private sector leadership, and stakeholder involvement. The other factors are left out, either because they proved to be irrelevant in the cases, because analysis was no option, or because the degree of their presence was equal across the four cases. For example, the factor 'risk sharing' was not relevant because resources are mainly brought in by the NGO; analyzing the factor 'clear roles and contributions' was not an option due to the high number of participating organizations (437) and the high rotation of members and organizations; and whereas the factor 'formalization of governance structures' is important, the decision making processes were found to be equal in all four MSPs.

Our approach has a few limitations. The inherent problem of evaluation research is how to attribute changes observed to the intervention, in this case the value chain multi-stakeholder platforms. This problem was prominent since the value chain MSP approach was part of the far larger development program of the NGO. Due to this 'attribution problem' it is difficult to determine a clear causal relationship between the MSPs and their effects. Second, during the field work the researchers operated in close collaboration with the development NGO. Though this substantially facilitated logistics and minimized non-response, such embeddedness holds the risk that organizations might shy away from reflecting critically on the value chain MSPs as they fear the continuity of their good relationship with the development organization. To avoid bias, stakeholders that had exited the MSPs as a result of a conflict or those unwilling to participate were explicitly incorporated in the interview sample. Furthermore, the researchers constructed a list of relevant stakeholders in advance to ensure independent sampling.

### **The cases: Four multi-stakeholder value chain platforms**

As in many African countries, agricultural marketing systems in Ethiopia are generally weak and inefficient. High transaction risks and costs, asymmetric or absent market information, and commitment failures are among the main problems in African market institutions. Furthermore, there is no effective transport network, imported food items (i.e. edible oils or milk powder) distort local markets, and processing of agricultural produce is poorly developed. Although the country is highly dependent on the agricultural sector, very little added value is being created in food production. Linkages between private sector actors are often weak due to vast geographical distances, vulnerable communication systems and the mutual lack of trust and confidence. Moreover, cross-sector linkages are often even weaker due to historical divides that exist between the government and the business sector, as well as between these both sectors on the one hand and civil society organizations on the other. Although there is substantial market potential for all four commodities under study, value chain stakeholders perceive a multitude of constraints to sector development.

A foreign development organization responded to these constraints with a holistic value chain approach program<sup>2</sup>, including the establishment of four value chain multi-stakeholder platforms (Table 2). In total 437 organizations participated in at least one of the 66 meetings that were organized in the period 2005-2010. The four value chain multi-stakeholder platforms served as new, horizontal platforms where stakeholders from different societal sectors in the Ethiopian four value chains could meet and discuss in a rather open atmosphere on pressing issues in their sectors. The value chain MSPs enabled the creation of linkages between organizations that did not exchange information before the start of the meetings. Private sector actors, also from remote areas, were enabled to meet, establish contracts, exchange knowledge and learn from one another in, what interviewees almost unanimously described as, a rather open atmosphere.

TABLE 2

Four value chain MSPs from 2005-2010

	Background	Meeting details <sup>1</sup>	Key participants <sup>2</sup>	Ratio (%)
<b>Honey</b>	The world market for honey is considerable, and demand is on the increase (Bell, 2009; Bradbear, 2009; Phipps, 2010). Ethiopia has a substantial potential for apiculture development, with beekeeping being a traditional important off-farm activity for an estimated 1.7 million rural households. Ethiopia is considered as the African county with the largest amount of bee colonies and has the comparative advantage in terms of potential to market organic honey, specialty honey and fair-trade labeled honey and beeswax products. Nevertheless, Ethiopia's main market for honey (90%) is a traditional honey wine, called <i>tej</i> .	127 organizations in 18 meetings  Meeting frequency: four times a year.	Input suppliers, beekeepers, associations, honey processing companies, government agencies, research centres, microfinance institutes, banks, consultants, ministries, chambers of commerce, NGOs, BDS providers	Private: 56 Public: 19 Civil Society: 24 Unknown: 1
<b>Dairy</b>	Ethiopia has considerable potential for dairy production as it is believed to have the largest livestock population in Africa with an estimated total cattle population of 50.8 million, of which 8.5 million are dairy cows. Nonetheless the country is a dairy importer. Between 2005 and 2009 import of milk and cream almost doubled to 84 million Birr (Euro 3.7 million) (FAO, 2009). The Ethiopian dairy sector is characterized by small farmers, weak milk cooperatives and very few private small and large-scale processors. Two private processing firms (one formerly state-owned that is recently privatized) dominate the market both as buyer and as seller.	125 organizations in 18 meetings.  Meeting frequency: four times a year.	Input suppliers, dairy producers and cooperatives, associations, dairy processors, collection centres, government agencies, microfinance institutes, banks, consultants, ministries, chambers of commerce, NGOs, BDS providers	Private: 58 Public: 18 Civil Society: 14 Unknown: 10

