Global Value Chain Governance and Relation between Local Actors in the Burundian Tea Sector

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Received: 18 August 2019 Accepted: 13 October 2019 DOI: https://doi.org/10.32479/irmm.8857

ABSTRACT

In the context of globalization, the success of a firm to sell its products on international and regional markets depends on the type of governance exercised in a given sector. This article mobilizes a theoretical framework of global value chain governance to analyze the type of governance exercised in the tea sector in Burundi. A qualitative analysis of data from a survey of 120 small tea farmers in the Ijenda and Teza areas reveals that control and coordination in the sector is ensured by captive governance. In addition, a stagnation of the price of the green leaf tea over a decade generates a lack of interest in the tea farming out on small farming areas. Only 25% of small tea farmers in Ijenda and 36% in Teza want an extension.

Keywords: Captive Governance, Market Governance, Global Value Chain, Tea

JEL Classifications: O13, O21, P32, P42

1. INTRODUCTION

Globalization and the expansion of international markets have offered producers a wide range of opportunities to market their products both domestically and internationally. This openness to international market puts several sellers in competition, and each seller has to make a rigorous control in the process of production, distribution and marketing to sell high quality products in compliance with quality standards (product certification) and market regulations (Dolan and Humphrey, 2004). Localities, territories and economies with appropriate production and governance systems are most successful in integrating trade in the international arena (Tozanli and Gauthier, 2007).

In developing countries, businesses are small in size (Agarwal and Audretsch, 2003; Nichter and Goldmark, 2009; Panda, 2014), with isolated (Ghauri et al., 2003; Rutashoby and Jaensson, 2004; Chu et al., 2008) and traditional production systems (Tybout, 2000; Steinfeld et al., 2006). The development and evolution of the means of communication and information technologies requires producers to produce and sell products under the quantity/quality duality (Gómez et al. 2011), and producers in developing countries lack the technical capabilities and financial resources to comply with these new requirements (Beck et al., 2005; Beck and Demirgüç-Kunt, 2006; Nichter and Goldmark, 2009; Bloom et al., 2010; Dinh et al., 2010; Wang, 2016; Fowowe, 2017). All these constraints make it difficult for developing countries to sell their products on international markets. Which type of governance is developed by actors of those countries in the chain to produce and market their products on international markets? To answer this question, this article mobilizes theoretical underpinnings of the global value chain (GVC) and illustrates the forms of GVC governance through a case study of the production and marketing of tea in Burundi.

2. LITERATURE REVIEW

2.1. The Commodity Chain (CC) and the Global Commodity Chains (GCC)

The term CC dates back to the late 20th century, when Hopkins and Wallerstein (1977) developed analyses enabling to differentiate
their understanding of the territorial dimension of capitalism from the orthodox approach of globalization. In their macroeconomic conception, these authors do not conceive the development of the globalized economy as a sequential process in which local and national markets gradually take on a global scale due to the openness of the international trade. These sociological authors find rather an inequality in the distribution of the means of production (mainly capital and labour) creating a clear difference in the distribution of added value at the level of geographical areas: the centre, the semi-periphery and the periphery. The concept of CC in its narrow sense is not different from the value chain (CV) in the narrow sense. CC is the set of production processes (raw materials, labour, etc.) that make it possible to obtain a final product (Hopkins and Wallerstein, 1986). The significance of CC is very simple: take a final consumption good and list all the inputs that made it possible to obtain that good - the raw materials, the transformations carried out, the labour used, the intermediate consumption, the transport; this set of connected processes is known as CC. If the final good is a garment - a shirt for example - the chain would include the cotton cultivation, fabric, tissue, thread, etc. necessary in the transformation process including the labour force and equipment involved in these productive activities (Bair, 2010). It is crucial to broaden the understanding of CC rather than to retain it as a mere shift from input to output. The transition from CC to GCC sheds light on the existence of structures linking actors each other at the firm level and across transnational actors at the end of the chain (Bair, 2010).

GCC developed in the 1990s (Gereffi, 1994; Gereffi and Korzeniewicz, 1994), are analyzed through three dimensions: An input-output structure, a territoriality (a geographical area) and a governance structure that describes the way in which some actors exert control/power over other actors (producer-driven chains [PDC] or buyer-driven chains [BDC]) (Raikes et al., 2000; Bair, 2010). The application of the GCC approach in international trade in various fields has raised a lot of interest vis-à-vis the massive industrialization intended for export, especially for the southern countries in the 1980s. The application field of the GCC can be found in all domains of activity: industrial, agricultural, services, etc. Gereffi (1994) applied it to analyze exports of clothes from East Asian countries to the United States of America. Other GCC studies have focused on tourism (Claney, 1998), fresh fruit and vegetables (Raynolds, 1994), and automobiles (Kaplinsky and Morris, 1999), etc.

