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Multi-Stakeholder Platform Contribution to Value Chain Development

The Honey and Beeswax Value Chain in Ethiopia

Sarah Drost, Maastricht School of Management
Jeroen van Wijk , Maastricht School of Management

Final Case Study Report

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Abstract

This report investigates the dynamics of a multi-stakeholder platform (named: coordination group, or CG) for stakeholders of the honey and bees wax value chains in Ethiopia. The CG was initiated by the Dutch development organisation SNV in 2005 as part of a broader programme to improve market access for farmers and small- and medium-sized honey companies. To examine the MSP, both its internal, organisational dynamics and its external dynamics, i.e. the changes brought about in key areas of the institutional business environment, were analysed. A mixed-method design was used for the data collection and -analysis, including in-depth interviews with 18 key representative honey stakeholders participating in the CG meetings, document analysis, and a social network analysis. The dominant impression is that the CG has positively contributed to the development of the Ethiopian honey and beeswax value chains. The CG has enabled stakeholders from the three societal sectors to participate in a new, loose governance structure that meets the majority of collaboration requirements. It managed to develop a strong export-orientation, tie a nucleus group of committed stakeholders, maintain a fairly horizontal discussion structure, and gradually involve government authorities that previously had little interest in the sector. The CG operates as a platform that facilitates social capital formation in the fragmented honey sector. Ethiopian honey stakeholders have better access to relevant knowledge, their export opportunities have improved, and they are better organized in associations. Little change was achieved in respect of access to credit or capital.

Acknowledgments
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Picture cover page: Petterik Wiggers

Abbreviations

AACCSA	Addis Ababa Chamber of Commerce Sectoral Association
B2B	Business to Business
BCaD	Consulting Management Business Creation and Development Services
BDS	Business Development Services
BOAM	Business Organisations and their Access to Markets (programme)
BoFED	Bureau of Finance and Economic Development
CG	Coordination Group
DSA	Daily Subsistence Allowance
EAB	Ethiopian Apiculture Board
EBA	Ethiopia Beekeeping Association
EHBPEA	Ethiopian Honey & Beeswax Producers and Exporters Association
ESBA	East Shoa Beekeepers Association
FBO	Farmer Based Organisation
HBRC	Holeta Bee Research Centre
HVC	Honey Value Chain
MFI	Micro Finance Institute
MoA	Ministry of Agriculture
MoTI	Ministry of Trade and Industry
MoU	Memorandum of Understanding
MSM	Maastricht School of Management
MSP	Multi-Stakeholder Platform
NGO	Non-Governmental Organisation
PLC	Private Limited Company
PrC	Partnerships Resource Centre
R&D	Research & Development
RTA	Round Table Africa
SDC	Sustainable Development Center
SIP	Strategic Intervention Plan
SME	Small and Medium Enterprises
SNNPR	Southern Nations, Nationalities, and People's Region
SNV	Netherlands Development Organisation
VC	Value Chain
VCD	Value Chain Development
VCF	Value Chain Financing

Exchange Rate

Exchange rate of November 26, 2010:
1 Euro(s) = 22.34 Ethiopian Birr

1. Introduction

Multi-stakeholder platforms[1] (MSPs) are increasingly recognized by researchers and practitioners as promising mechanisms for stimulating economies in developing countries. The so-called chain platforms can help to bring actors, operating directly or indirectly in the chain, together and realise common objectives through dialogue and cooperation (Vermeulen et al., 2008). An increasing number of non-governmental organisations (NGOs) and private enterprises are participating in such platforms, however systematic research on their effectiveness and impact is scarce. Therefore, Maastricht School of Management (MSM) / Partnerships Resource Centre (PrC) and SNV BOAM-Ethiopia have embarked on a collaborative effort to evaluate a number of MSPs which SNV BOAM initiated with the aim of developing value chains for the Ethiopian honey and beeswax, dairy, oil seeds and pineapple sector. **SNV**[2] is a non-profit, international development organisation, with extensive hands-on experience in their value chain approach. **MSM's Sustainable Development Center**[3] stands for expertise on sustainable economic development in emerging markets. MSM is partner in the **Partnerships Resource Centre**[4], an open centre where academics, practitioners and students can create, retrieve and share knowledge on cross sector partnerships for sustainable development.

1.1 Research objective and aims

This honey and beeswax case study assesses the effects of the multi-stakeholder platform that was established by SNV BOAM to improve access to (quality) markets for stakeholders in the honey and beeswax value chain in Ethiopia. The core of SNV BOAM's approach is to bring primary and secondary value chain actors and other stakeholders together to find solutions for identified bottlenecks in the value chain. These actors join forces in the so-called Coordinating Groups (CGs), which have a multi-stakeholder nature[5].

The overall objective of the study is to gain insight and generate knowledge on how, and under which conditions multi-stakeholder platforms contribute to the development of value chains, with a focus on SNV BOAM's programme (agriculture, horticulture) value chains in Ethiopia. Critical success factors and main bottlenecks of MSPs for value chain development in Ethiopia are to be identified. In terms of contribution the synthesis report of the overall study has three aims. First, the study should contribute to the learning process of MSP members and other local Ethiopian stakeholders through verification of results and knowledge dissemination. Second, the synthesis report should end with recommendations on how SNV BOAM can improve its multi-stakeholder processes to increase their contribution to value chain development. Finally, the study should contribute to the academic debate on how value chain partnerships can facilitate sustainable competitiveness in developing

[1] Comprising of dialogues, policy making, and implementation, the term 'multi-stakeholder' is often attached to, platforms, processes, and partnerships (Warner, 2006). In this research we refer to multi-stakeholder *platforms* when discussing MSPs.
[2] SNV BOAM Ethiopia: www.SNV BOAMworld.org/en/countries/ethiopia/Pages/default.aspx
[3] MSM - SDC: www.msm.nl/1/1/uk/research/sustainable_development_center/
[4] PrC: www.erim.eur.nl/ERIM/Research/Centres/SCOPE/Partnerships_Resource_Centre/About
[5] Website SNV BOAM & Annual Report 2008

countries. This honey and beeswax case study provides input for all three aims, however, reports only on the first aim.

1.2 Theoretical background

> Multi-stakeholder initiatives are generally characterised as horizontally organised, with a greater degree of flexibility and openness as traditional forms of governance. In policy-related documents, MSPs are often considered as highly promising alternative forms of governance. They are based on the "recognition of the importance of achieving equity and accountability", involving equitable representation of stakeholder views, and are "based on democratic principles of transparency and participation" aiming to develop "partnerships and strengthened networks among stakeholders" (Hemmati, 2002:2).

Institutional theory, social network theory and collaboration literature has been explored to gain insight and generate knowledge on how, and under which conditions partnerships (including MSPs) can contribute to changing institutional business environments to facilitate the inclusion of small and medium agribusiness players into value chains. The effects of the MSPs are examined in terms of their a) internal dynamics (basic collaboration, embeddedness and involvement) including a social network analysis, and b) external dynamics (the changes in key areas of the institutional business environment). The theoretical model is visualized in *appendix 1.*

(a) Internal dynamics
From the collaboration literature, the level of engagement of partners, formalized goal alignment, shared (decision making) processes and activities, and transparency are among the main **basic requirements for successful collaboration** (Kolk et al. 2008). A high level of engagement of stakeholders, proper goal alignment, formalisation, risk- and resource-sharing, trust and transparency, shared learning, and joint decision making are critical factors for successful multi-stakeholder platforms, particularly when these deal with more ambitious and complex issues (Ansell & Gash 2008; Springer-Heinze 2007, Bitzer et al. 2010, Kolk et al. 2008).

Collaboration presents the highest strategic level of engagement and implies that the partners share risks, resources and rewards (Austin 2007). This also entails a formalisation of governance structures, including contractual arrangements to specify objectives, activities and responsibilities. Moreover, the relationship between actors refers to the range of actors actually participating in the partnership. The value of partnerships lies in the potential to create win-win situations if all stakeholders are willing and able to contribute to the achievement of goals (Bitzer et al. 2010a). Trust, risk- and resource-sharing and transparency are indispensable in here, as well as notions on power distributions in the value chain MSPs.

In a four-year study of the collaborative activities of as small NGO in Palestine, Lawrence et al. (2002) found that inter-organisational collaboration leads to the development of new institutions (new practices, technologies and rules). Collaborations that are both highly embedded and have highly involved partners, are the most likely to generate “proto-institutions”. New rules, technologies and practices arise and are diffused beyond the boundaries of the specific MSP contexts, and adopted by other organisations in the field: they become proto-institutions. 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: 283). They may become new institutions if they diffuse sufficiently. **Embeddedness** describes the degree to which a collaboration is enmeshed in inter-organisational relationships (Dacin et al. 1999; Granovetter 1985). Highly embedded collaborations involve (1) interactions with third parties, (2) representation arrangements, and (3) multidirectional information flows (Lawrence et al. 2002). In order to examine whether the honey CG has brought about changes in institutional fields we investigate not only the relations among collaborating MSP members, but also how the collaboration embeds them in the wider institutional field.

Involvement focuses on the way in which participating organisations relate to each other. According to Lawrence et al. (2002), high levels of involvement entail “deep interactions among participants, partnership arrangements, and bilateral information flows”. A high level of involvement among participants is necessary for institution creation. The internal dimension of partnerships is also explored in terms of the intensity of actor involvement. If the involvement of an actor is vital for the functioning of the partnership, from design to monitoring, we speak of a high degree of involvement. A medium degree of involvement occurs when an actor only participates during the implementation stages and fulfils particular tasks. If an actor only participates sporadically or not at all, we can speak of ‘no involvement’ (Bitzer et al. 2010b).

The internal dynamics are verified and complemented with a **social network analysis**. The network approach “allows researchers to capture the interactions of any individual unit within the larger field of activity to which the unit belongs” (Kilduff & Tsai, 2003: 13). A social network analysis describes network characteristics and concepts such as embeddedness, social capital, and network centrality. Moreover, a social network analysis has the ability to address important aspects of the social structure of a network: the sources and distribution of power (Hanneman & Riddle 2005). In the MSP research, the network analysis enabled the researchers to gain insight on:

- The main (core) organisations, stakeholder groups and sectors participating and brokering in the MSPs (betweenness centrality);
- The proportion and types of organisations in the three societal sectors: public and private sector and civil society;
- Visitor patterns (core visitor, regular visitor, irregular visitor, at random visitor);
- The proportion of visitors that left the MSP series early (exits);

The centrality analysis helps us to understand the overall social structure of the MSP networks. Those organizations having the highest scores on betweenness centralities (the highest number of ties) in the network are the most central players in the MSP networks (Kilduff & Tsai, 2003). Moreover, more connections often mean that individuals are exposed to more diverse information. The more connected actors in the network are, the higher the likelihood that they are able to mobilize their resources and to bring diverse and multiple perspectives to solve problems. The number and kinds of ties actors have determine the range of opportunities, influence and power they have (Hanneman & Riddle 2005). "Actors who have more ties have greater opportunities because they have choices. This autonomy makes them less dependent on any specific other actor, and hence more powerful" (Hanneman & Riddle 2005: 61).

Apart from a measure to identify the most central actors, betweenness centrality is a measure for the degree that actors connect two other actors that do not have a direct link themselves. In our study it refers to the following illustrative situation: actor A is present at CG meeting 1 and actor B at meeting 2. If attending both meetings, actor C connects A with B. The hypothesis is that C is able to facilitate a flow of information from A to B and vice versa. If actors cannot reach each other, or cannot be reached by another actor, learning, support or influence between the two is restrained (Hanneman & Riddle 2005). Therefore, the higher the number of network players that have a high betweenness centrality, the more horizontal the network. Information can be diffused through multiple paths, through network 'brokers' that are in between other network players. The more network brokers there are, the more likely that actors have alternative ways of connection to other actors and can by-pass a given (dominant) actor (Hanneman & Riddle 2005). With smaller numbers of players with a high centrality, the network becomes more hierarchical as fewer players control intermediary information diffusion.

Finally, it is possible that those players perceive themselves as different from others in the population as "they see themselves as the movers-and-shakers, and the dealmakers that made things happen" (Hanneman & Riddle 2005: 68).

(b) External dynamics

The external dynamics refer to the perceived changes in institutional business environment that facilitate inclusion of small and medium sized agri-business players into the honey and bees wax value chains. The fragmented nature of Africa's agricultural sector is one of the limiting factors to its development. The majority of farmers and SMEs face huge barriers to link themselves to national and global markets, while access to these markets is considered critical to growth in developing countries (OECD, 2006; World Bank, 2008). The most important institutional challenges to inclusion in commercial value chains concern those formal rules, inter-organisational arrangements, and informal customs that prevent farmers and SMEs from having access to knowledge & technology, credit, markets, and professional organisations (Bitzer et al. 2010b; Van Wijk and Kwakkenbos 2011).

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). 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). Farmers are exposed to highly volatile markets, which hinder investments in the agricultural sector. A more **stable market** for suppliers through buyer commitment and price stability would motivate farmers and SMEs to invest in production capacity and quality improvement (Gibbon and Ponte, 2005). Finally, chain actors, particularly farmers need to be organized to develop capacity in terms of supplying volumes and quality, and guaranteeing regular supply. **Access to organisations** facilitate risk sharing, the pooling of resources, enable collective learning, and developing market power (KIT *et al.*, 2006).

1.3 Methodology

Several methods were used for the **data collection** process: analysis of existing documents (field documents), in-depth interviews and group discussions with SNV BOAM in Ethiopia. Both qualitative and quantitative data were gathered. All primary data were collected in Ethiopia from August to November 2010, both in the Oromia and SNNPR regions. Research was executed in collaboration with a team of local consultants that was especially responsible for the interviews in the oil seeds value chain CG.

A sample of 18 CG stakeholders was drawn for the **interviews** in the following manner. We selected candidates from participant lists of five Coordination Meetings (begin, end and middle) who played specific roles in the honey and beeswax value chains, such as *chain actors*, *chain supporters*, *chain influencers*, and *chain facilitators*[6]. Some critical and reluctant stakeholders were explicitly included. Eventually, interviews were held with all relevant value chain stakeholders (*Table 1*). The researchers also made field visits to households engaged in backyard beekeeping. For a complete overview of the interviewees and interview schedule, see *appendix 3*. For confidentiality reasons, they are made anonymous in the report.

Table 1. Interviewees by stakeholder group

Stakeholder Group	Interviewees	Percentage (%)	Type
Chain actors	8	44	Input supplier, beekeepers, cooperative union, processing companies, beekeeping association.
Chain supporters	5	28	MFI, consultants (Quality and Safety Standards), NGO involved in extension training, BDS provider.
Chain influencers	3	17	Ministry, beekeeping association, Chamber of Commerce.
Chain facilitators	2	11	NGOs
Total	**18**	**100**	

[6] For a complete overview of stakeholder roles in the value chain, see *appendix 2*.