<sup>1</sup> Based on organizations participating in the meetings from September 2005- June 2010. By the end of 2010, already 19 meetings took place for the honey, oil seeds and dairy value chain MSPs. The pineapple MSP counted 14 meetings by the end of 2010. Nevertheless, the quantitative network data were based on fewer meetings due to the participation lists in the meeting minutes that were made available to the researchers at start of the research project in June 2010.

<sup>2</sup> The list is not exhaustive.

<b>Oilseeds</b>	Edible oil and oil crops are among the widely traded commodities in the world. Oil crops are the third major crops grown in Ethiopia with an estimated total cropped area of 740,000 hectares involving more than three million smallholder farmers. Production is characterized by labour intensive, low-input and rain-fed cultivation that results in low yields. There is however high potential for (organic) and sustainable oilseeds production, through improved farm practices and the existence of large areas of uncultivated and fertile lands. Demand opportunities for oilseeds export are not fully exploited yet because of inefficient marketing, improper cleaning and sometimes poor contract discipline (Wijnands et al., 2007). Nor have domestic demands been sufficiently met.	101 organizations in 17 meetings.  Meeting frequency: four times a year.	Input suppliers, oilseeds producers and cooperatives, associations, exporters, processing companies, government agencies, microfinance institutes, banks, research centres, consultants, ministries, chambers of commerce, NGOs, BDS providers	Private: 60 Public: 18 Civil Society: 21 Unknown: 0
<b>Pineapple</b>	The market for fresh pineapples is one of the fastest growing fruit and vegetable markets in Europe and the United States (Pay, 2009). Moreover, there is a considerable demand for processed pineapple products in European and Middle-East Markets. Ethiopia is not yet part of the list of main non-European suppliers. Ethiopian small farmers are accustomed to work with pineapples as a cash crop in a mixed farming system for decades. The use of fertilizer is nearly absent and the pineapples produced are organic. Major challenges in the pineapple value chains are the high transaction risks of pineapple growing (costs, volumes, information) resulting in limited added value and oligopolistic behaviour in the principal wholesale market.	80 organizations in 13 meetings.  Meeting frequency: initially bi-annually, but from May 2007 four times a year.	Input suppliers, pineapple producers and cooperatives, wholesalers, exporters, associations, processors, government agencies, research centres, universities, microfinance institutes, banks, consultants, ministries, chambers of commerce, NGOs, BDS providers	Private: 59 Public: 25 Civil Society: 16 Unknown: 0

## Facilitating institutional change in the value chain

To what extent have the value chain MSPs generated effects that improved the conditions for upgrading for smallholder producers and SMEs in the four value chains? The findings suggest that all value chain MSPs have played a role in creating opportunities for value chain actors to become part of professional associations, acquire knowledge and technology, opportunities to stabilize and/or access (new) markets, but to a variable degree.