2.2. The GVC
In the 2000s, the concept of chains aroused questions especially for the term “commodities,” which refers to primary products (raw materials), and the GVC was preferred to GCC as the most inclusive of all the activities necessary to obtain finished products in a globalized context (Gereffi et al., 2001). The GVC is a tool for contextualized analysis of transnational value chains, organized in complex intertwined intra- and inter-business networks in which the hierarchy of activities, the decision-making systems, the power relations and the relations with the territory are profoundly changing (Palpacuer and Balas, 2010). Built on the basis product like the GCC, the GVC is an inter-organizational network that links households, businesses and governments in the global economy (Palpacuer, 2000). The shift from the GCC to the GVC has added a dimension: the socio-institutional context (Palpacuer, 2000; Rastoin and Ghersi, 2010; Temple et al., 2011). The four dimensions of the GVC (input-output structure, territoriality, governance structure and the socio-institutional context) make it possible to accurately understand the strategic and managerial issues of businesses across the national and international sphere and to create value in a sustainable way. The GVC is a robust and most suitable tool for public authorities eager to reorient the socio-economic structure or socio-environmental conditions of their nations (Bair, 2010; Palpacuer and Balas, 2010). The GVC is a systemic perspective because it integrates a variety of facets of VC anchored in globalized socio-economic situations. The old mechanisms of the production process of companies are adapted, reorganized and reoriented. With the integration of the local production into international markets, the GVC approach provides a holistic view of trade (Raikes et al., 2000; UNIDO, 2009).

2.3. The Governance Model of the GVC
Governance is a broad and multifaceted concept that refers to three main models of governance: corporate governance, public governance and territorial governance (Bakkour, 2013). From an enterprise perspective, governance is an essential element in the analysis of VC. Governance in the GVC refers to decision management systems through actors involved in product design, the strategies that underpin management decisions and methods, as well as the systems through which results are assessed (Gibbon et al., 2008). From the same perspective, governance establishes a relationship of power and authority that determines how financial and material resources are allocated across the various links in the chain (Gereffi, 1994). In the GVC, some firms directly or indirectly influence the organization of production (the goods to be produced, the specification of procedures, norms and standards to be respected, etc.), logistics and marketing systems, etc. Institutions, the geographical and social context, the evolution of rules of the game, etc. influence the way companies act and interact in the global economy (Gereffi et al., 2001).

In general, two types of governance are distinguished in the GVC: Buyer-driven GVCs and producer-driven GVCs (Gereffi, 1994; 1999 b; Cheriet, 2017). In BDC, large distribution firms control marketing, design, brand and standards management, and product development without capital links with producers. Agri-food chains in developing countries appear to be controlled by buyers because in most cases they depend on multinationals close to the end consumer. Multinational companies control the production system and are responsible for setting prices (UNIDO, 2009). For PDC, producing firms manage and coordinate the activities of their suppliers and distributors. This management model corresponds to the Fordist model of vertical integration: upstream actors have the technical skills and capital necessary to produce goods and services. As a result, they establish barriers to entry through economies of scale (Tozanli and Gautier, 2007; Keane, 2012; Gereffi, 2014). The main difference between BDC and PDC lies in the fact that the former does not have processing plants but rather invest in the design, marketing and sale of the final product (UNIDO, 2009). In these governance models, the transaction cost theory finds its application. Investment in specific
assets increases mutual dependence between actors involved in the exchange. This investment engenders opportunistic behaviour or the implementation of protective measures by each party to the exchange (Williamson, 1979).

In the BDC and PDC dichotomy, several forms of coordination can be distinguished. The authors (Gereffi et al., 2005; Gibbon et al., 2008; Gereffi and Fernandez-Stark, 2016) distinguish five forms of governance in GVC: Market, modular, relational, captive and hierarchical governance (Figure 1).