A **database** was constructed that scores the participation of each organisation in each Coordination Group meeting (18 in total), the type and subtype of the organisation and its role in the value chain[7]. Finally, the Coordination Group meeting was attended to a) have an idea of the working of the CG in practice, and b) to introduce the researchers to the relevant stakeholders in order to promote interview response. The questionnaire can be found in *appendix 4*.

On the basis of the database, a **social network analysis** was executed with the program UCINET 6.303 which is a comprehensive program for the analysis of social networks and other proximity data. The program contains dozens of network analytic routines (e.g. centrality measures, dyadic cohesion measures, positional analysis algorithms, clique finders, etc.). A social network analysis allows for linking micro and macro levels, and an integration between qualitative, quantitative and graphical data. In this research, the social network analysis is mainly used to verify the qualitative data. In the report, qualitative descriptions are presented, and -if applicable- followed by a quantitative check resulting from the network analysis.

Not all **interview questions** were propounded to all 18 interviewees. Since we were interested in the social mechanisms at work rather than in statistical realities, only those having expertise or being knowledgeable on a certain subject were questioned on that subject. For example, a financial institute might be less knowledgeable on the (technical) varieties that exist in the value chain product, or a research institute that has no expertise on the contractual agreements that exist between suppliers and buyers. In other cases, the respondent had only attended one CG meeting and therefore lacked knowledge of CG internal processes over time. Moreover, time pressure indicated by the respondent was taken into account during the interviews that lasted on average 1.5 hours. Although effort was made to propose as many questions as possible to all stakeholder groups, conclusions are often based on the views of less than the 18 respondents.

The **secondary data** included content analysis of the BOAM programme, with relevant documentation including all Coordination Group meeting minutes and impact data on production, income and employment areas provided by SNV BOAM Ethiopia. Furthermore, the secondary data include descriptions of the honey value chain markets, the apiculture sub-sector in Ethiopia, and relevant aspects of collaboration literature and institutional change theory.

All interviews were summarized and **data were analysed** with the qualitative analysis software program MAXQDA. Network analysis has been executed for the two-mode database containing organisations which have attended the honey CG meetings in Ethiopia.

Finally, all outcomes are cross checked, compared to and extended with information provided by several key informants to ensure triangulation (e.g. SNV BOAM staff, experts, chain Lead Advisors).

[7] The classification of organisations in type (private sector, public sector, civil society and education), subtype (e.g. processing company, producer, consultant, research institute etc.) and value chain role (chain actor, supporter, influencer and facilitator) has to be regarded as an **analytical tool**. In reality, there is not such strict distinction, as for example many producer cooperatives (now classified as a business representative body in the private sector) are also involved in civil society activities. However, their main aim is to represent an economic active producer group and most of the time, the cooperatives engage in chain actor activities (e.g. collecting honey or processing tasks). This is the reason to classify them under the private sector. Another example is a university (classified under Education) who acts as a BDS provider as well.

1.4 Outline of this report

The report is structured as follows: chapter 2 clarifies the context of this study by providing a short background on the apiculture market and sector, its main constraints and SNV BOAM's strategy of establishing the Honey Coordination Group. In chapter 3, the internal dynamics of the Honey Coordination Group are presented. Chapter 4 analyses the perceived changes in the institutional business environment of the honey value chain, as a result of the MSP (external dynamics). Chapter 5 hints at the future outlook of the MSP and the value chain, while chapter 6 and 7 conclude with a discussion of results and limitations of the study.

2. Context of the case study

2.1 The Apiculture Sector

This section describes the a) demand driven international honey and beeswax markets, the b) supply driven potential for apiculture development in Ethiopia, the c) Ethiopian honey value chain map, the d) main constraints in the apiculture sector according to the interviewees and e) SNV BOAM's strategy to tackle these problems.

(a) International honey and bees wax markets
The world market for honey is considerable, and demand is on the increase. Global honey production is over 1250 metric tonnes, worth US$1.5 billion (Bell 2009). China, Argentina and Mexico together produce about 60 percent of world-traded honey. The EU, USA and Japan account for about 70 percent of world honey imports (Bradbear 2009: 143). A "significant shortage" of white honey in particular has emerged due to adverse weather conditions in North and South America, diseases among bee colonies, but also due to increasing demand of honey as a 'green' natural health product (Phipps, 2010). The 2003 world market of bees wax is relatively small with an estimated 10 metric tonnes. The majority of this is imported by the European Union, particularly by pharmaceutical companies in Germany, France and the UK (Bradbear 2009: 106).

Despite the global market opportunities a recent FAO report on apiculture concludes that in developing countries production is fragmented without lobbying power. Producers are often amongst the most remote and poor people who work under adverse conditions. They lack appropriate extension material, marketing information, skilled trainers, strong organisations representing the interests of beekeepers, and the linkages between producers and buyers are hardly developed. Few developing countries have beekeeping policies for protection of the industry (Bradbear 2009: 143).

(b) Ethiopian honey market
Next to international market opportunities, Ethiopian beekeepers could benefit from a considerable national market for honey and beeswax. Honey is used for medicinal purposes, and beeswax for candles[8], but Ethiopia's main market for honey is a traditional honey wine, called *tej*. In total, 90 % of the honey produced in Ethiopia is utilised to produce this local honey wine[9]. Since this local brew does not require high quality honey, crude honey is the major type of honey produced in Ethiopia. The issue of quality has therefore never become a priority among Ethiopian producers and that has now become one of the main problems in the sector. There is not a sufficient supply of quality, table-grade honey.

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[10]. Ethiopia is the world's 10th biggest honey producer and

[8] SNV BOAM report 'Value Chains Identification for Intervention', 2005
[9] Clarification meeting SNV BOAM, November 8, 2010
[10] SNV BOAM 2 proposal, 2010-2011

the 4th largest beeswax producer[11]. In addition, it is estimated that private small beekeepers in Ethiopia own a total of 5, 15 million beehives[12] of which the majority is traditional, an estimated 4,7 million[13]. Moreover, 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 labelled honey and beeswax products. In terms of volume, the annual honey production in the country is approximately 39,700 tons per year, although it has the potential to produce up to 500,000 tons of honey and 50,000 tons of beeswax per year[14].

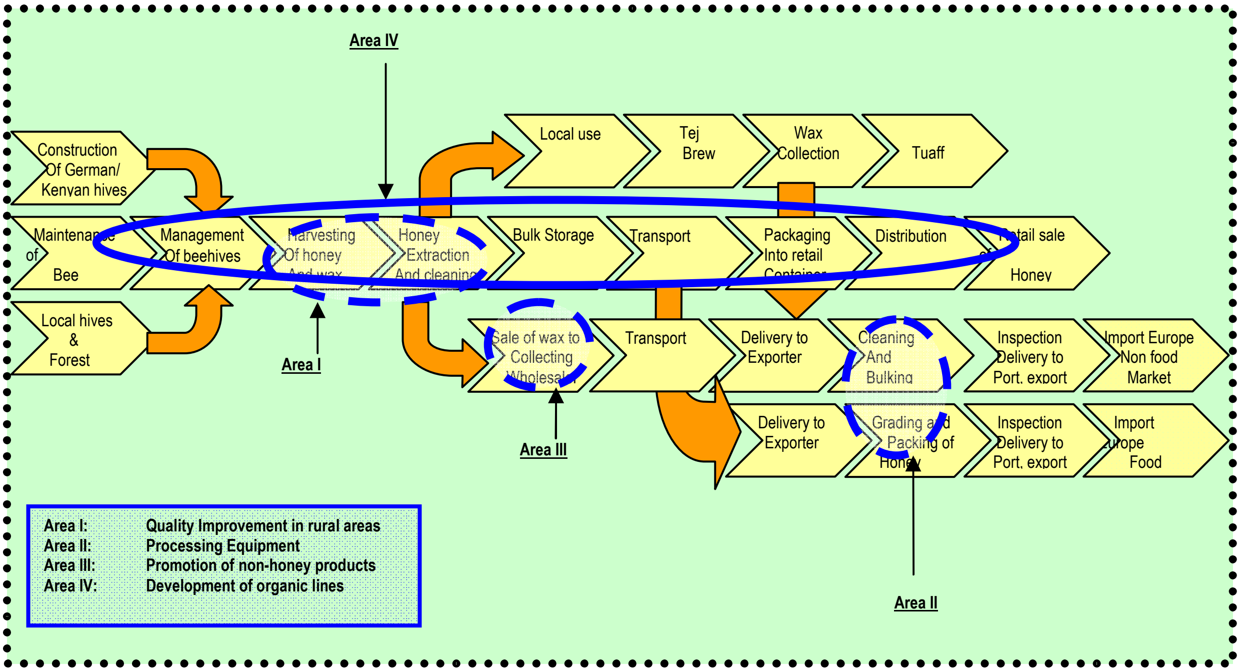
Dependence on traditional and low technology input, poor pre and post harvest management, inadequate extension services and poor marketing infrastructure are affecting the promotion and development of honey production and marketing. Furthermore, lack of smallholders' access to finance contributes to inhibiting the adoption of improved technologies for honey production. Poor quality, limited supply in the face of high local demand entailing higher domestic prices, coupled with the absence of organized market channels and lack of information have made Ethiopian honey uncompetitive in the international market[15].

(c) Honey value chain map

Figure 1 shows the Ethiopian part of the global honey and beeswax value chain, with indicated intervention areas, as visualized by SNV BOAM. SNV BOAM's interventions mainly address the exporters, processors and farmer organisations with the aim of improving linkages between mid-chain buyers and producers. Chain options where beekeepers (or their cooperatives) sell directly to retailers, while bypassing processing companies, are explicitly not taken into account by SNV BOAM.

[11] SNV BOAM report 'Value Chains Identification for Intervention', 2005
[12] Global Development Solutions, 2009
[13] Ethiopian Central Statistical Authority (CSA), Agricultural Sample Survey report for 2008/2009
[14] SNV BOAM report 'Value Chains Identification for Intervention', 2005
[15] SNV BOAM annual report, 2009

Figure 1. Honey and beeswax products value chain map with indicated intervention areas



(d) Constraints in the apiculture sector

Stakeholders in the honey value chain perceive a multitude of constraints to apiculture development. According to the interviewees (*Table 2*), there is a lack of government attention and recognition to the apiculture sector as an agricultural activity on its own as it is defined as an off farm activity. As a result, mandatory quality standards are lacking, there is no proper regulation body or testing laboratory, opportunities to obtain land for beekeeping are restricted, there is illegal export of honey across the Sudan border, extension services lack specialized knowledge, and if there are any policies at all, in the opinion of interviewees they do not match reality on the ground or are not endorsed yet. In addition, there is little financial investment and promotion of apiculture. In general, a problem with the Ethiopian financial system can be witnessed: high interest rates, short term small loans, and banks and MFI's unwillingness to provide money to the smallholder farmers and SME's due to collateral problems.

Regarding issues related to production, the main problems are the small scale poor productive character of honey and beeswax production resulting in high farm gate prices[16] and the general traditionalism in the beekeeping practices which makes it difficult to change attitudes towards poor beekeeping management, lack of inputs (e.g. modern beehives) and technology, climate conditions hampering production, and finally lack of access to bee colonies, lack of capacity to promote honey products, deforestation, and lack of access to exporter buyer companies.

Regarding issues related to processing, the main problems are problems with adulteration due to the lack of standards, the shortage of sufficient quality honey for processors, a packaging problem (does not comply with EU standards) and limited

[16] Farm gate price = price of the product at which it is sold by the farm.

access to packing material and due to high-farm gate prices honey cannot compete in the International market. Finally, farmers "forget on the trainings they received".

Table 2. Main constraints in the apiculture sector in Ethiopia per stakeholder's group and number of times indicated by the interviewees (frequency)

Constraints in apiculture sector	Frequency
General	
Lack of government attention to sector	7
Discouraging financial system (i.e. high interest rates, no collateral)	7
Policies do not match reality on the ground	4
Lack of mandatory standards	3
No proper regulatory body or testing laboratory	3
Land policy restriction	3
Illegal export of honey across the Sudan border	2
Extension services are too general	2
Little financial investment and promotion of sector	2
Production related issues	
Lack of inputs and technology	5
High farm gate prices	3
Traditionalism in sector	2
Climate hampering conditions	2
Lack access bee colonies	1
Lack of capacity to promote honey products	1
Deforestation	1
No access to exporter buyer companies	1
Processing related issues	
Lack of standards resulting in adulteration	5
Packing related problem	4
Cannot compete in international market due high farm gate price	3
Trainings not durable	2
Shortage of quality honey	2

(d) SNV BOAM strategy in the BOAM framework
To tackle these problems in the apiculture sector, SNV developed the 'Support to Business Organisations and their Access to Markets' (BOAM) programme [17]. Under this programme, a Value Chain Development (VCD) approach was developed. It is "characterized by (i) a combined sector and business to business (B2B) orientation" (IOB Inception Report, 2009: 27), (ii) a focus on 'pull' factors; working from the middle of the value chain at both 'up-stream' and 'down-stream' levels (*pers. comm.* SNV BOAM, February 2011), (iii) "a firm direction towards the private sector (private businesses) as the entry point, (iv) the use of multi stakeholder processes in the form of Coordination Groups as the platform for decision making and anchoring of the local ownership, (v) the use of local consultants or capacity builders to increase outreach, sustainability and ownership and (vi) the use of leverage and innovation funds" (IOB Inception Report, 2009: 27). Therefore, the MSP approach is only one part of the whole 'holistic' SNV BOAM value chain approach.

The BOAM programme is based on the idea that change can only be induced if it builds on knowledge and experience already present in the concerning sectors. Establishing the CG was only a logical step in the process of bringing together all the relevant knowledge and experience of stakeholders in the concerning value chains[18]. SNV BOAM sees the CG as the main organ for governance and coordination of chain activities and stresses the importance of ownership through the formation of stakeholders' own network. Ground rules that should be adhered in the CG, according the participants, include transparency, commitment and dedication, sufficient preparation, information provision, and mutual respect.

Apart from BOAM, SNV runs 2 other value chain programmes (PSNP plus & RAIN) (SNV BOAM Annual Report 2009). Finally, the four case studies under study are only part of the impact areas, (sub) sectors and programs of SNV Ethiopia.

2.2 The Honey Coordination Group
The demand for high-quality honey in the international and Ethiopian markets served as fertile ground for SNV BOAM to establish a multi-stakeholder platform (named: Coordination Group) for the honey and beeswax value chain in 2005. The CG aims at promoting efficient and equitable linkages for the economically active poor along the agricultural value chain. Establishing the honey CG was one of SNV strategies under its BOAM programme.