In all value chain MSPs stakeholders' access to new organizations improved. The very function of the MSP meetings has been serving as a platform where hundreds of value chain stakeholder could meet, learn, share, and collectively undertake actions. Furthermore, a few additional professional organisations were established in the meetings creating opportunities for new memberships. However, the MSPs differ in their success of facilitating members' access to new professional organisations. Only the honey MSP facilitated access to new professional organisations -formed externally from the honey MSP- for honey stakeholders. In the pineapple sector the situation differs due to the absence of relevant professional organisations.

All value chain MSPs contributed largely to value chains stakeholders' access to knowledge (technical, market, organisational) by means of information exchange and trainings facilitated through the MSPs. Increased knowledge on production agronomy, new varieties, quality based pricing systems, and diversification of products improved awareness on quality issues and the value of the products.



Picture: dairy product diversification: cheese products

The value chain MSPs have facilitated access to (new) markets by opening export markets (honey), generating market information and -exchange visits, promoting contractual agreements, quality based pricing systems, and increasing quality awareness and valuation of the products. "Beekeepers were initially not aware of the value of beeswax. They even threw it away in the production process. From the meetings they learned to appreciate its value" (cooperative union member). Moreover, it puts pressure on the government to develop mandatory quality standards for the sectors. Another significant contribution is that the value chain MSPs stimulated the establishment of business to business (B2B) relations. The interviewees and meeting minutes indicated that service providers have met their clients in the meetings, laboratories and research centres provided input materials to investors, and processing companies are negotiating on supply with producer organisations. Bilateral sessions organized in the meetings were instrumental in uniting actors with similar business interests. "The leading processing company is currently buying modern beehives from a modern technology and equipment manufacturing centre whom the company representatives meet in the honey MSP meeting" (lead advisor honey value chain, NGO).

Particularly in the Ethiopian dairy and pineapple chains oligopsonic<sup>3</sup> market structures exist where a small group of buyers dominates the market and hence hinder the value chain MSPs to facilitate the upgrading in the sectors. For instance, in the dairy market, the two main processing companies are believed to set price at unfair low levels and to obstruct the possibility of price negotiations. The main problem in the pineapple sector is the dominance of three to five wholesalers that distort the fresh fruit pineapple market. "They dominate the single low-quality fresh fruit pineapple market, they bypass cooperatives that represent farmers' interests and directly

purchase pineapples for cheap prices from cash constraint farmers in the rural areas” (manager, ecological fruits processing company). Therefore, it remains a challenge to make local markets more predictable for smallholder producers and SMEs. Nevertheless, the value chain MSPs have been able to attract several investors, wholesalers, and processing companies to the meetings who have the potential to reduce oligopsonic market structures.

In general, access to affordable capital or credit for smallholders and small and medium sized enterprises remained a major issue of concern. Several banks and micro finance institutes did attend the MSP meetings, and the MSPs have improved the creditworthiness of several participating organisations. Particularly the honey MSP was able to generate some capital from within the value chain. However, the majority of interviewees said the value chain MSPs did not positively affect the willingness of banks or microfinance institutes in Ethiopia to lend to value chain actors. So far, “the credits have been untouchable” (vice chair, honey beekeepers association).

In sum, the MSPs have been able to bring together a wide variety of Ethiopian stakeholders to discuss the performance of four agricultural sectors and to address the barriers that hinder individual actors to upgrade their business. Whereas this is an achievement in itself, interviewees pointed to lack of access to capital or credit services as a major bottleneck to the development of their sector. Although participants received information on new technologies, there are often no means to access these expensive technologies. Access to markets was obstructed by dominance of existing market players in all value chain MSPs except for the rather new honey value chain. Particularly the honey MSP has managed to provide access to new international markets. In 2008, the first high quality Ethiopian table honey was exported to the European market, reaching an export value of US\$ 1,9 million for honey, and US\$1,6 million for beeswax in the production year 2009/2010 (*pers. comm.* Ethiopian Ministry of Trade and Industry).

### Key conditions for successful value chain partnerships

Most of the factors for collaboration played in one way or the other a role in the organization of the Ethiopian MSPs. However, the presence of four inter-related key conditions for collaboration differed most across the MSPs and they are therefore assumed to have the greatest explanatory power in respect of the differences in effects of the MSPs.