In market governance, market relations are dominant when relationships between buyers and suppliers can easily be codifiable, assets specificity being relatively simple, and suppliers can produce without recourse to buyers’ assets. An asset is said to be specific when an actor (supplier/buyer) in the sector has voluntarily invested in it for a given transaction and cannot be redeployed for another transaction without a high cost (Barthélemy, 2000; Galiègue, 2012). The market governance model is characterized by some flexibility: Moving from one partner to another is relatively less costly. Authors (Gereffi et al., 2005; Gibbon et al., 2008; Gereffi and Fernandez-Stark, 2016) conceive the modular governance, the form of governance in which the buyer is somehow demanding and imposes specific standards to the characteristics of goods and services (products are complex). Here, suppliers have full responsibility for the use of skills and techniques. All expenses incurred are in their own account for customer satisfaction. The balance of power between customers and suppliers is relatively low, the supplier seeks total customer satisfaction, which will prevent the latter from controlling and evaluating the design and production process. Each actor has a free choice of partnership with another customer/supplier. Authors (Gereffi et al.; 2005, Gibbon et al., 2008; Gereffi and Fernandez-Stark, 2016) describe the relational chain as a governance characterized by a difficulty in coding specific assets. The products are complex and the suppliers have high level skills. It is characterized by frequent interactions between actors (buyer/supplier) and the importance of interpersonal communication. The physical proximity can also in certain situations build strong ties in this duality client/supplier. The captive governance refers to more asymmetric relationships. The supplier has low production capacities, and the key actor exerts power over the supplier with a relatively high intensity in terms of evaluation and coordination. The supplier is somewhat dependent on the buyer. Hierarchical governance occurs when products are complex and suppliers are incompetent in the production process. This results in a total dependence of suppliers on the buyer who develops the design and production processes in the producing firm (Gereffi et al., 2005; Gibbon et al., 2008; Gereffi and Fernandez-Stark, 2016).

3. METHODOLOGY

3.1. An Overview of the Tea Sector in Burundi

In Burundi, tea is produced in five areas - Rwegura, Teza, Ijenda, Tora and Buhoro - located in the Mugamba natural region. In each area there is a processing factory for green tea leaves from its plantations (industrial blocks except the Ijenda plant) and green tea leaves from the villagers - nearly 60,000 smallholder tea farmers. The latter have small areas of plantations - <25 ares and the rest of their arable land being occupied by food crops, vegetables and trees (Eucalyptus, Pinus). The five factories are under the sole management of the only actor - the Office du Thé au Burundi (OTB). The latter manages these five factories and is responsible for overall production, marketing and sales as well as other regulatory measures. The national production is

![Figure 1: Five global value chain governance types](source: Gereffi et al., 2005)
49,000 tons of green leaves (2016) over an area of ten thousand hectares (2016), 80% of the total area belonging to the farmers in the villages. When the tea plant was introduced in Burundi (in 1960s), its fertilizers (NPK mineral fertilizers) were subsidized and tea plants are distributed free of charge to smallholder tea farmers. Grant were awarded to farmers who had planted tea trees. Later (in 1992), mineral fertilizers (NPK) were sold on credit to small tea farmers by the governmental tea factories. The green leaf is sold to the nearby tea factories at a price set by OTB. The price is the same in all five tea factories. Despite considerable fluctuations in the price received for its tea, OTB changes tea leaf prices infrequently (Chart 1).

Since 2011 until today, the price per kg has been 250 BIF/kg ($0.14) while the price of dry tea first grade is sold at an average of $2.5 at auctions in Mombasa (Kenya). Dry tea is sold mainly abroad. In 2016, 10,000 tonnes of dry tea were sold.

3.2. Materials and Methods
The article aims to highlight the type of governance exercised in the tea sector in Burundi. Two specific objectives were pursued. On the one hand, we were interested in shedding light on the form of governance exercised upstream of the chain, i.e., the form of governance exercised by state authorities towards small tea farmers, and on the other hand the form of governance applied downstream of the chain at the national level. To achieve these two specific objectives, data were collected through triangulation - observation, qualitative and quantitative method. Thus, the survey was conducted among 120 smallholder tea farmers in the Ijenda and Teza tea-growing area and the different managers of the processing factories located in these areas. Due to time and resource constraints, these two areas were chosen because of their geographical location - they are located near the country’s capital. Other surveys were conducted with OTB’s technical directors. Stratified random sampling was used to give all small tea growers an equal chance to be selected for the entire tea acreage of the two surveyed areas (Marshall, 1996). Qualitative data were collected through semi-structured interviews and focus groups were organized with smallholder tea farmers. Secondary data were also collected to complete the analysis. The analysis and interpretation of qualitative data are carried out through content analysis (Patton, 2002; Duriau et al., 2007, Srivastava and Thomson, 2009).