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[17] SNV BOAM's programme, financed by the Embassy of the Kingdom of the Netherlands in Addis Ababa and until the end of 2009 by the Irish Embassy, contributes to sustainable poverty reduction in rural Ethiopia through value chain development. The overall BOAM programme period is five years, and started from September 2005. The programme aims at improving the access to markets for small and medium agribusiness players along selected value adding chains (SNV BOAM programme proposal 2005-2010). In 2009 a transformation process of the BOAM programme into a centre of excellence for value chain development has started in the form of BOAM2 scaling up phase. Some key chances are the emphasis on Business to Business (B2B) value chain development and the up-scaling of both production as well as a new fund structure. The additional target of the BOAM program up-scaling phase is to develop, test and introduce innovative approaches that aim to improve business to business relations in selected value chains (SNV BOAM annual report 2009). A one-year extension of the BOAM programme was requested and approved, until August 31, 2011, to maximize the results to be obtained from the BOAM programme (BOAM 2 programme proposal 2010-2011).

[18] Clarification meeting SNV BOAM, 8 November 2010.

From the network analysis we found that in total 127 different organisations attended the honey CG meetings 1-18 from 2005-2010[19].

The honey CG consists of representatives of key actors in the honey and beeswax chain (regional, national and sporadically international), including:

- Beekeepers associations, including the Ethiopia Beekeepers Association (EBA) and the East Shoa Beekeepers Association (ESBA);
- Private processing companies such as Beza Mar Agro Industry and Apinec Agro-Industry PLC;
- Producer cooperatives and unions such as Bench Maji Cooperative Union;
- Government authorities, including the Ministry of Agriculture (MoA);
- Private researchers and consultants including those affiliated with the Holeta Bee Research Center;
- The Addis Ababa Chamber of Commerce;
- NGOs (e.g. Melca Mahiber and Ratson); and
- Micro finance institutes (MFIs), such as Harbu MFI.

Under its BOAM programme, a *Value Chain Leader* and a *Value Chain Facilitator* is selected for each value chain CG. The Value Chain Leader is chosen by the CG and acts as the focal person who should guarantee the local ownership of the CG and who is representing the CG. Ideally for SNV BOAM, a Chain Leader represents a key private sector organisation in the chain. In the honey CG, the managing director of Beza Mar Agro Industry, who is also the president of the Ethiopian Apiculture Board (EAB), was Chain Leader from meeting 1-19. The Chain Leader is supported by *value chain development advisors* or *coaches*, who add distinct expertise to the program (agro-processing, organisational strengthening, women entrepreneurship/gender and monitoring and evaluation). In addition, SNV BOAM makes available a Value Chain Facilitator to facilitate and activate communication amongst CG members and to disseminate information. The owner and the manager

Characterization CG
The majority of the interviewees characterize the honey CG as a 'learning platform' where experts, decision makers and innovators present their new ideas and technologies. The CG is also a 'network and information exchange forum' (e.g. who pays best prices) and has a voluntary set-up, no formal framework, and a non-binding character. It contributed to trust building and created linkages and collaborations between organisations that did not exchange information before the start of the meetings. Moreover, it identifies and discusses the bottlenecks to the development of the sector and seeks solutions. One interviewee believes it is "a small parliament with a representative, diverse group of stakeholders knowledgeable in different areas that have the capacity to influence the government, mainly through the Ethiopian Apiculture Board" (*interview*) and finally, it is "ran by stakeholders themselves" (*interview*). On the other hand, the interviewees are critical in their characterization as well. Looseness of the group, high rotation, lack of implementation and the non-create and innovative character of the meetings are points of discussion. In *chapter 3* they will be discussed in detail.

[19] By the end of 2010, already 19 meetings took place for the honey value ch
network analysis was based on 18 meetings due to the participation lists in
made available to the researchers at start of the research project in June 2010.

of the organisation Consulting Management Business Creation and Development Services (BCaD) served as Chain Facilitators in the honey value chain CG.

From September 2005 onward the Honey CG meetings have taken place every three months (four times a year). In general, the meetings have the following pattern: the CG Facilitator and Leader open the meeting with a recap of the previous meetings, participants introduce themselves, fund utilization reports are discussed, experts present about new researches and technologies related to the honey sector and Question and Answer Rounds are held in between. The first CG meeting started in English, but currently Amharic is the main language used in the meetings. The Facilitator translates if necessary.

Following the recommendations of the Mid Term Review (Aleme et al. 2008) an Executive Committee for the evaluation of concept notes for the BOAM designated funds was established. Next to this, SNV BOAM has assignment contracts indicating capacity building interventions with all clients (i.e. processors, farmer organisations, business associations, and government). Finally, a new funding structure was introduced.

3. Honey Coordination Group Dynamics

This chapter is meant to present the main findings regarding the internal dynamics that took place within the honey CG meetings 1-18 (2005-2010). The honey CG is assessed on the basis of basic collaboration requirements, and the levels of embeddedness and involvement.

Picture: Honey Coordination Group Meeting, 11 February 2010, Kings Hotel Addis Ababa

3.1 Basic Collaboration Requirements

The extent to which the honey CG meets basic collaboration requirements is examined by assessing so-called success factors. An overview of all these factors is provided in *Table 3*.

Table 3. Basic collaboration requirements and their success factors

Basis collaboration requirements	Success factors
3.1.1 Level of engagement	(a) Commitment (b) Motivations (c) Roles and contributions (d) Shared resources
3.1.2 Jointness	(a) Decision making (b) Selection stakeholders (c) Agenda setting (d) Distribution of benefits (e) Risk sharing
3.1.3 Transparency	(a) Accountability (b) Trust building
3.1.4 Goal alignment	(a) Clear objectives (b) Win-win opportunities (c) Compelling case

Source: Compilation based on Kolk et al. (2008), Van Tulder & Pfisterer (2008) and Bitzer et al. (2010).

3.1.1 Level of engagement

Success factors identified in the research for the level of engagement are fourfold: (a) a high level of commitment, (b) intrinsic motivation, (c) clarity of roles and contributions, and (d) resource sharing. Stakeholder engagement was verified with results from the social network analysis.

Table 4. Level of commitment evaluated

Commitment	Frequency	Percentage (%)
Low	1	8
Medium	5	42
High	6	50
Total	**12**	**100**

Source: interview data

(a) Commitment
For SNV BOAM, one of the drivers to start up the CG was to have the stakeholders "to run their own show" and to anticipate on the absence of associations, organisations and platforms in general *(interview)*. From the beginning it was the idea to shift from external support to internal organisation and as such creating commitment and ownership in the sector. But how do our honey and beeswax interviewees evaluate the level of commitment of their fellow honey CG colleagues?

In our interview sample, none of the interviewees visited the honey CG all 18 meetings. Six interviewees were classified 'regulars' (participating 15, 16, or 17 meetings), ten were classified 'irregular' members (present at least at three meetings with a maximum presence of 14 meetings) and two as 'at random visitor' (participating 0, 1, or 2 meetings). The general level of commitment is evaluated as modest (42 %) to high (50 %) (*Table 4*). Only one producer representative (*interview*) evaluated the commitment as low, mainly due to the fact that he believes that CG members are too dependent on donor money and not confident enough to stand on their own feet.

The level of commitment is rated as modest because the CG meetings are made up of two groups of participants. There is an active nucleus-group that is very commitment, with another, rotating group that is not "joining the meetings to contribute, but they are there to get something (e.g. funds)" (*interview*). The honey value chain Lead Advisor agrees that "we see one nucleus group and a rotating group in the CG meetings"[20]. Moreover, this rotating group lacks knowledge of the previous meetings and questions are repeated every meeting. To avoid rotation the latest invitation letters of SNV BOAM explicitly urge for the attendance of the same representatives to avoid rotation:

"We would highly appreciate if your good office could send the same representative who has been participating in previous MSPs" (source: Invitation letter 18th CG meeting honey VC).

However, half of the respondents on this issue believe the commitment in the honey CG is high, as for example the Ministry of Agriculture and the leading business associations such as the Ethiopia Beekeepers Association (EBA) and the Ethiopian Honey & Beeswax Producers and Exporters Association (EHBPEA) take high responsibility and did actively participate and facilitate in at least the honey sector and the honey CG. Moreover, the gradual reduction of the organisation costs and

[20] Group Discussion SNV BOAM, August 12, 2010.

Daily Subsistence Allowance (DSA) paid by SNV BOAM did not result in a diminishing number of participants.

(b) Motivations
The motivations to join the CG are diverse although for most interviewees linked to personal invitations by SNV BOAM. Six interviewees mentioned SNV BOAM's technical and financial assistance. Consultants, experts and the CG Facilitator were contracted by SNV BOAM and their motivations to join were linked to job opportunity creation. Moreover, some organisations were tipped by other organisations to join (see section 3.2 Embeddedness). Other motivations stated were: "the mandate of the CG resembles ours" (*interview*), "to make the honey sector competitive" (*interview*), "the company was looking for an organized forum to join and work to address the problems of the sector and the CG fulfilled in this" (*interview*), "they searched for assisting national structures in the apiculture sector" (*interview*), and "to increase network opportunities with processors, exporters and producers" (*interview*).

SNV BOAM has paid CG participants a DSA covering transportation costs and/or accommodation for those from far to level the playing field for stakeholders to participate. Although this financial incentive could be a motivation for participation in itself, it is not seen this way by the interviewees and by SNV BOAM[21]. Different invitation letters (12th, 14th and 18th CG meeting) show that the DSA support was reduced over time, while participation in the honey CG increased. In short, motivations to join the honey CG are partly intrinsic, however often also on the basis of invitation by SNV BOAM or other organisations. DSA does not seem to be of considerable influence.

(c) Roles and contributions
Operational plans agreed in several CG meetings clarify the roles and contributions of the main honey chain stakeholders present in the meetings. However, due to the lack of accountability mechanisms, there are no mechanisms to enforce them upon members (see section 3.1.3). Besides, due to the high number of participating organisations (127 organisations in total in all honey CG meetings) and the high rotation of members and organisations, operational plans are not representing all participating parties.

(d) Shared resources
We can conclude that resources are shared in the sense that each CG member has an equal opportunity to have access to financial and technical support delivered through the SNV BOAM funding programme[22]. However, the benefits to be obtained from this support are not always equal (see next section).

In the network analyses on course ratio these findings on stakeholder engagement were verified. To analyse the course ratio of the honey CG participation database four

[21] Clarification meeting SNV BOAM, November 8, 2010.
[22] In the beginning of the SNV BOAM programme (2005) the three types of funds accessible were the leverage fund, the research and study fund, and the financial intermediation fund. In line with the recommendations of the Mid-Term Review in 2008, the three new types of funds are the Sector Development Fund, the Pilot B2B Fund, and the Up-scaling Support Fund.

categories of visiting frequency of organisations have been determined (core visitor, regular visitor, irregular visitor, random visitor) as well as four categories of entry and exit behaviour of the organisations (present & stay, present & exit, entry & stay, and entry and exit). The descriptive statistics of both categories are calculated for the honey CG participation database and displayed in *Appendix 5*. A legend is attached. In *Table 5*, the visitor frequency in the honey CG is presented. In *Table 6* the total of exits from the honey CG is demonstrated.

Table 5 Visitor frequency per in honey CG (%)

Sector	**Core visitors**	**Regular visitors**	**Irregular visitors**	**At random visitors**
Honey	0,0	4,7	41,7	53,5

Table 6 Total of exits[23]

Sector	**%**
Honey	60,2

The social network analysis confirms that:

- There is irregular attendance of organisations in the honey CG meetings (*Table 5*). The proportion of core visitors (present at all meetings) and regular visitors (present at 15, 16 or 17 meetings) is modest. In the honey CG, there are no core visitors (present at all 18 meetings);
- There is high rotation of organisations in the honey CG meetings (*Table 6*). The total number of exits (present & exit + entry & exit) is 60,2 percent;
- The percentage of regular visitors is highest (4.7 percent) compared to the three other CGs (*Table 5*) (*synthesis report*). In the honey CG, interviewees put emphasis on the existence of a strong, highly committed nucleus group of attendants.

Overall, in the honey CG, the general level of engagement of CG members varied considerably, but a nucleus group of participants, well represented by all three societal sectors (private, public, civil society), is highly committed. A large peripheral group rotates frequently and therefore is less informed and less influential. CG members participate out of a combination of intrinsic motivation and financial and technical business support they can obtain from SNV BOAM's broader programme.

3.1.2 Jointness

The success factors identified in this case study to measure the level of 'jointness' in the CG meetings are: (a) decision making, (b) selection of stakeholders, (c) agenda setting, (d) distribution of benefits and (e) risk sharing.

(a) Decision making

The degree to which the decisions are jointly made in the honey CG was difficult to measure, as formal decisions are rarely made in the honey CG (see also section 3.1.3). Only a few moments of more formal decision making could be identified, and all were related to electing the nominees for certain positions in established committees or boards. Examples are the election of the CG Leader in meeting one, the election of

[23] Total exits = present & exit + entry & exit (see also *Appendix 6*)

Table 7 Equal say

Equal say	Frequency	Percentage (%)
Yes	12	93
No	1	7
Total	13	100

Source: interview data

members for the Quality Working Group in meeting 2, and the elections of the members of the Ethiopian Apiculture Board and the Executive Committee in meeting 13. Four of the interviewees, both producers and processors, explicitly state these decisions are being made by those present in the meeting, on the basis of the 'one man-one vote' principle. "Though the CG spends much of its time on discussion and learning activities, the decision making process is not dominated by some members, since they decide by voting" (*interviews*). Respondents believe that "plans are decided by all stakeholders" (*interview*); "decision making is on the basis of consensus" (*interview*); "there is neither entry barrier to the CG nor dominance of few members over the majority" (*interview*).

We addressed the question whether all members have an 'equal say' in the CG or whether some members are 'more equal than others'? Almost all respondents interviewed on this question believed members have an 'equal say' during the meetings with no influence of dominant members. They attributed this also to the CG Facilitator who effectively controls dominant members of the CG by giving all members a chance to speak out, mainly in Question and Answer rounds. One interviewee had a different opinion (*Table 7*), but he referred to the donor-recipients relations and not to the situation in the honey CG. In donor-recipients decisions he believes, donors (e.g. SNV BOAM) have the major position.

The role of the CG Leader on the 'jointness' in decision making processes requires elaboration. During the interviews it became clear that there is strong **leadership** in the honey CG. SNV BOAM prefers a private processing company as a Chain Leader because such a chain actor has strong interests in linkages "both upstream and downstream in the chain"[24], and the president of a prominent honey processing company was elected as a CG Leader. The CG Leader proved himself to be pro-active and a model example of blooming business in his own honey processing company with 50 % production increase and 150 % farmer income increase as a result of trainings provided to farmers. He provides CG members with Chain Leader reports and summaries of each meeting, and he is always present. His motivation to join the CG and to remain a very active CG Leader is that, in his own words, he "1) invested considerable amounts of money in the sector, and 2) he has genuine interest in the well being of his country, and he wants to make a change". Other interviewees confirmed the

[24] Discussion Group SNV BOAM, August 12, 2010.