#### *Condition 1: Trust building among key players*

Trust building seems to be key in creating a ‘common ground’ among chain stakeholders. MSPs offer stakeholders - who may not have exchanged information before - the opportunity to meet, experience interaction with one another, and develop a sense of trust as a result. Interviewees, particularly in the honey and pineapple chains appreciated this role of the MSPs. “Small- and medium sized honey processing companies are currently more eager to collaborate as trust developed as a result of presentations of company profiles and -achievements in the meetings” (apiculture researcher, bee research centre). MSP facilitators deliberately encouraged stakeholders in the meetings to have bilateral discussions and to exchange contact addresses during lunch and coffee breaks. More than in the other value chain MSPs the agenda of the pineapple MSP was directed towards ‘the action groups or action approach’ and ‘(bilateral) grouping’ in an effort to actively engage stakeholders and to strengthen the dialogue and trust relations between the different chain actors, supporters, influencers and facilitators.



Picture: Facilitating trust building in the pineapple MSP, Hawassa (Ethiopia)

“Without the pineapple MSP we would never have had these open discussions on delicate subjects such as the monopolistic behaviour of wholesalers in Addis Ababa’s main market. Moreover, our company gains more confidence and trust in producer cooperatives as we informally exchange our views on difficulties from each side” (manager, ecological fruits processing company).

That a lack of trust development can have the opposite effect proved the dairy MSP, where stakeholders said it was difficult to identify common goals and hardly operate on shared goals (i.e. improve quality of dairy products), because dairy producers and processors distrust each other. This has obstructed the effectiveness of the goal setting process throughout the five years of the dairy MSP. Trust was especially difficult to build due to the typical characteristics of the dairy product and the Ethiopian market. The limited life span of dairy products makes producers very dependent on buyers and gives easily rise to frictions between chain actors. And the dairy fasting seasons in Ethiopia, in combination with a lack of sufficient cooling devices, put even more pressure on the producer-processor relationships. Moreover, the Ethiopian dairy market is dominated by two processing firms with vested interests for whom the benefits of the dairy MSP were not clear.

The dairy MSP tried to develop the dairy sector by enhancing market competition. To this end, new, emerging dairy processing companies were given technical and financial support through the MSP. The MSP also established the Ethiopian dairy producers *and* processors association (EMPPA). Unfortunately, low confidence and distrust between dairy producers and processors has persisted, and the two main dairy processing companies in Ethiopia refused to become a member of the EMPPA as they mistrust and did not acknowledge the association:

“The association has no influence on government policies, and serves only a symbolic function. Therefore, it cannot represent the processors’ concerns with quality standards and package equipment, two problems that can be particularly addressed through the government” (general manager, dairy processing company).

It seems that those MSPs that could build trust among key chain actors generated more effects conducive to smallholder inclusion than the MSPs where mutual trust remained limited. The exchange of contact addresses and information in the value chain MSPs had more than once resulted in direct transactions between chain actors, for instance between producers and processors in the honey value chain. Furthermore, “as a result of interactions in the honey MSP the governmental body perceives one of the honey processing companies as more trustworthy, and grants the permission for land - a sensitive issue in Ethiopia - more easily” (private consultant quality and safety standards).

#### *Condition 2: Private sector leadership*

The presence of a private sector leader proved to be very important for the success of the MSP in honey and, to a lesser extent, in oilseeds. The honey MSP was chaired by the president of the major honey processing firm that had the authority within the sector to operate as a *primus inter pares*. He owned an exemplary, blooming honey business that enjoyed a 50 % production increase and resulted in 150 % producer income increase in a couple of years as a result of trainings he provided to beekeepers. He also proved to be a pro-active person, with a vision of necessary changes in the entire honey chain. The broad support he received from honey stakeholders was illustrated in the positions he acquired as president of a leading honey producer and exporter association (EHBPEA), and of the Ethiopian Apiculture Board. The combination of these positions added a degree of verticality to the otherwise horizontally organised MSP that facilitated decision-making and implementation in the MSP and improved the local ownership of the MSP.