CG Leader's commitment to the development of the apiculture sector, who has also become president of the Ethiopian Apiculture Board (EAB). The down-side of such strong leadership is the possibility of vertical arrangements among stakeholder cliques, which imply less 'jointness' and more dependencies in decision making. However, in the interview data no indications for such effects were found. The CG Leader's contribution is overall evaluated as highly positive.

SNV BOAM has made attempts to share some of its own responsibilities in respect of the honey and beeswax value chains to create more 'ownership' of the CG process with stakeholders. Its main initiatives were the establishment of the Executive Committee for the evaluation of concept notes regarding BOAM designated funds and the assignment contracts between SNV BOAM and its clients (including CG members) on capacity building interventions. In the meetings, joint Strategic Intervention Plans[25] (SIPs) and operational plans formulated. The CG Executive Committee should empower the sector in general and the CG in particular by giving stakeholders a say in the allocation of its honey-industry related funding. Financial ownership was created, to limited degree, in the following ways.

First, the Executive Committee, with five key actors from the Apiculture sector, could evaluate, approve or reject funding proposals, but it is the SNV BOAM program manager who takes the final decision.[26] Second, the SIPs and operational plans were adjusted in response to CG members at least two times, but that was already prepared in a preliminary stakeholder workshop with honey value chain representatives identified by SNV BOAM. Third, land policy issues are not included in the SIPs despite the stringent problems they cause for many stakeholders in the honey value chain. CG participants have raised the question why they are not included in the SIPs several times, but according to SNV BOAM, "land issues are part of government policy and cannot be discussed with the government" (*interview*). Fourth, the honey Executive Committee was effective only for a very limited time period (only 2 or 3 meetings). Fifth, SNV BOAM itself remains modest about the ownership that was created in this way. "Having the Executive committee decide on fund proposals was only a 'cosmetic measure': a small shift of ownership" (*interview*). Finally, as the CG meetings were not formally required under the MSP, there was no formal joint decision making on financial issues. Eventually, it was always SNV BOAM that decided on the final budget spending, although decisions made in the CG or by its Executive Committee were never bypassed by SNV BOAM and even the government "is looking at the CG before deciding on interventions" (*pers. comm.* SNV BOAM, January 2011). For an *informal* institution, this can be considered an achievement.

(b) Selection stakeholders

For interviewees, it is not unambiguous who invites stakeholders to the meetings. According to SNV BOAM and the CG Facilitator, selection and invitation of participants is generally decided by the CG Facilitator, the CG Leader, and the SNV

[25] The following Strategic Intervention Plans were agreed with the honey CG members in meeting 16: 1) Improving access to inputs and finances, 2) Improvement of knowledge, skills and practices of beekeepers, 3) Strengthening of government support to the sector (policy & extension work), 4) Collaboration among stakeholders at the local level (better relationships/contracts between processors and producers, and 5) Bee forage development.

[26] CG 13 meeting minutes.

BOAM value chain Lead Advisor. The invitation database builds on the previous meetings attendants, and when new organisations approach the Facilitators for an invitation the trio decides on approval. The CG Chain Leader confirms the invitation procedure (*interview*). According to him, SNV BOAM initially focused on the South West of Ethiopia with its high potential for honey production, but gradually they tried to cover a national stakeholder group by inviting representatives of other regions. Stakeholders are also selected on the basis of their job (processor, producer, researcher etc.) and their possible contribution (e.g. input supply, processors with good relations with farmers etc.) to the CG.

Interviewees however, believe it is the CG Facilitator in particular who invites participants to the CG meetings, or either SNV BOAM or the Ethiopian Apiculture Board.

According to the honey CG Facilitators (*interview*), about one or two weeks in advance of the next CG meeting, the CG Facilitator sends out a package per email or fax (no regular post mail) to the participants that includes the invitation letter, the agenda of the meeting, and a summary of about two pages on the previous meeting (not the full meeting minutes as MSM received them). Organisations that lack email addresses to receive the meeting agenda in advance miss the opportunity to anticipate and prepare on the meetings' agenda.

Changes in the SNV BOAM programme coordinating staff considerably influenced the new CGs invitation policy. "The first CG was developed from scratch and it was SNV BOAM who gathered all relevant stakeholders together"[27], and the first BOAM coordinator insisted the number of participants should not exceed 30-35. However, from meeting nine (end of 2007/beginning of 2008) the value chain Lead Advisors -headed by the second BOAM coordinator- started inviting many participants (often over 60 participants), aiming at broad based information dissemination. This prompted SNV BOAM to look more critical at the engagement processes within the coordination group[28]. Invitation became more regulated with only one participant from each organisation receiving DSA. Less relevant and non-motivated participants were removed from the participation lists, although this did not happen often according to the CG Facilitators (*interview*).

(c) Agenda setting

The agenda of the meeting builds on the previous CG meeting agenda. It is the Facilitator, the CG Leader and the SNV BOAM Lead Value Chain Advisor who decide on content (*interview*). Participants can bring in agenda points according to SNV BOAM (*interview*), but this is not explicitly stated in the invitation letter.

According to SNV BOAM, it dominated the early CG meetings with their presentations[29]. In the honey CG, there is one clear example of a processing company that exited the CG as it could not influence the agenda and working methods of SNV BOAM. Its main critique is that the forum does not address most of the 'hardware' related problems in the honey sector and hence, not a comprehensive and complete approach to the honey value chain. "Processing companies and farmers receive

[27] Discussion group SNV BOAM, August 12, 2010.
[28] SNV BOAM Annual Report 2009
[29] Discussion group SNV BOAM, August 12, 2010.

trainings to improve quality, however have neither access to technological input nor to finance" (*interview*). In chapter four, we elaborate on this matter.

(d) Distribution of benefits
The honey CG never explicitly identified benefits from the platform for the stakeholders. When asked during the interviews for benefits and the way they are distributed among CG members, the majority (62 %) of the respondents (both producers and processors) believed this is not equal (*Table 8).*

Table 8. Equal benefits

Equal benefit	Frequency	Percentage (%)
Yes	5	38
No	8	62
Total	13	100

Source: interview data

Those indicating the distribution of benefits was equal are closely related with SNV BOAM, either as employee, contractee, or are otherwise supported by SNV BOAM. CG members that are able to articulate their needs/demand and get their points on the agenda are more likely to benefit directly (*interviews).* Several interviewees said that less capacitated organisations did not have their funding proposals approved (e.g. *interviews*). Also SNV BOAM realizes that "participation is dominated by those making the best business out of it"[30]. One respondent believes that opportunities provided by the CG are more open to the exporters and they will generally benefit more from these types of meetings (*interview*).

(e) Risk sharing
The last indicator of jointness in the CG, the extent to which risks are shared between CG members *in the meeting*, appeared not very relevant, as resources are mainly brought in by SNV BOAM. CG members risk little in the meetings except their own time. In the honey value chains, risk uncertainties and transaction costs might have been diminished as a result of trust building in the CG (see also *next section*).

The degree of jointness of the CG members and the mutual independency among them are important measures for the level of 'jointness' in the MSP. Overall, the interviewees gave the impression that the CG leadership at least intends to let the MSP function in a horizontal manner. In the meetings, members have an equal chance to speak out, and there seem to be no dominant members. The CG Facilitator is managing this satisfactorily. The interviewees believe the decision making is on the basis of consensus. On the other hand, not all stakeholders have been able to articulate their needs/demand; only those who push their issues through in previous meetings can influence the CG agenda. The CG's centre of gravity remains with the leading trio including the CG Facilitator, the VC Leader and the SNV BOAM Lead

[30] Discussion group SNV BOAM, August 12, 2010.

value chain Advisor, with the sitting SNV BOAM programme coordinator as a significant influencer at the background.

In the social network analysis, betweenness centrality was among others used to identify the most central actors in the network. As stated before, those organizations having the highest scores on betweenness centralities in the network are the most central players in the MSP networks. In *Appendix 6*, the top-10 central network players of the honey CG are presented in tables. Their organisational type (private sector, public sector, civil society, or education), subtype (i.e. processor, producer, financial institute, business association, implementing agency etc.) and their stakeholder role (actor, supporter, influencer and facilitator) in the value chains were taken into account. The following regarding jointness was confirmed in the social network analysis:

- SNV BOAM is a central network player in the honey CG (*Appendix 6*). This corresponds with their leading role as an initiator of the whole program and the honey CG; their involvement in agenda setting and selection of stakeholders, and their final decision in financial affairs;
- The honey Chain Leader is visible as a central private actor in the honey CG (*Appendix 6*);
- The Chain Facilitators is visible as a central player in the honey CG (*Appendix 6*);
- The Ethiopian Beekeepers Association is central player in the honey network (*Appendix 6*);
- In the first nine meetings (till January 2008), about 25-35 participants can be observed in each meeting (*participation databases*), corresponding with the invitation policy of the first BOAM coordinator. After meeting nine, often over 50 participants -including several members of the same organisation- can be observed, especially in the honey CG (even 76 participants in meeting 15) (*participation databases*). This corresponds with the invitation policy of the value chain Lead Advisor headed by the second BOAM coordinator.

To identify and compare the genuine 'information brokers' –who are in between other network players and control information diffusion- in the honey network, only those organisations with a normalized betweenness centrality higher than 2 or 3 were taken into account in this part of the analysis[31]. In *Appendix 6* the central players with a betweenness centrality higher than 2 and 3 are presented.

Regarding 'information brokerage', the network analysis confirms and complements that:

- SNV BOAM plays the role of information broker in the honey CG, confirming its dominant position as MSPs initiator (*Appendix 6*);

[31] The cut-points 2 and 3 are arbitrary

- Measuring a betweenness centrality higher than 2 and 3, the honey CG Chain Leader plays the role of information broker, confirming its dominant and active position in the network (*Appendix 6*).

3.1.3 Transparency

Overall, the transparency of CG activities is rather high. The meetings are open to public (although more restricted towards the 18th meeting), and meeting summaries, agendas and other documents are shared with stakeholders. All CG documents could be downloaded from the former SNV BOAM website, although several links appeared to be dead and not all documents were available. It was also clear from the beginning that the Ethiopian Apiculture Board (EAB) would take over the CG meetings (already in place) and who would be the Chain Leader.

Success factors assessed under transparency were (a) accountability, and (b) trust building.

(a) Accountability

Formal accountability mechanisms are absent in the honey CG. Except for the Chain Leader, Chain Facilitator and other contractors with SNV BOAM (i.e. Technical Auditors), none of the stakeholders participating in the CG have been assigned *formal* duties and responsibilities. Therefore "the CG is characterized by slow solution seeking processes due to the lack of formal tasks assigned to CG members" (*interview*). According to the Chain Leader much more could have been reached in terms of implementation of solutions if "SNV BOAM, the Facilitator and myself would have invited key decision makers that would join the CG and could be hold accountable for the problems" (*interview*). Another interviewee pointed out that duties and responsibilities should have been designed to individual members along with defined monitoring procedures (*interview*). Nonetheless, several respondents believe there are forms of informal accountability at present (e.g. *interview*) as for example CG members receiving SNV BOAM funds need to present their fund utilization reports in the CG meetings. Not all fund users do so (in time), however.

(b) Trust building

A considerable contribution of the CG seems to be that it enables the creation of linkages between organisations that did not exchange information before the start of the meetings (*interviews*). "Partnerships between producers and processors as well as between processor and exporters are being facilitated" (*interview*). "Companies present their profiles and achievements in the meetings, and slowly start trusting each other and are more eager to collaborate" (*interview*). The concept of trust building is even literally used by this respondent to indicate the improved relations between producers and processors in the honey value chain. According to the minutes of meeting 16, the processors have started working jointly with cooperatives, and processing companies have begun collaborating with local governmental administrations to select beekeepers for trainings funded by SNV BOAM. Presently, 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 (*interview*).

3.1.4 Goal alignment

Goal alignment by stakeholders is considered to contribute to the effectiveness of collective goal-setting processes, which, in turn, positively influences the success of the MSP. Strong goal alignment and goal visibility allows for more effective execution of the SIPs identified in the process. Goal alignment is measured by assessing the success factors (a) 'clear objectives', (b) 'win-win opportunities', and (c) a 'compelling case' as driver of the MSP.

(a) Clear objectives

The formal aim of the CG –as formulated by SNV BOAM- is to promote efficient and equitable linkages for the economically active poor along the agricultural value chain[32]. This overall aim was specified ex ante by the Honey CG members as 'common MSP objectives' during the first CG meeting. Participants of this meeting suggested that the objectives should be:

- Developing the apiculture sector;
- Creating awareness on issues related to the sector to the general public;
- Filling the gap between private and public sectors, and
- Creating a forum to discuss and deliberate on issues of mutual concern to stakeholders in the sector.

Moreover the CG could help participants to identify needs and formulate requests for support from BOAM.

The history of the CG is important to understand the development of its interest alignment. In 2005, Beza Mar Agro Industry PLC was a pioneer in modern honey processing and it presented good quality products in a national exhibition. Its president was advised by a friend to have a talk with SNV BOAM because the NGO had plans to engage in the honey sector. The president presented his company at the SNV BOAM office, while SNV BOAM staff visited the exhibition which left them impressed by Beza Mar's products. SNV BOAM subsequently suggested the president to formalize the beekeepers and producers export association, the EHBPEA that receives an office and resources from USAID[33]. SNV BOAM also facilitated his experience-sharing visit to the Apimondia Fair in Ireland[34]. At the Fair, the president learned about the potential of the international honey market, and that "Ethiopia had the potential but could not yet export to the EU" (*interview*). He also met his first European buyer at that Fair, to whom he still sells his honey. After his return to Ethiopia, the president accepted SNV BOAM's invitation to share his experience to a group of stakeholders and the honey CG was borne (*interviews*).

The above story illustrates SNV BOAM's strategy to align the honey CG goals to the interests of (potential) exporters. The NGO first selected a promising export company, supported him in the establishment of a producers and processors association, and then initiated an MSP.

[32] An observation out of the secondary data is that the aim has gradually been shifting from 'creating linkages' towards 'creating ownership in the sector'. The third BOAM programme coordinator endorses this strategy towards a long term vision for the CG.

[33] Short progress discussion with SNV BOAM, September 9, 2010.

[34] Financed by the Irish embassy.

(b) Win-win opportunities

Do the members feel the CG facilitates a win-win situation for all? The fact that the 'Chain Leader' is from a private company makes this person vulnerable to possible (implicit) criticism that selection of invited stakeholders and agenda setting are in line with this company's interests and not necessarily with those of others. However, from the interview data no negative effects were reported by other members, and as we have seen in the section on risk sharing, CG members risk little except their time. This suggests that opportunities are equal for every CG member, although not every member has the same capacity to access these opportunities.

(c) Compelling case

Is the honey and beeswax CG driven by a 'compelling case', i.e. an important need that can be best fulfilled through an MSP, and that is recognized and accepted by all members? In the opinion of all seven respondents to this question the CG is recognised as an important mechanism supporting the development of the Ethiopian honey sector. The collaboration in a multi-stakeholder platform is considered necessary to tackle the problems in apiculture sector as a national problem and to create change in the whole country. "The CG is a vital instrument for the common interest in the apiculture sector, which was dominated by individual interests in the past" (*interview*). Moreover, the lack of recognition and stimulation of the apiculture sector by the government (*Table 2)* urged for stakeholders in the honey and beeswax value chain to organise themselves. In this way, it can be concluded that there is a compelling case for the honey CG as a vital first step to organize the apiculture sector. But the honey CG is only one element. The problems in the apiculture sector should also be tackled by strengthening and promoting individual associations, business providers, input suppliers, laboratories, wide-scale investment, appropriate credit systems, and regular awareness trainings in the mass media, according to the interviewees.

3.2 Embeddedness

To assess the degree to which the honey MSP is enmeshed in third organisations, we assessed its inter-organisational relationships through (a) the origin of the participants' link with the CG (was the motivation to join brought about by another organisation?), (b) the extent to which the MSP contributed to new professional organisations' memberships, (c) the involvement of participants in multiple MSPs, (d) relations with the government, and (e) SNV BOAM's inter-organisational embeddedness as a result of its MSP activities.

(a) The original link to the honey CG

The interviews show that inter-organisational relationships have been supportive in linking and motivating stakeholders in the honey value chain to become a member of the MSP. For example, the Facilitators were recommended to SNV BOAM by GTZ, with whom they previously worked extensively (*interview*). Others heard about the CG through the EHBPEA and decided to join (e.g. *interviews*). Apparently, an influential association like the EHBPEA is instrumental in inviting new (relevant) members to the MSP. In addition, other organisations also introduce new organisations to the CG, such as the Holeta Bee Research Center (HBRC) which invited a local NGO (*interview*).

(b) Access to new professional organisations' memberships
The CG has supported some of the participants interviewed to access new professional organisations, such as a processing company, a beekeeping association and the EAB. It seems that the formation of the (regional) EABs and the EHBPEA opened doors to new members (*interviews*). For example, much to its satisfaction ESBA has become the Vice Chair representative of the Executive Committee of a regional EAB (*interview*), while the CG facilitated the EAB itself in becoming member of Apimundia, Apitrade Africa and Bees for Development (*interview*).

Picture: (left) Office and employees of the ESBA (right) Honey labelled by ESBA. Source: first author

(c) Involvement in multiple MSPs
Several organisations are active in multiple MSPs. Next to their membership of the honey CG, they visit CG meetings of the dairy, oilseeds or pineapple chains. Among these organisations are: the Ministry of Agriculture and Rural Development; the Ministry of Trade and Industry; the Chamber of Commerce; several financial institutes and banks; the Holeta Research Centre; several governmental implementing agencies like the Bureau of Finance and Economic Development (BoFED) and SNNPR Micro & Small Trade and Industry Bureau (SNNPR MSE Agency); the Quality Standard Authority of Ethiopia (QSAE); the Consulting Management Business Creation and Development Services (BCaD), as well as two women associations. Most of these organisations focus on the honey CG however. The actors involved in multiple MSPs transfer information and contacts from one MSP to the other to the benefit of the members, and enhance the general networking opportunities for them. In this way they contribute to the effects of the each MSP.

(d) Relations with the government
The apiculture sector was hardly on the government's radar screen, but during the CG process the government of Ethiopia has developed an interest in the honey and beeswax value chains. The Ministry of Agriculture and Rural Development also plays a prominent role in the Ethiopia Beekeepers Association (presidency), played an active role during the process of EU Third Country Listing, and will probably offer a location for the CG meetings after SNV BOAM has phased out. The Ministry of Trade and Industry and the company of the CG chain leader seem to have developed

fruitful relations, which are indispensible in the development of the entire apiculture sector.

(e) SNV BOAMs network
SNV BOAM is not the sole donor involved in the VCD approach, but is embedded in a broader international development network. The most prominent organisations with value chain development programmes are the German GTZ, Oxfam GB, and the Royal Netherlands Embassy (RNE), which supports the dissemination of best practices among donors, government institutions and practitioners. The government of Ethiopia has adopted the sectoral and value chain approach. These links of SNV BOAM also embed the CG members in the wider institutional field.

In the social network analysis, the following regarding relations established with the government were confirmed:

- The Ethiopia Beekeepers Association (EBA) as well as the Ministry of Agriculture are among the central network players in the honey CG, confirming high actor involvement and representation of the public sector in this CG (*Appendix 6*).

The honey CG is fairly embedded in inter-organisational relationships. Interactions with third parties are evident, resulting in multidirectional information flows facilitated through the identified brokers of the network. Genuine involvement of the government as a key player in the honey network was confirmed in the network analysis. The MSP has been supportive in creating linkages between public- and private sector and civil society, reflecting representations arrangements. Finally, linkages of SNV BOAM also embed the CG members in the wider institutional field.

3.3 Involvement
In this case study, the intensity of actor involvement was assessed through (a) individual/sector representation in the CG and (b) participation in CG-related committees. The findings were verified in the social network analysis.

(a) Representation
The majority of the interviewees (83 %) state that the important honey and beeswax stakeholders are represented in the honey CG (*Table 9*). Some interviewees added they would like to see more stakeholders from the regions, such as (regional based) exporters and the regional bureaus of agriculture and the Quality and Standard Authority of Ethiopia (QSAE) who participated in the beginning (*interviews*).

The lack of government involvement is a specific issue that SNV BOAM considered from the outset. The Mid Term Review (Aleme et al. 2008) states: "involvement and commitment from the public sector is crucial in order to achieve the strategic objectives of the BOAM programme. The public sector is already involved (mainly in the honey CG) and experienced the positive effects of the BOAM approach and is interested to continue with the practical relation. The rejection of the public development program[35] however hinders the development of better and more

[35] The public component of the BOAM program (to be implemented by the Bureaus of Finance and Economic Development (BoFEDs) never took off (source: Mid Term Review, 2008)

structural relationships. More importantly, the connection with the higher forums and senior management of relevant public agencies and departments needs to be structured for which new arrangements are necessary". Although key government agencies are well represented, some interviewees explicitly deplored the absence of *key decision makers* of government and financial agencies because they could significantly help solving the problems in the apiculture sector (*interviews*). However, during the CG process the government of Ethiopia has started to develop an interest in the apiculture sector.

Table 9. Representation honey CG

Representation	Frequency	Percentage (%)
Complete	10	83
Not complete	2	17
Total	**12**	**100**

Source: interview data

(b) Participation in CG related committees

The establishment, membership and participation in (steering, ad hoc) committees, Boards and working groups are indicators of actor involvement as well. In the honey Coordination Group meetings several (spontaneous) committees, Boards and groups were formed, such as the Quality Working Group (including a.o. the MoA, MOTI, two research centres, QSAE, the EHBPEA, and consultants and experts provided by SNV BOAM) that was successful in adding Ethiopia to the list of countries which have approved residue monitoring plans. The CG also established the EAB, which proved itself successful in taking over the sector-wide facilitating role of SNV BOAM. Furthermore, two Ad Hoc Committees were established (for boosting production and to find solutions for quality problems in apiculture sector such as adulteration[36]), as well as the Executive Committee for the approval of concept notes. However, the latter "already finished before it properly started as funds were finished" (*interview*). But, altogether, the honey value chain MSP generated a high rate of successful sub-organisations.

The social network analyses on sector representation and central network players generally support these findings (derived from *Appendices 5 and 6*). In *Table 10* and *11* respectively the sector representation in the honey CG and the number of central network players from each sector are represented. Finally, in *Table 12*, the central network players per stakeholder role in the honey value chain are displayed.

Table 10. Sector representation in the honey CG in percentages (%)

Sector	Private sector	Public sector	Education	Civil society	Unknown
Honey	55,9	18,9	5,5	18,1	1,6

[36] 50 % paraffin adulteration in beeswax or honey (CG4 meeting minutes).

Table 11. Top-10 central network players in the honey CG per societal sector

	Honey
Private	6
Public	1
Civil Society	2
Education	1
Total	10

Table 12 Top-10 central network players per stakeholder role in the honey value chain

	Honey
Actor	4
Supporter	1
Influencer	3
Facilitator	2
Total	10

From the network analysis, the following was confirmed:

- SNV BOAM's private sector approach is evident; the majority of the participants in the honey value chain CG represent private sector organisations (*Table 10*). Moreover, more than half of the central network players are representatives of the private sector (*Table 11*). ;
- All stakeholders' roles in the value chains are represented in the lists of central network players of the honey CG (*Table 12*). This indicates that value chain roles (chain actors, -supporters, -influencers and - facilitators) of the whole chain approach are represented in the networks;
- Financial organisations (i.e. banks, MFIs) are absent as central network players in the honey CG (*Appendix 6*).

Table 13. Honey CG Ethiopia: internal and external dynamics

Internal dynamics	
I. Collaboration	
1.1 Engagement	
Commitment	Medium-High. Nucleus group yes but peripheral group less/no
Motivation	Partly intrinsic; SNV BOAM offers financial and technical incentives (extrinsic). Embedded invitations. DSA not objective in itself
Roles & Contrib.	No, Formal duties and responsibilities not specified
Shared resources	No, but equal access to third (SNV BOAM) funds
1.2 Jointness	
Decision making	Joint. For a limited period, stakeholders had a say in honey allocated funding. Equal opportunity to speak out for all.
Leadership	Strong Chain Leader and leading associations with sector-wide vision. Ownership in sector created.
Selection stakeholders	Leading Trio of CG Leader, Chain Facilitator, & SNV BOAM
Agenda setting	Leading Trio of CG Leader, Chain Facilitator, & SNV BOAM. Influencing agenda by others cumbersome.
Benefits distribution	Benefits depend on capability to articulate interests, and capabilities not equally distributed among members
Risk sharing	No risk members – not relevant
1.3 Transparency	
Accountability	Accountability mechanisms absent. Forms of informal accountability present.
Trust-building	Yes; CG very effective as new meeting place and improved trust among actors in and along the chain. More transparency among who is and who does what.
1.4 Goal alignment	
Objectives clear	Yes, SNV BOAM created MSP that is highly export-oriented. They heavily supported a prominent export company, promoted the producers/export organisation and then established the CG. Common CG objectives were specified ex-ante.
Win-win	In principle. Win-win opportunities are equal but members need capabilities to gain from MSP, and some more capable then others
Compelling case	Yes. Government was not active and private sector could not organize the honey chain. NGO successfully facilitated tri-sector approach
II. Embeddedness	
Link to CG	Yes, pre-existing links with other organisations helped to find new participants
Member new org	Yes, CG helped several organisations to get linked to new professional organisations
Multiple MSPs	Yes, several members involved in other (BOAM) MSPs. This improves network opportunities for CG members.
Relations with government	Yes, CG attracted government's attention to the honey sector which they used to neglect.
SNV BOAM embeddedness	Yes, links SNV BOAM also embed CG members in wider institutional field
III. Involvement	
Representation	Complete, all stakeholders are represented in CG. But more regional reps desired, as are governmental decision-makers.
Participation CG sub committees	Yes, CG generated a high rate of successful sub-organisations.
External dynamics	
IV. Institutions	

Access to knowledge	Yes in respect of training, awareness quality issues, information on beehives. No in respect of making available new means of production.
Access to capital	No, no changes achieved. Financial organisations offer no accessible loans. Major limitation effects CG. Increased attention to sector (and government interest) may improve creditworthiness honey chain actors.
Access to markets	Yes. New export opportunities to EU (partially CG) and shift to foreign markets. CG rides wave of high international demand, which is biggest cause for tripling of prices. Main market (90%) remains local crude honey market for tej (honey wine) making. Due to high demand, honey markets become supplier-driven. Negative: • Ethiopia still lacks accredited certification body and a testing lab; • No change in policies, eg on adulteration, prohibition living bee colonies, and land issues.
Access to (third) organisations	Partially. CG helped several organisations to get linked to new professional organisations, but others not.

4. Institutional change

This chapter elaborates on the CG's external dynamics, the institutional changes in the value chain's business environment brought about by the CG. We address the question to what extent the CG has been effective in improving the conditions for upgrading for farmers and SMEs in the honey and beeswax value chain, in the perception of the interviewees. The focus is on opportunities for value chain actors to acquire knowledge and technology, capital or credit, opportunities to stabilize markets, and to become part of professional associations.
Table 14 presents an overview of perceptions by knowledgeable interviewees.

Table 14. Perceived changes in the institutional environment, in % and number of interviewees

	-	%	+/-	%	+	%	Total
4.1 Access to knowledge and technology							
Training in beekeeping	0	0	1	9	10	91	11
Farmer awareness on quality	0	0	4	36	7	64	11
Availability of new beehives	2	20	3	30	5	50	10
Availability of new bee colonies	4	44	4	44	1	12	9
Reduction in adulteration	4	50	1	13	3	37	8
Shift mainstream to specialty honey	7	78	1	11	1	11	9
4.2 Access to capital	-	%	+/-	%	+	%	Total
Willingness banks/MFI's to finance	9	90	1	10	0	0	10
4.3 Access to markets	-	%	+/-	%	+	%	Total
Shift domestic to export honey	0	0	2	18	9	82	11
Increased prices paid by buyers	3	27	5	46	3	27	11
4.3 Access to organisation	-	%	+/-	%	+	%	Total
Access to organisation	5	45	1	10	5	45	11

- No effect of CG -/+ Limited positive effect of CG + Considerable positive effect of CG

4.1 Access to knowledge

Access to knowledge refers to market, technical, or organisational information that value chain actors can acquire either by themselves or by hiring affordable service suppliers. To what extent have the CG meetings facilitated honey chain actors in their access to such knowledge? Has the CG been indispensible in this respect?

The honey chain stakeholders pointed to information sharing during the CG meetings. In this way stakeholders received information on, for example, queens rearing, type of beehives, the bee colony market, and multiplication of bee colonies (*interview*). This contributed to the popularisation of higher production intermediate beehives (*interview*). Others confirmed their access to technical knowledge had been improved through trainings, for example on general beekeeping management (use protective clothing, the transfer of bee colonies, or capacity strengthening of the organisation) provided to them (e.g. *interviews*). This is to be considered an indirect effect of the CG, since it is the general SNV BOAM programme that delivered the funding for the trainings. Nevertheless, it is through the CG that stakeholders meet with their potential Business Development Services (BDS) providers. For example, the Holeta Bee Research Center received an increasing number of requests for advice and training during the meetings (from trainers, advisors, processors, and NGOs) and their service work expanded considerably (*interview*). The central role of the Bee Research Center was confirmed in the social network analysis. Due to SNV BOAM funding, the Cooperative Union, two NGO's, and three processing companies interviewed were able to provide trainings to their members and/or supply them with for example protective clothing, and intermediate or modern beehives (*interviews*). Other perceived CG effects are increased farmer awareness on quality, the availability of new beehives and the upgrading of research in the apiculture sector in Ethiopia in general. Less positively evaluated is the contribution of the CG in making available new bee colonies, reducing honey adulteration, and shifting from mainstream to table/specialty honey.