“It is mainly the strength of the honey MSP leader, as a diplomat and as a person with genuine interest, that has lead to concrete cooperation with the government, opening access to international export markets, and an increase in ministerial attention to the apiculture sector as a whole” (program coordinator, Ethiopian NGO).

The managing director of a Ethiopian oilseeds processing company and former president of a sector-wide oilseeds processors and exporters association (EPOSPEA) was elected as the oilseeds MSP chairman during the first meeting. Although he is committed and has a clear vision on the direction of the development of the oilseeds sector, he could not develop legitimate leadership as he lacked support from oilseeds associations and MSP participants. In his opinion, “neither MSP members are highly committed to carry out assigned responsibilities effectively, nor are the exporters’ and oil millers’ associations strong and active enough to support the MSP” (managing director, oilseeds processing company).

The pineapple and dairy MSPs have continuously struggled to find a widely accepted MSP private sector leader. In dairy this situation was related to the divide between producers and processors and the opposition to the MSP by the dominant dairy processors. Although she owned a small but blooming dairy business, the elected MSP chair lacked sufficient constituency across the dairy chain to fulfil the role of leading the entire industry sector towards modernization. A similar situation existed in the pineapple MSP, where no private sector could be found to change the pineapple value chain. Much of this was related to what can be considered as the main challenge of the pineapple MSP: the market dominance by a small number of wholesalers. The subsequent pineapple MSP chairs either withdrew from their position as a result of their frustration with this market situation and/or lacked unanimous support of the other members. The pineapple MSP also did not succeed to establish a new sector association that could take over the role of the MSP after it phased out its activities in August 2011.

In short, pro-active leadership from a strong and private sector chain actor was found to have an added value in the dynamics and decision making power of the MSPs in honey, and to a lesser extent, in oilseeds. But the pineapple and dairy MSPs suffered from a lack of stable and committed leadership, provoked by vested interests of dominant stakeholders. This hampered direction and progression in these MSPs.

### *Condition 3: Embeddedness in society*

We examined to what extent the four value chain MSPs were embedded in societal networks that would give momentum to the proposed institutional changes agreed upon in the MSPs. Only the honey MSP proved to be a highly embedded multi-stakeholder network involving a high degree of representation of all three sectors (civil society, market and the state). The honey MSP interviewees considered the participants as a rather complete and good quality representation of society.

Embeddedness with the private sector was found in all four MSPs. The majority of the participants in the value chain MSPs are from the private sector (Table 2), which would increase chances that changes agreed upon in the MSP would be acceptable for business. But private sector organisations vary considerably in their capacity and quality. Leading private sector organisations in the honey MSP are far better capacitated than those of –for example– the dairy MSP. Leading organisations of the latter lack embeddedness in a strong private sector: businesses are generally weak in production and collaboration capacity and those businesses that are considered strong are not participating in the dairy MSP. In the honey MSP this situation is reversed: honey MSP stakeholders are strongly backed by the major private honey processing- and exporting companies, as well as the two central apiculture business associations in Ethiopia.

The MSPs' embeddedness within the government was rather shallow. Interviewees from all four MSPs explicitly deplored the absence of key governmental decision representatives in the meetings: "I appreciate the learning possibilities from other stakeholders in the value chain; however, they have no authority to make the necessary decisions" (pineapple investor). None of the four sectors were initially clearly on the government's radar screen. But during the five-year period of their existence, some value chain MSPs managed more than others to attract more attention from Ethiopian authorities. The government's support concerned export products, which were honey and oilseeds rather than pineapple and dairy. Export issues remained more relevant than the entire value chain. "If you go for export, you know the government will support you" (Head of the Agro-Processing Industry Development Department, Ministry of Trade and Industry). Ministerial interest and support in the honey MSP grew significantly with the ambitious plans and success to open up international markets through EU Third Country registration of the Ethiopian honey and beeswax products. A public private partnership on oilseeds (PPPO) initiated in the oilseeds MSP improved government attention to the oilseeds sector as well. Both the Ministries of Agriculture and Trade are participating in this forum.