A few interviewees placed critical notes concerning the durability of CG interventions. They expect that technical, financial, and organisational service support will remain necessary for the apiculture sector in the future, but that is uncertain after SNV BOAM has phased out (*interviews*). Moreover, "although CG members receive information on proper technology, there are no means to access the expansive technologies" (*interview*). For example, the availability of modern beehives has increased; however, it will have a limited effect as "credit to buy the expansive (modern) beehives is still lacking and proper bee management techniques remains scarce" (*interview*). Traditionalism in beekeeping therefore remains high (*interview*). However, the introduction of the cheap transitional beehives by Holeta Bee Research Center and the CG will improve productivity.

Picture: backyard beekeeping and beekeepers women's association in Akaki Kaliti, Addis Ababa. Source: author

4.2 Access to capital

Access to capital involves the possibilities for honey value chain actors to acquire a credit, loan or budget for their commercial activities. Access to capital was assessed through interest rates, duration, collateral requirements, pay-back conditions, and characteristics of the funding organisation. It was also verified whether the CG was indispensable in influencing the stakeholders' opportunities to access capital/credit.

In Ethiopia, Banks rarely lend money to small scale suppliers, and farmers have only access to MFI's and informal lenders. The MFI interviewed provides off-farm loans, semi-farm loans, farm-loans and lease financing. According to the manager, interest rates vary from product to product, but at the time of harvest (once a year) farmers can receive loans against a 15 % interest rate per month.

Access to capital/credit was therefore a point of discussion in the honey CG, and access to inputs and finances was identified as one of the Strategic Intervention Plans (SIPs). Banks and MFIs were invited to the meetings, but their participation was limited and not a sufficient condition for a change in their policy (*interviews*). In the beginning of BOAM there were discussions on whether or not to include loan guarantees in the programme; however donors of SNV BOAM were not willing to finance that. Main problems are that the Ethiopian financial sector is heavily state regulated, even for the private farms, and that agriculture is seen as a high risk investment. Insurance opportunities against crop failure are absent.

Honey prices are dependent on region, but to give some indication on the price increases in the apiculture sector the researchers found that Adama honey was sold for 15-20 Birr/kg, whereas it is currently sold for 50-80 Birr/kg. Moreover, Tigray good quality (white) honey from modern beehives increased from 25-30 to 160 Birr/kg (*interviews*). In Sheka, honey was sold for 3-4 Birr 5 years ago, although currently a private processing company buys for more than 30 Birr/kg (*interview*). Finally, in Masha zone, good quality white honey was sold for 9 Birr/kg in 2005; whereas it is currently (2010) 22-25 Birr/kg (*interview*). Interviewees point out to inflation as the main reason of the price jump.

The CG has not been able to improve access to credit/capital in the honey sector. Nine out of ten interviewees with whom the issue was discussed said the CG did not positively affect the willingness of Banks and MFIs in Ethiopia to lend any money to stakeholders in the honey value chain (*Table 14*). So far, the credits have been "untouchable" (*interview*). SNV BOAM confirms the lack of results in this respect and also the implications for the durability of the CG activities. "This is probably a limitation of the program: how will the finance continue if there is no access to credit facilities?" (*interview*). Two honey chain organisations managed to obtain loans recently, the EAB and the CG Leader's processing company, but their opportunity can only partly be attributed to the CG (*interviews*).

Despite of the lack of concrete results, there are some indications that the CG is starting to contribute –indirectly- to some minor changes in the financial environment of the apiculture sector. Due to increased attention to the sector created by the honey CG, donors are now more willing to finance CG member organisations (*interview*). For example, the positive image of HBRC, built with SNV BOAM support, gives the Center better access to funds (*interview*). There is also "green light" for the apiculture sector's inclusion in the governmental credit priority sectors (*interview*). If the government will take over the funding of the Residue Monitoring Plan (RMP), and there are several indications they will indeed do so, this would be an outcome of improved access to finance (*interviews*).

Recapitulating, perhaps one of the major shortcomings of the honey CG is the little progress that was booked on honey value chain stakeholders' access to affordable credit/capital; nevertheless, the increased attention to the sector might positively affect the financial climate and overall creditworthiness of the apiculture sector.

4.3 Access to markets

Access to markets was examined by gathering information on prices, and buyer and farmer commitments (advance payments, contractual arrangements, quality standards, and alternative market opportunities). Several changes in the apiculture sector market are positively related to the CG in the perception of interviewees. Firstly, all 11 interviewees who were asked about the issue of market access believed the CG had effectively promoted the shift from domestic to export honey; nine interviewees believed the effect was considerable (*Table 14*). A major success was the opening of the international honey market when the CG's Quality Working Group managed to have Ethiopia registered in the EU Third Country Listing. Registration is conditional for the import of any product of animal origin into EU countries. This success attracted many other honey processors to the meetings (*interview*). SNV BOAM was reluctant to attribute the registration to the CG only, however.

Secondly, SNV BOAM funds have proved useful for making available information on markets and certification. For one interviewee the CG "helped identifying who is working on what in the honey sector" (*interview)*. Others used the funds to finance, for example, experience-sharing visits and/or participation in international trade fares (e.g. Dubai Gulf Food Trade Fare in 2009 and 2010), or for the facilitation of HACCP certification (*interviews)*. Some respondents attributed these results explicitly, but indirectly (visits abroad were funded by SNV BOAM) to the existence of the CG (*interviews*).

Thirdly, the prices in the Ethiopian honey sector have tripled in the past five years (see *textbox*). The majority of interviewees believed the CG has had a (limited) positive effect on increased honey prices paid by buyers (*Table 14*), probably because of increased quality awareness (*interview*). Several interviewees believe that suppliers rather than buyers determine prices, due to the high (international) demand in the apiculture sector. As some beekeeper women put it: "since our honey is organic and pure, everyone is willing to pay the price we offer (*interview*).

Fourth, the CG created awareness among beekeepers about export possibilities and the market value of honey. From the CG meetings the cooperatives learned "'they can make good money from honey production as long as the quality of the products is good". This resulted in increased prices paid for the honey since the considerable demand enables beekeepers shifting to other buyers. As such, "the CG contributed to a reduced dominance of the local buyers" (*interview*). Further, "beekeepers were not aware of the value of beeswax. They even threw it away in the production process. Now they appreciate its value" (*interview*).

Fifth, the honey CG successfully served the function of contact platform and enabled the establishment of new **business to business (B2B) relations** (see also *textbox*). A number of interesting examples emerged from the interviews. A recent starting processing company will soon

SNV BOAM aims at delivering B2B support to guarantee that a reliable supply and market outlet is assured. In their opinion, facilitating the development of business relationships and arrangements between downstream traders, processors and farmer organizations on one side and small farmers and their organizations on the other side is essential for business development.
Source: SNV BOAM's value chain approach.

start exporting semi-processed honey to a processor company in Dubai. The company manager met this buyer during her Dubai Fair Trade visit, which was made possible through the SNV BOAM fund. She also contacted the ESBA to share knowledge on bee forage development (*interview*). A second example is the leading processing company that is currently buying modern beehives from Kindu (a modern and appropriate technology and equipment manufacturing centre), whom company representatives meet in the CG meeting (*interview*). Another example is the NGO Ratson which contacted the ESBA as a result of the CG meeting for the input supply of new bee colonies near Debrezeit. The NGO also received technical advice from a technical consultant in the apiculture sector (EBA) (*interview*). Finally, through the CG, processing companies are linking with local governmental administrations to select the beekeepers that can receive the trainings funded by SNV BOAM (*interview*).

Less positively evaluated is the inability of the CG to successfully address the lack of a proper certification body in Ethiopia. Producers have to comply with the Ethiopian Quality Standards for honey, beeswax and beehives, which are equivalent to the Codex Standard (EU/FAO/WHO). But this government body is not internationally accredited to certify honey products (*interviews*). Also a testing laboratory is absent in Ethiopia (*interview*). Certification can only be done abroad and handled through the Ethiopian Honey and Beeswax Producing and Exporting Association (EHBPEA). Despite this complicated process, seven Ethiopian honey companies have managed to become ISO9001 & HACCP certified *interviews*).

No change was perceived in contractual arrangements. Very few formal contractual agreements exist between buyers and suppliers, although that is particularly a problem for *buyers* who require a guaranteed supply of quality honey. Beekeepers usually sell to local merchants as they pay them directly, and for higher prices than processors, reportedly because merchants do not pay tax and resell adulterated honey. Neither did the CG address the absence of advanced payments for honey producers. But, as beekeepers have sufficient alternative market opportunities, the need for such arrangements is less urgent from their side.

Although several interviewees have indicated that the CG could "push the government to take action", the CG has hardly been successful in changing a number of important market policy issues. Little has changed in the governmental policy in respect of mandatory quality standards (e.g. on adulteration or prohibition of import of living bee colonies), or on illegal trading (e.g. *interviews*). Discouraging land restricting policies and financial systems also remained largely unaddressed. On the other hand, the EAB, established in the CG, is currently negotiating with the government to reduce the VAT on honey export products from 30 to 15 percent (*interviews*).

4.4 Access to organisation

As already discussed in *section 3.2*, the MSP has facilitated the access to new professional organisations' memberships for some of the stakeholders interviewed, such as processing companies, beekeeping associations and the EAB. Five out of the 11 respondents to this question believed the MSP did not contribute to linking to new professional organisations at all; five others are positive in this regard. One CG member believes that "no access to organisation was created as a result of the CG (*Table 14*), although the presentations in the CG meetings do give new ideas on

Ethiopian honey sector successes

- Honey production has expanded with more than 60% in four years time, from 24.600 tons in 2004/05 to 39.660 tons in 2008/09;
- The price of honey quadrupled in the same period, from ETB 4.00-5.00 to ETB 18.00-20.00 per kg;
- The productivity tripled, from 5-6 kg with traditional beehives to 18-20 kg with modern beehives;
- The first high quality Ethiopian table honey was exported to the European market in 2008;
- The export of honey reached a value of US$ 1,9 million, and beeswax US$1,6 million in the last Ethiopian budget year (2009/2010).

Sources: MinBuZa, 2010; *pers. comm.* MOTI, August, 2010

[redacted]

organisations willing to partner" (*interview*). Finally, the formation of the (regional) EABs and the EHBPEA opened doors for new members.

General successes in the honey sector are presented in the textbox.

5. The future of the honey CG

With the interviewees we discussed the future outlook of the MSP. The common feeling was that the CG has been an effective meeting place that played an important role in identifying policy gaps and major problems in the honey value chain. This function is likely to be sustained. The honey MSP has developed the capacity to work for itself, or as one interviewee puts it: "if a baby starts walking, it will soon start running" (*interview*). The Chain Leader of the honey CG is confident that the CG will continue to make a difference, especially since the CG has become more influential now governmental delegates are involved (*interview*). On the other hand, reduced SNV BOAM funding will probably result a lower number of participants and less meeting facilities (only half a day, no lunch).

The question is to what extent the phasing out of SNV BOAMs involvement will affect the Ethiopian Apiculture Board (EAB). The EAB is taking over many of the CG's functions as a legal entity that has already established regional branches close to the beekeepers and cooperatives. Some interviewees are concerned whether the young EAB is strong enough to ensure its continuation (*interviews*). Others point to EAB's proven ability to attract donor subsidies for its activities. The regional boards already receive some financial support from the government and a meeting hall is promised as future meeting place by the Ministry of Agriculture and Rural Development.

6. Conclusions

This honey and beeswax case study assesses the effects of the honey multi-stakeholder platform, the Honey Coordination Group (CG) that was established by the NGO SNV in 2005 to improve the access to (quality) markets for stakeholders in the Ethiopian honey and beeswax value chains. Up to 127 organisations participated in at least one of the 18 CG meetings that were held in the period 2005-2010. To examine the MSP, both its internal, organisational dynamics and its external dynamics, i.e. the changes brought about in key areas of the institutional business environment, were analysed.

The internal dynamics refer to the functioning of the MSP as a platform where actors from three different societal sectors (private sector, government, and civil society) worked together to better link smallholder farmers and SMEs to (international) honey and bees wax markets. Our findings suggest that the CG has met most requirements for successful multi-stakeholder collaboration. The level of engagement of CG members varied considerably, but a nucleus group of participants is highly committed. A large peripheral group rotates frequently and therefore is less informed and less influential. CG members participate out of a combination of intrinsic motivation and financial and technical business support they can obtain from SNV BOAM's broader programme; DSA payment does not seem to have biased motivations significantly.

The honey and beeswax CG sufficiently functions as a horizontal, democratic organisation. On the one hand, the CG operates under leadership of a trio consisting of the CG Leader - the president of a blooming honey exporting company-, the CG Facilitator who is contracted by SNV BOAM, and the SNV BOAM value chain Lead Advisor. They play a key role in selecting and inviting new members, agenda-setting, and preparing the meetings. And despite attempts to create local ownership over some SNV BOAM funds, it is SNV BOAM that eventually decides. This made a number of interviewees stating that influencing the agenda is cumbersome. Due to the difference in capabilities, the distribution of benefits derived from the CG is not entirely equal. Moreover, opportunities to strengthen the CGs democratic reputation are missed because of the lack of formal duties and responsibilities linked to specific roles which prevents the establishment of accountability and commitment measures.

On the other hand, members have an equal chance to speak out, are invited to do so, the transparency of process documents is high, and interviewees believe that consensus is aimed at in decision-making. The contribution of the CG leader, who operates as a *primus inter pares*, is generally highly appreciated. The CG greatly improved transparency in the honey sector in that producers and processors can meet, introduce themselves, and build (trust) relationships. All interviewees see in the CG an important governance instrument for the common interest in the apiculture sector, which was dominated by individual interests in the past.

In the social network analysis the high rotation in the honey CG (60,2 % exits), the central roles of the leading trio (SNV BOAM, CG Leader, and CG Facilitator), the active involvement of the government and SNV BOAM's private sector approach was confirmed.