The pineapple MSP was the only one that enjoyed a strong governmental representation, but this seemed to have backfired. There was a high representation of the public sector (25 % of all participants) in the pineapple MSP, more than in other MSPs (Table 2). This relative deep embeddedness within the government made the pineapple MSP over-dependent from certain agencies and, according to interviewees, slowed down change and progress in business environments. In the end MSP decisions had to pass the governmental hierarchy first before they could be implemented. But this government "did not carry out its responsibilities" (pineapple investor) as regards to prioritized issues by pineapple value chain stakeholders (i.e. road construction) and offered "non-reliable public services" (foreign development NGO).

In the dairy MSP, government commitment was initially limited to their participating in the MSP meetings. The government had embarked on a liberalization policy, which did not concerted well with a proactive significant restructuring of the Ethiopian dairy sector that was actually required to develop a viable value chain for dairy. In combination with Ethiopian dairy products considered insignificant for export, the dairy MSP was not a priority to the Ethiopian government.

Embeddedness within civil society was limited to a number of development NGOs that acted as value chain facilitators. International and local civil society organisations played a large role in initiating and facilitating the value chain MSPs, by bringing in their knowledge, resources and networks. More specifically, they contributed to enhanced tie formation among the stakeholders by organising regular stakeholder meetings. Table 2 shows that civil society representation is highest honey and oilseeds, followed by dairy and pineapple contributing to their opportunities for lowering the barriers to upgrading.

In sum, our interviewees and quantitative analysis of leading organisations in the value chain MSP give the impression that sector representation arrangements and relations were most fruitful in the honey MSP, followed by the oilseeds and pineapple MSPs, and finally the dairy MSP. The numerous B2B relations established in the meetings resulted in increased multidirectional information flows and transfer of information and contacts to the benefit of the members, and enhanced the general networking opportunities for them.

#### *Condition 4: Stakeholder involvement*

Stakeholder involvement, investigated through attendance and active participation in MSP meetings, varied considerably across the four MSPs. It was highest in the honey MSP, due to a highly committed core group of participants that included the main private honey processing company in the country and the Ministry of Agriculture. The MSP generated several successful sub-organisations. The Quality Working Group managed to add Ethiopia to the international list of honey producing countries with approved honey residue monitoring plans, which allowed exportation of Ethiopian honey to the international market. A second organization established by the MSP is the Ethiopian Apiculture Board (EAB), which proved itself successful in taking over the sector-wide facilitating role of the NGO that initiated the honey MSP. These new organisations enlarged the network in the apiculture sector through which the main honey stakeholders could collaborate besides the MSP.

The dairy MSP had to cope with a relatively low stakeholder involvement. One of the reasons was a general lack of confidence in the MSP's activities due to the absence of proactive government involvement.

‘There is no policy framework that guides and supports the dairy sector development. There is no attention at all to the sector. This is mainly due to the fact that the dairy sector is not considered as an important commercial activity; it is considered as a secondary economic activity into which individuals engage to supplement household consumption or as a ‘hobby’. Consequently, the sector suffers from absent quality standards, shortage of animal feed and veterinary services’ (general manager, dairy processing company).

Other major reasons for low stakeholder involvement are the distrust and the low confidence between dairy producers on the one hand and the dairy processors on the other. The country's dominant dairy processing companies were reluctant to participate in the MSP, among other things because the multi-stakeholder platform supported the emergence of new processors - potential competitors - in an effort to increase competition in the sector.

In the pineapple MSP, participants are very active in building mutual linkages during the meetings and in specific committees, but outside the meeting room their commitment is relatively low. This attitude is related to the persistence of the existing, oligopsonic market structure that hinders cooperative behaviour among value chain actors. The involvement and investment of private pineapple investors is hindered due to bad access roads and insecure markets. Those who ultimately succeeded in securing land for pineapple production were “discouraged by insufficient supply of seedlings and absence of water” (vice manager, fruit export company).

Also in the oilseeds MSP stakeholder involvement is modest. A highly committed core group to ‘steer the wheel’ was absent, and the oilseed MSP showed the highest percentage of rotating and exiting<sup>4</sup> organisations (71.2 %). This rotating group “lacks knowledge of the previous meetings and questions are repeated every meeting” (local capacity builder, NGO). “The oilseeds MSP cannot be successful with participants who attend the MSP meetings only once” (general manager, oilseeds enterprise). The high turnover of participants in the oilseeds MSP apparently triggered disruptions that negatively impacted building up a trusted and shared knowledge

base. Moreover, committed members experienced disincentives to exert extra efforts due to low stakeholder involvement of other members.

We found that stakeholder involvement of all key value chain actors in value chain partnerships is one of the main indicators of its performance. Obstructing, non-participating and highly rotating stakeholders can discourage other (willing) stakeholders to live up agreements and changes that are promoted in the value chain MSPs. Table 3 summarizes the four key conditions for successful value chain MSPs.

TABLE 3

Key conditions for successful value chain MSPs

Stakeholder involvement
Societal embeddedness
Strong private sector leadership
Trust building

## Conclusion

This paper sheds light on how value chain partnerships can facilitate institutional change that is needed for a process of inclusion of small producers and small-and medium sized enterprises in value chains. It explores the inner dynamics of four value chain partnerships – in the form of multi-stakeholder platforms (MSPs) - to assess their effects on institutional change processes in the honey, dairy, pineapple and oilseeds sectors in Ethiopia. Our approach has been to relate output to input aspects of value chain partnerships, by investigating key conditions for multi-stakeholder collaboration that need to be met in order for the partnerships to have positive effects on inclusion of smallholders and SMEs into commercial chains. To this end we first defined the ‘positive effects’ of value chain partnerships in terms of institutional changes that make the business environment more conducive to upgrading of small scale chain actors. We found that the honey MSP was most successful in this respect, because it managed to provide chain actors with access to relevant technological and market information, established a new and widely supported professional organization, and opened up foreign markets for Ethiopian honey. Changes in the opportunities to get loans or credit remained problematic in all four Ethiopian chains, including that of honey.

Secondly we analyzed the internal dynamics of the four value chain MSPs by using ten factors for successful collaboration. Four of these factors were identified as key conditions for value chain MSPs because they proved to have had the most explanatory power in respect of the MSP output. In general, we conclude that the more value chain partnerships build trust among value chain stakeholders, operate under private sector leadership, and have highly embedded and involved partners, the better the partnerships are able to address, and mitigate or remove institutional barriers to upgrading by value chain actors. Trust building among chain stakeholders is needed to identify common goals and implement the resulting strategy. The absence of trust development may endanger the entire value chain partnership. Private sector leadership was also found to be a key condition. A strong and committed business leader who can act as *primus inter pares* has the capacity to convince the partners and to organize the chain into a more powerful sector. Private sector leadership is based on the ability to bring in own networks and resources, and to bridge divides between stakeholder groups. If no company can fulfill this role, leadership remains contested and hinders successful inclusive value chain development. Societal embeddedness was found to be a third key condition. Highly embedded value chain MSPs enhance general networking opportunities for their members, resulting in multidirectional information flows and transfer of information and contacts to the benefit of the members. Without strong societal anchoring, value chain development is likely to be flawed.

The fourth key condition is stakeholder involvement. If a value chain partnership does not manage to include *all* key chain stakeholders into the platform, there is a risk of ending up with two value chain stakeholder networks that follow opposing strategies. The honey MSP was successful because it worked on the development of a new chain with few existing, old market institutions, and where most stakeholders had no (bad) earlier experiences with one another. Also for the government the honey MSP was a new, additional opportunity where its

involvement quickly opened up new export markets. Moreover, honey is a non-perishable product that puts less immediate stress on producer-processor relationships. The honey MSP therefore managed to develop trusted relationships, a strong export-orientation, and could tie a core group of committed stakeholders under strong private sector leadership.