In respect of the external dynamics, the honey CG is mostly valued for its function as a networking and learning platform, where members can exchange information, meet with potential buyers and suppliers, and where chain actors meet and discuss with chain supporters and influencers. Important is that the CG has managed to convince government authorities to offer more attention to the honey sector and to get the government on board of the CG. In the perception of stakeholders, this is one of the major constraints to the development of the sector. Although successes in addressing key legal and policy issues affecting the apiculture sector have been limited so far, quality standards and illegal trading are now at least on the political agenda. In general, the honey CG has been successful in addressing the major constraints stakeholders experience in the honey value chains.

The majority of the interviewees say the CG has improved their access to knowledge and technology, even though not all new techniques available are affordable. The Holeta Bee Research Center is the leading research institute that has attracted an increasing number of requests for advice and training. The CG has also been supportive in raising awareness on quality issues and on the market value of honey and beeswax abroad, and the platform helped opening up the international market for Ethiopian honey. The CG contributed to the EU Third Country listing as well as to the approval of the residue monitoring plan, and both worked as a catalyst for further engagement and involvement of the Ethiopian government.

Not successful has the CG been in improving access to credit and loans for farmers and SMEs, another major constraint to the development of the sector in the eyes of stakeholders. After five years of meetings, little has changed in this respect. The increased public attention to the sector might in due course positively affect the financial climate of the apiculture sector however.

Overall, the dominant impression interviewees gave is of a honey and beeswax CG that has positively contributed to the development of the Ethiopian honey and beeswax value chains. However, a final assessment requires closer consideration of three important issues. First, evaluative research of interventions always should address the problem of attribution. In the case of the honey CG: how much of the improvements in the Ethiopian honey sector can be attributed to the CG activities, relative to other policies from SNV BOAM and other organisations in the sector? It goes without doubt that other policies and programmes have been instrumental as well. Judging by the overall perception of interviewees, the value-added of the honey CG has been its function as an adequate platform for social capital creation: meeting, exchanging information, trust building, and networking. In this way the CG could cross-cut through all other programmes.

The second attribution issue is related to market developments. How much of the honey sector success is related to the CG and other SNV BOAM interventions, relative to the market demand for honey? Obviously the global increase in demand for honey has been the most important factor. Even though the far majority of Ethiopian honey is consumed locally for *tej* making, the international market absorbs an increasing part of the local produce. It is significant, and somewhat unusual for an agricultural crop, that demand exceeds supply to the extent that the honey market temporarily carries the characteristics of a suppliers-driven chain. The honey CG could thrive well in this environment. On the other hand, the CG was established at the right time, enabling Ethiopian producers to ride the new wave in the international market. Due to the honey CG and other NGO interventions, the

Ethiopian honey and bees wax sector has been able to organize and prepare itself, and to exploit the new opportunities.

Finally, to what extent did the internal dynamics influence the external dynamics of the CG? The CG reasonably met the majority of collaboration requirements, which enabled the platform to facilitate social capital formation in the fragmented honey sector. The CG enabled stakeholders from all three societal sectors to participate in a new, loose governance structure that tackles obstacles to the development of honey and bees wax value chains. The strong export-orientation of the CG, secured by the selection of a prominent honey processing and exporting firm as CG leader; a nucleus group of committed stakeholders that gave the CG a critical mass; a fairly horizontal discussion structure and financial compensation for travel and accommodation costs that makes the CG a rather inclusive platform; and the gradual embeddedness with government authorities that previously had little interest in the sector, these are all internal dynamics that can be considered as conditional for effectively addressing constraints in the institutional environment of the honey business. Poor results in the internal organisation of the CG had almost certainly resulted in more limited external achievements.

7. Limitations

As is the inherent problem with any investigation of short duration into a complex subject, choices had to be made regarding **what to take on board and what not**. We experienced a challenge to separate the impact of the multi-stakeholder platform on any changes in the institutional business environment, apart from the SNV BOAM programme as a whole or from any other (policy) interventions. Especially when organisations already have established long term relationships with SNV BOAM, the clear cut distinction between services provided by SNV BOAM or through the CG is not easy. This **'attribution problem**' is a limitation. It was crucial that we remained consciousness on this challenge during all the interviews by probing and making assumptions explicit; however –as expected- some interviewees remained having troubles in making this distinction. In addition, it was questioned whether, for example, the acquired technology services or credit services were being made available from 'inside the chain' (by chain actors) or 'outside the chain' (e.g. chain supporters).

Second, during the field work the researchers operated in close collaboration with SNV BOAM and were partly dependent on SNV BOAM for their selection of interviewees. Though this substantially facilitated logistics and minimized non-response, such embeddedness holds the risk of **losing independency** in the eyes of interviewees. Organisations might shy away from reflecting critically on the pineapple CG as they fear the continuity of their good relationship with SNV BOAM. To avoid bias, a stakeholder exiting the CG as a result of a conflict was explicitly incorporated in the interview sample. Furthermore, the researchers constructed a list of relevant stakeholders in advance to ensure independent sampling. Finally, in the beginning of each interview the independent status of the researchers was emphasized.

Finally, the **political context** of Ethiopia was not explicitly taken into account in the primary (interviews) and secondary data collection (desk review), despite its importance in understanding how MSPs are organised and functioning. There is no genuine multi-party democracy and tensions and pressures in Ethiopia's polities are growing according to the International Crisis Group report (2009). Furthermore, Human Rights Watch research (2010: 4) reports that "development aid flows through, and directly supports, a virtual one-party state with a deplorable human rights record" and that "the government has used donor-supported programs, salaries, and training opportunities as political weapons to control the population, punish dissent, and undermine political opponents—both real and perceived. Local officials deny these people's access to seeds and fertilizer, agricultural land, credit, food aid, and other resources for development". The researchers have not researched the impact of this political situation on the data found.

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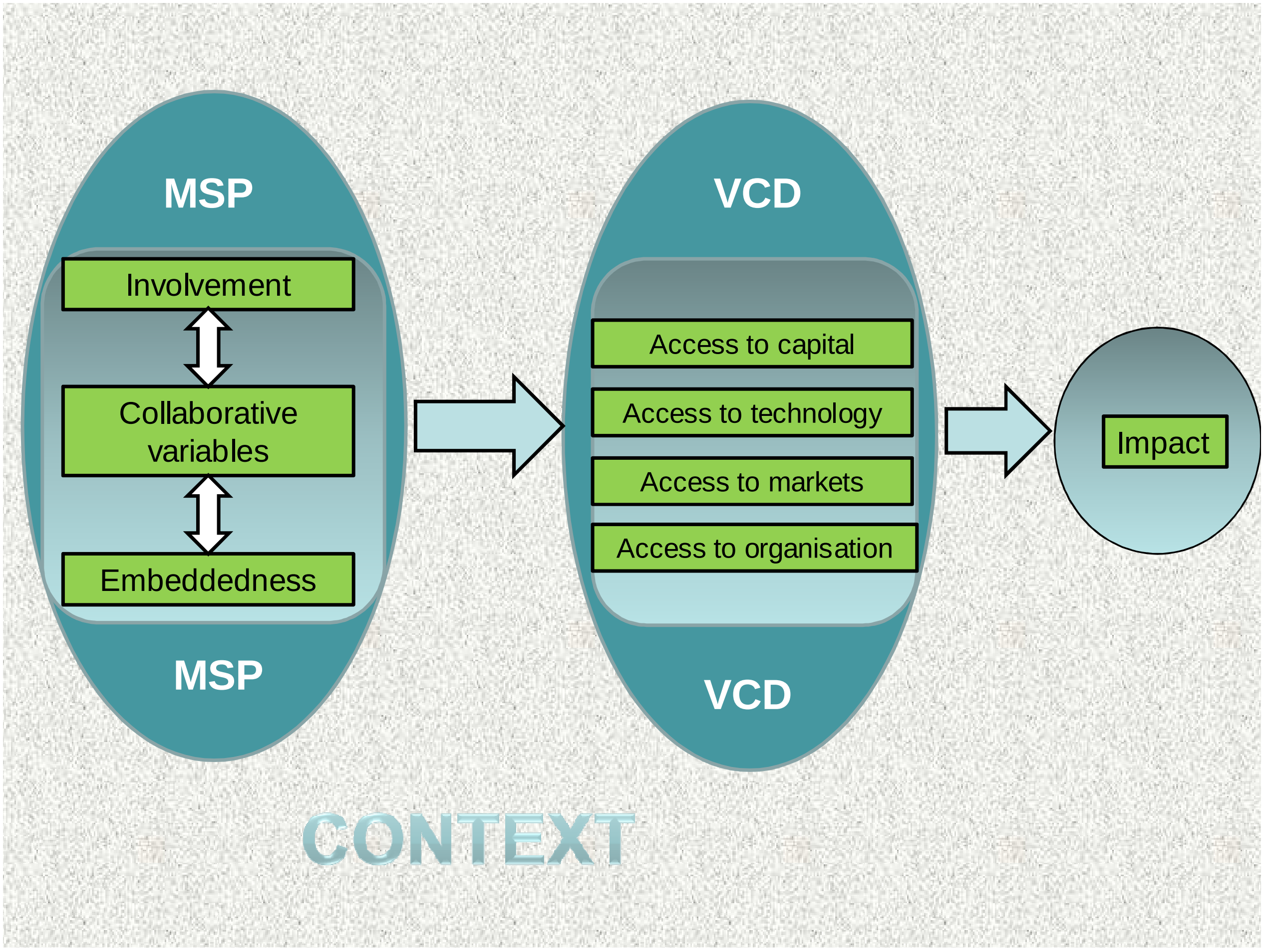
9. Appendices

Appendix 1: Theoretical model



Appendix 2: Roles of various stakeholders

Source: (based on) Hans Posthumus Consultancy, 2008

In general we distinguish four types of stakeholders:

1) Chain actors

Chain actors are the prime stakeholders who, at some point in the chain, own the product that is being created. They commonly buy a semi-finished product from chain actors upstream, add a certain value to it, and sell the enhanced product to buyers downstream. In the research farmers, producer firms, cooperatives, processing firms, collectors, traders, exporters etc. are included.

2) Chain supporters

Chain supporters are those that are outside the chain. They supply goods or services to the chain actors, often they are distinguished as either financial providers (e.g. banks providing loans) or non-financial service providers (e.g. accountants or transporters). In the research consultants, BDS providers, quality and standard institutes, microfinance, banks, funds (IMF), and agricultural research centers (not only temporary, but years of input, extension services, seed inputs etc.) are included.

3) Chain influencers

Chain influencers are those that influence the performance of the sub sector, its actors and their supporters. They influence the entire sub sector (and beyond) without performing an actor or supporters role: influencers (such as the ministry of commerce) determine (partly) the factors (such as investment climate). In the research business representative associations, Ministries, Chamber of Commerce, media, government implementing agencies (e.g. Cooperative Bureau, BoFED etc.) are included.

4) Chain facilitators
A temporary (catalyst) role by an organisation (often a donor funded project) to "grease" the chain machinery, either between the actors at the various levels or between the actors and their supporters, with objective to improve the performance of the entire chain and its actors (also commercially). Often NGOs with donor funding that finance a diversity of capacity building activities. In the research SNV BOAM, NGOs, University, and multilateral agencies (UN, WB) are included.

CODING FOR EXCEL

1=chain actor, 2 = chain supporter, 3 = chain influencer, 4 = chain facilitator

Appendix 3: Interview schedule/ List of Interviewees

General

June 9 & 10, 2010	**Orientation visit**[37]: Mr. Marc Steen, National Portfolio Coordinator and Head Value Chain Development, Mr. Piet Visser, learning coordinator for VCD and Mr. Mugessie Fikri, Monitoring & Evaluation and Documentation, SNV BOAM Ethiopia, Addis Ababa
August 12, 2010	**Discussion Group**[38]: SNV BOAM Ethiopia staff: presentation research and discussion with Mr. Piet Visser, learning coordinator for VCD and Lead Advisor pineapple chain, Mr. Carlo Kuepers, Lead Advisor honey chain & Senior Advisor Market Linkages & Value Chain Development, Mr. Mugessie Fikri, Monitoring and Evaluation, Mr. Yohannes Agonafir, Lead Advisor oil seeds chain, Mrs. Mahlet Yohannes, Lead Advisor dairy chain, Nicholas Nyathi, program coordinator PSNP Plus program, Meskerem Shifera, BDS Development and Elenie Abraham, junior advisor, oil seeds and VCF
September 9, 2010	**Short progress discussion** with SNV BOAM staff: Mr. Piet Visser, learning coordinator for VCD, Mr. Juergen Greiling, Senior Advisor Agroprocessing, Mr. Mugessie Fikri, Monitoring and Evaluation, Mr. Yohannes Agonafir, Lead Advisor oil seeds chain, and Meskerem Shifera, BDS Development
November 8, 2010	**Clarification** meeting and feedback from Mr. Piet Visser, learning coordinator for VCD and Lead Advisor pineapple chain

Honey Value Chain

August 13, 2010	**19th Coordination Group Meeting** of Honey Value Chain
	Interview 1: Mr. Endale Ardu, Manager, Bench Maji Cooperative Union
August 16, 2010	**Interview 2**: Mr. Ghirma Moges, Managing Director/private consultant Quality and Safety Standards,

[37] By Mr. Jeroen van Wijk (MSM) at SNV BOAM head office (Addis Ababa).
[38] By Ms. Sarah Drost (MSM) & Mr. Fenta Mandefro Abate (Addis Ababa University) at SNV BOAM head office (Addis Ababa) (continuing for all interviews).