The dairy, oilseeds and pineapple value chain multi-stakeholder platforms on the other hand, struggled more with existing institutional structures and vested interests defended by individual stakeholders. This situation has limited the value chain partnerships in their operations. The merit of value chain partnerships is their potential of inducing change to create win-win situations. But this proved to be challenging. Some stakeholders may wish no change when they fear that it undermines their dominant market position. The dairy network – where the MSP struggled most with vested interests - therefore lacked involvement of the two main private processing companies. The existence of two stakeholder groups – dairy producers and processors –, for whom it proved difficult to recognize each others' interests in the chain constituted an additional constraint to the performance of the dairy MSP. Also the government was not very interested in change because Ethiopian dairy products are currently not being exported. It is therefore not surprising that a private sector leader, capable of organizing the dairy chain, was not found.

From the four key conditions for successful collaboration identified in this study, stakeholder involvement may be the most challenging. Particularly the dairy and pineapple cases showed that for initiators of partnership programs reaching out to obstructing, non-participating stakeholders is a real issue when the latter hinder the changes promoted. For successful multi-stakeholder partnerships, one could consider a strategy vis-à-vis established dominant chain stakeholders in case they significantly hinder necessary changes in the sector's business environment. Involving opposing actors, often leading business organizations, could contribute significantly to building trust relations and embeddedness in society.

Second, initiators of partnership programs need to put extra effort in finding 'the champions', the credible local leaders that are in the position to bring in their own networks and resources. If those leaders possess the capability to bridge (existing) divides, they can fulfill the leading role of 'organizational broker'. If such an actor does not exist, than the leadership issue is likely to continue to be a hot issue. This is especially true in cases where the divides among stakeholders are wide.

Third, a successful multi-stakeholder partnership needs to be embedded in all sectors of society. Initiators of partnerships programs could consider stepping-up efforts to have key decision makers at the relevant state-levels and the lead private firms or private sector associations aboard in the MSPs. Embeddedness in civil society contributes to exchange of knowledge, resource and networks.

Lastly, in large MSPs, subgroup discussions help building trust. Initiators could deliberately encourage chain stakeholders to have bilateral discussions. Trust build in the multi-stakeholder meetings positively relates to, for example, improved access to markets as buyers and suppliers engage in trusted relationships.

Finally, it remains challenging to determine clear causality in the relationships between MSPs and their effects. It would therefore be interesting to further research the micro-level performance of farms and firms before and after becoming part of a value chain partnership. A longitudinal study that covers firms in various sectors and/or (value chain) partnerships with various characteristics could challenge the attribution problem facing any partnerships impact evaluation.

## Acknowledgements

The authors would like to thank SNV Development Organization and the Partnerships Resource Centre (PrC) for sponsoring the research and providing logistical support.

## Notes

1 We used the following classification of organizations in type (private sector, public sector, and civil society) and subtype (e.g. processing company, producer, consultant, research institute etc.).

2 A value chain approach characterized by a combined sector and business to business orientation, multi-stakeholder platforms for decision making processes and anchoring of local ownership, leverage and innovation funds, the use of local consultants and capacity builders, and a firm direction towards the private sector (IOB Inception report, 2009).

3 An oligopsonic market refers to a situation of a small number of buyers dealing with a large number of sellers.

4 Rotation of organizations in the meetings is related to both variable organizations present at the meetings, as well as to different representatives of one organization. Derived from a social network analysis, the total percentage of exits are the combined percentages of organizations grouped under the category of 'present & exit' (present at meeting 1 and/or 2; last visit at meeting 16 or earlier) and those organizations grouped under the category 'entry & exit' (first visit at meeting 3 or later; last visit at meeting 16 or earlier).

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