	Chemtest Consulting, Interviewed for his role in the honey and oil seeds value chain
	Interview 3: Mr. Daniel G/Meskel, Managing Director, Comel PLC
August 17, 2010	**Interview 4**: Mr. Gezahegn Tadesse, Senior Apiculturist and Livestock Expert of the Ministry of Agriculture (MoA) & president of the Ethiopia Beekeepers Association (EBA)
	Interview 5: Mr. Ayalew Kassaye, Technical Auditor contracted by SNV BOAM Ethiopia and vice-president of the Ethiopia Beekeepers Association (EBA)
August 18, 2010	**Interview 6**: Mr. Abu Negesso, chairperson, and Mr. Tilahun, Abebe vice chairperson of the East Shoa Beekeepers Association (ESBA)
	Interview 7: Mr. Wubshet Adugna, Manager, Apinec Agro-Industry PLC
August 19, 2010	**Interview 8**: Mr. Tamiru Wubie, Research and Advocacy Specialist, Ethiopian Chamber of Commerce Sectoral Association (ECCSA). Interviewed for all value chains under study (oil seeds, pineapple, dairy and honey). For honey in his former position in the Addis Ababa Chamber of Commerce Sectoral Association (AACCSA)
	Interview 9: Mr. Befekadu Refera, Program Coordinator, Melca Mahiber (Ethiopian NGO)
August 20, 2010	**Interview 10**: Mr. Carlo Kuepers, Senior Advisor Market Linkages & Value Chain Development, Lead Advisor honey value chain, SNV BOAM Ethiopia
	Interview 11: Mr. Juergen Greiling, Senior Advisor Agroprocessing, Lead Advisor (partial) honey value chain, SNV BOAM Ethiopia
	Interview 12: Mr. Nuru Adgaba, Apiculture Researcher, Holeta Bee Research Center (HBRC)
August 23, 2010	**Interview 13**: Mrs. Rahel Tamrat, Managing Director, Rahi PLC

	Interview 14: Mrs. Menbere and Mrs. Tsegye Mendaye, beekeepers, Addis Ketama Beekeepers Association (field visit)
	Interview 15: Mr. Haile Giorgis Demissie, Managing Director, Beza Mar Agro Industry, president of the Ethiopian Apiculture Board (EAB) and Coordination Group Chain Leader in the honey value chain Coordination Group
August 25, 2010	**Interview 16**: Mr. Afework Yohannes and Mr. Michael Yohannes, Managing Director, Consulting Management Business Creation and Development Services (BCaD) and Coordination Group Facilitators in the honey, oil seeds & pineapple Coordination Group
August 26, 2010	**Interview 17**: Mr. Zewdie Bekele, project coordinator, Ratson (Ethiopian NGO, also involved in extension services)
	Interview 18: Mr. Tesfaye Befekadu, general manager, Harbu Microfinance Institute

Appendix 4: Questionnaire

Context
Multi-stakeholder platforms (MSPs) are increasingly recognized by researchers and practitioners as promising mechanisms for stimulating economies in developing countries. The so-called chain platforms can help to bring actors, operating directly or indirectly in the chain, together and realise common objectives through dialogue and cooperation. However, systematic research on their effectiveness and impact is scarce. Therefore, SNV BOAM Ethiopia and the Maastricht School of Management (MSM) / Partnerships Resource Centre (PrC) have embarked on a collaborative effort to evaluate a number of MSPs in which SNV BOAM Ethiopia is involved. MSM carries the responsibility for the research and final report.

SNV[39] is a non-profit, international development organisation, with extensive hands-on experience in their value chain approach. MSM's Sustainable Development Center[40] stands for expertise on sustainable economic development in emerging markets. MSM is partner in the Partnerships Resource Centre[41], an open centre where academics, practitioners and students can create, retrieve and share knowledge on cross sector partnerships for sustainable development.

Interview objectives
This questionnaire serves to structure a series of interviews that will be conducted with actors in a selection of value chain Coordination Groups (CGs) in Ethiopa. Selected are CGs in four chains: honey & beeswax, dairy, oil seeds, and pineapple. The interview results will serve as the main input for an evaluation report that is due for 1st of February 2011. The results will be presented and discussed during a workshop in spring 2011.

About the questionnaire
The interview consists of three parts. Section A focuses on the (meetings of the) Coordination Group itself. Section B concentrates on the institutional changes brought about by the CG, whereas the last section C asks about your overall opinion of the CG.

Contact:
For questions and additional information please contact
Ms. Sarah Drost, MSc.
Sustainable Development Center

[39] SNV BOAM Ethiopia: www.SNV BOAMworld.org/en/countries/ethiopia/Pages/default.aspx

[40] MSM - SDC: www.msm.nl/1/1/uk/research/sustainable_development_center/

[41] PRC: www.erim.eur.nl/ERIM/Research/Centres/SCOPE/Partnerships_Resource_Centre/About

Maastricht School of Management
Email: drost@msm.nl

Identification

Name interviewee(s):
Organisation:
Position:
Location:

Interviewer:
Date of interview:
Place of interview:

What are the main activities of your organisation in this value chain?

A Coordination Group (CG)

A1. General introduction
1. What is the main problem in the apiculture/dairy/fruit/oil seeds sector, according to you?

A2. Engagement
2. In what way are you/is your organisation engaged in the CG? (describe activities and roles: e.g., Facilitator, Leader, advisor, member of committee/working group)

3. Since when are you involved in the CG meetings? (reasons for prolonged stay or exit)

4. What motivated your organisation to join the CG? (e.g. daily allowance, influence, networking opportunities?)

5. Do you feel all relevant stakeholders are represented in the CG? Why?

6. How would you evaluate the level of commitment of CG members?
A. Low
B. Modest
C. High
Please explain

A3. CG Governance
7. Do you feel all CG members have an equal say during the CG meetings?
A. Yes
B. No. Who are the dominant members?)

8. Do you feel that all members benefit equally of the CG interventions? (win-win situation or not?
A. Yes
B. No. Who gains most?).

9. Are you generally satisfied with the way the CG meetings are being governed?
A. No
B. Yes, but only modestly
C. Yes, significantly
Please explain. What should change?

[Honey]
H.1 What is your opinion about the Ethiopian Apiculture Board (EAB) and its regional chapters?

[Dairy]
D.1 What is your opinion about the Ethiopian Milk and Milk Products Association (EMMPA)?
D.2 What is your opinion about the Dairy Business Hub Model established in meeting 16?

[Oil seeds]
O.1 What is your opinion about the Ethiopian Pulses, Oil seeds, and Spices Processors Exporters Association (EPOSPEA)?

B Issues addressed by the CG

10. Did you exchange contact information with other CG members? Has this lead to concrete actions/funding/other opportunities in your field of activities?

B1. Access to services
11. Do you require specific information, technology or organisational services, for example to meet quality standards, to increase productivity, or to improve your management skills?
A. No
B. Yes, but only modestly
C. Yes, significantly
Please explain what type of services.

12. Have you been able to acquire sufficient service support?
A. No
B. Yes, but only modestly
C. Yes, significantly
Please explain by whom and in what form?

13. Did the CG improve the availability of these services to you?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly
Please explain.

B2. Access to capital/credit
14. How difficult is it for you to acquire a loan/credit/budget for making investments in your organisation (e.g. through financial institute or through B2B relations).
A. Not difficult
B. Sometimes difficult
C. Very difficult
Please explain.

15. Did the CG influence your opportunities to obtain a loan, credit, or additional budget?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly

Please explain.

B3. Access to markets

(a) Prices

15. How would you evaluate prices paid to the producers in the last 3 years (stability, highness, pre-harvest price set)?

16. Did the CG influence prices (stability and level) paid to farmers?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly
Please explain.

(b) Buyer / producer commitment

17. Do buyers commit themselves to producers to buy their produce in advance of the production cycle (provided that quality conditions are met)?
A. No
B. Yes
Please explain.

18. In case of a contractual arrangement, do you think producers perform well in responding to buyer's requirements in terms of: delivery, punctuality of delivery, quality, and flexibility?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly
Please explain.

19. Do producers have alternative market opportunities? Which ones?
If yes, what are the benefits of these alternatives for producers?

20. Did the CG contribute to improvement of contractual arrangements between producers and buyers?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly
Please explain.

B4. Access to organisation

21. Are you a member of a professional organisation/platform? If yes, which?

22. Did the CG contribute to the formation of this professional organisation?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly
Please explain.

23. Did the CG contribute to your access to your professional organisation?
A. No or almost not

B. Yes but only modestly
C. Yes, significantly
Please explain.

B5. Institutional environment (legal, government policy)

24. Which are the (three) main legal/policy constraints that you have to cope with in the supply chain?

25. Did the CG contribute to solve these constraints?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly
Please explain.

C. Future and overall opinion of the CG

26. In your opinion, has the CG, overall, been a success?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly
Please explain (which are the main successes, failures, weaknesses, strengths)?

27. How could the CG play a bigger role for you? (i.e. really addressing their issue?/partnerships possibilities).

28. Do you feel that CG is recognized as an important governance mechanism by the stakeholders in this value chain?
A. No or almost not
B. Yes but only modestly
C. Yes, significantly
Please explain

29. Future scenario: What are, in your opinion, the future prospects of the CG after the BOAM programme has finished?

30. What would be necessary, apart from the CG, to tackle the problems in your sector?

Thank you for your time and collaboration.

Appendix Questionnaire: Conditions for upgrading (scored by the respondent)

-	No effect of CG
-/+	Limited positive effect of CG
+	Considerable positive effect of CG

Access to knowledge & technology
Availability of new beehives (transitional, modern)
Availability of new bee colonies
Shift from table honey to specialty honey
Training in beekeeping
Reduction of use of pesticides
Reduction of adulteration
Farmer awareness on quality
Other (please fill in)

Access to affordable credit
Banks/MFI's are more willing to lend
Buyer firms (B2B) are more willing to lend
Other institutes more willing to lend
Other (please fill in)

Access to markets
Increase production costs of prices paid by the buyer
Annual purchasing commitments
Shift from domestic to export honey
Other (please fill in)

Access to organisation
Access to organisation (e.g. FBO, forum, representative agency)
Other (please fill in)

Access to institutional (legal, policy) environment
Policy/legal constraints:
Addressed?

Appendix 5: Course ratio honey CG

category frequence of meeting visits	type of organisation			present & stay		present & exit		entry & stay		entry & exit	
	type	number	%	number	%	number	%	number	%	number	%
core visitor	Private sector	0	0,0	0	0,0	0	0,0	0	0,0	0	0,0
	Government	0	0,0	0	0,0	0	0,0	0	0,0	0	0,0
	Education	0	0,0	0	0,0	0	0,0	0	0,0	0	0,0
	Civil Society	0	0,0	0	0,0	0	0,0	0	0,0	0	0,0
	Unknown	0	0,0	0	0,0	0	0,0	0	0,0	0	0,0
total core visitors		0	0	0	0	0	0	0	0	0	0
regular visitors	Private sector	3	2,4	2	1,6	0	0,0	1	0,8	0	0,0
	Government	1	0,8	1	0,8	0	0,0	0	0,0	0	0,0
	Education	1	0,8	1	0,8	0	0,0	0	0,0	0	0,0
	Civil Society	1	0,8	1	0,8	0	0,0	0	0,0	0	0,0
	Unknown	0	0,0	0	0,0	0	0,0	0	0,0	0	0,0
total regular visitors		6	4,7	5	3,9	0	0,0	1	0,8	0	0,0
irregular visitors	Private sector	31	24,4	1	0,8	4	3,1	17	13,4	9	7,1
	Government	11	8,7	1	0,8	4	3,1	6	4,7	0	0,0
	Education	5	3,9	0	0,0	1	0,8	2	1,6	2	1,6
	Civil Society	6	4,7	1	0,8	0	0,0	4	3,1	1	0,8
	Unknown	0	0,0	0	0,0	0	0,0	0	0,0	0	0,0
total irregular visitors		53	41,7	3	2,4	9	7,1	29	22,8	12	9,4
at random visitors	Private sector	37	29,1	0	0,0	4	3,1	10	7,9	23	18,1
	Government	12	9,4	0	0,0	1	0,8	1	0,8	10	7,9
	Education	1	0,8	0	0,0	1	0,8	0	0,0	0	0,0
	Civil Society	16	12,6	0	0,0	2	1,6	1	0,8	13	10,2
	Unknown	2	1,6	0	0,0	0	0,0	0	0,0	2	1,6
total at random visitors		68	53,5	0	0,0	8	6,3	12	9,4	48	37,8
total private sector		71	55,9	3	2,4	8	6,3	28	22,0	32	25,2
total government		24	18,9	2	1,6	5	3,9	7	5,5	10	7,9
total education		7	5,5	1	0,8	2	1,6	2	1,6	2	1,6
total civil society		23	18,1	2	1,6	2	1,6	5	3,9	14	11,0
total unknown		2	1,6	0	0,0	0	0,0	0	0,0	2	1,6
total all categories		127	100	8	6,3	17	13	42	33,1	60	47,2

Honey: category timing of visits
present & stay = present at CG1 and/or CG2 AND CG17 and/or CG18
present & exit = present at CG1 and/or CG2; last visit at CG16 or earlier
entry & stay = first visit CG3 or later; present at CG17 and/or CG18
entry & exit = first visit at CG3 or later; last visit at CG16 or earlier
Honey; category frequency of meeting visits
core visitor = present at all meetings (18)
regular visitor = present at 15, 16 or 17 meetings
irregular visitor = present at least at 3 meetings with maximum presence of 14 meetings
at random visitor = present at 0, 1 or 2 meetings

Appendix 6: Betweenness centrality honey CG

Table 1 Top-10 central players in the honey CG

Organisation	Normalised Betweenness Centrality	Type of Organisation	Subtype	Stakeholder role within VC
(110) SNV BOAM	3.600	Civil Society	NGO / NGO network	Facilitator
(48) Ethiopian Beekeepers Association (EBA)	3.479	Private sector	Business representative body / Association	Influencer
(24) Beza Mar Agro Industry (**Chain Leader**)	3.181	Private sector	Processor / Processing firm	Actor
(63) Holeta Bee Research Center (HBRC)	2.596	Education	Research institute	Actor
(3) Addis Ababa Chamber of Commerce and Sectoral Association (AACCSA)	2.569	Private sector	Business representative body / Association	Influencer
(43) East Shoa Beekeepers Association (ESBA)	2.182	Private sector	Business representative body / Association	Actor
(113) SOS Sahel Ethiopia	2.097	Civil Society	NGO / NGO network	Facilitator
(19) BCaD (**Chain Facilitators**)	1.767	Private sector	Business development service provider	Supporter
(79) Ministry of Agriculture and Rural Development (MoA)	1.494	Government	National government / Ministry	Influencer
(30) Comel PLC	1.404	Private sector	Processor / Processing firm	Actor

Table 2 Central players in honey CG with betweenness centrality> 2

Name	Normalised Betweenness	Type of Organisation	Subtype	Stakeholder role within

	Centrality			**VC**
(110) SNV BOAM	3.600	Civil Society	NGO / NGO network	Facilitator
(48) Ethiopian Beekeepers Association (EBA)	3.479	Private sector	Business representative body / Association	Influencer
(24) Beza Mar Agro Industry **(Chain Leader**)	3.181	Private sector	Processor / Processing firm	Actor
(63) Holeta Bee Research Center (HBRC)	2.596	Education	Research institute	Actor
(3) Addis Ababa Chamber of Commerce and Sectoral Association (AACCSA)	2.569	Private sector	Business representative body / Association	Influencer
(43) East Shoa Beekeepers Association (ESBA)	2.182	Private sector	Business representative body / Association	Actor
(113) SOS Sahel Ethiopia	2.097	Civil Society	NGO / NGO network	Facilitator

Table 3 Central players in honey CG with betweenness centrality > 3

Name	**Normalised Betweenness Centrality**	**Type of Organisation**	**Subtype**	**Stakeholder role within VC**
(110) SNV BOAM	3.600	Civil Society	NGO / NGO network	Facilitator
(48) Ethiopian Beekeepers Association (EBA)	3.479	Private sector	Business representative body / Association	Influencer
(24) Beza Mar Agro Industry (**Chain Leader**)	3.181	Private sector	Processor / Processing firm	Actor