4. RESULTS

4.1. The Captive Chain
The survey revealed that in addition to providing mineral fertilizers (NPK) on credit to smallholder tea farmers, public services strictly control activities related to the maintenance of the tea plantation, especially the weeding activities. When selling green tea leaves, small tea farmers who have not weeded their plantations are targeted and called to explain this behaviour. More rigorous control is done for green leaves of those who have not done the weeding.

In addition to this strict control, the tea farmers may be threatened not to sell their leaves because their plantations are not weeded. Sometimes, small tea farmers are threatened to no longer receive the mineral fertilizer (NPK) until their plantations are weeded. At every harvest, the extension officers are mobilized to enforce the standards of a good harvest; good leaves - Pekoe+1, Pekoe+2, Pekoe+3 young leaves and the tender banjhi must represent 75% of all the harvested leaves. Rough harvest (made without respecting harvest standards) is automatically refused.

The uprooting of tea plants to plant other crops (usually trees) is strictly forbidden. Uprooting a tea plant is done if the small farmer finds that the tea plant is of poor quality (usually large leaves), and he must replace the uprooted plants with other tea plants. Uprooting is done with the agreement of the extension officers who go on the field and note the necessity of the replacement. If this action is done by the tea farmer alone, he is obliged to replace the uprooted tea plant in addition to paying a fine ranging from 100,000 BIF to 200,000 BIF Depending on the size of the field occupied by the uprooted plants, the small tea farmer may be sentenced to imprisonment.

Unlike tea which price has been 250 BIF since 2011, prices of foodstuffs are volatile in the country. Since 2014, there has been a continuous rise in commodity prices in both rural and urban areas. The volatility of commodities makes smallholder tea farmers less interested in tea growing. The possibility of extending tea plantations varies from one area to another: only 25% of small tea farmers of Ijenda want the extension of the tea plantations against 36% of those of Teza. The main reasons for non-extending are essentially the scarcity of farm land and the old age of the tea farmers. The tea farmers want the extension of food crops (Table 1).

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1 With the average exchange rate of the Bank of the Republic of Burundi, 1 dollar equals 1,779 BIF as of June 29, 2018.

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Chart 1: Evolution of the price of the green leaf of the tea plant sold (BIF/kg)

Source: Based on OTB data, 2018
In Ijenda, 94% of the surveyed population is for potatoes whose growing cycle is short (it is 3 months) and they are more productive in the area. In Teza, 73% want a food crop extension in the ratio: 31% for bean, 18.1% for potatoes, 9.4% for corn, 4.6% for wheat and 9.2% for onions.

4.2. Market-based Governance

In Burundi, the tea plant is a cash crop for export. More than 90% of the dry tea is exported. The rest is for local sales in the country. Mostly sold in the Mombasa auction market in Kenya, the Burundian dry tea (more than 75%) shares the market with all other African countries producing tea. In this market, dry tea is sold from Kenya, Tanzania, Malawi, Rwanda, Uganda, etc. The price of tea in Mombasa is set by three factors: quality, supply and demand. Tea of good quality usually receives a higher price compared with other teas sold. Thus, many buyers put many producing countries in competition through brokers (each seller has his own brokers). Dry tea selling countries do not have a single customer and vice versa. Buyers are not involved in production and the country can sell dry tea at auction markets or directly to companies without brokers. In case of high tea production, prices on the auction market fall as well as the demand. This explains the simplicity of dry tea as an asset. According to the sales manager, the country must focus on the quality of dry tea because it cannot control supply and demand factors. Thus, tea first grade includes BP1 (Broken Pekoe 1), PF1 (Pekoe Fannings), PD (Pekoe Dust) and D1 (Dust 1) and represents 75% of the production. The tea 2nd grade is composed of F1 (Fanning 1), F (fanning), D (Dust) and BMF (Broken Mixed Fanning). It is sold mainly on the local market. Direct sales (15%) to private individuals abroad are negotiated between the country and foreign buyers, taking into account quality, quantity, delivery times and auction price.

5. DISCUSSION

The production and marketing of tea in Burundi is part of the GVC. It has multiple forms of governance depending on the level of the chain at which one finds oneself. The survey identifies two governance systems: captive chain governance form at the local level and market-based governance at the national level. As Burundi produces a small quantity of dry tea, it is imperative that it sells high quality tea. Dry tea is made by processing tea green leaves. For green leaves to produce better quality tea (better flavour, liquor, etc.), the tea plant must undergo special care (fertilizer, manuring, weeding, pruning, mulching, etc.) and the harvest of green leaves is done in respect of strict standards (Wijeratne, 2012). To enforce standards and requirements for better tea, state authorities use captive power. Public authorities apply it systematically. Initially, public authorities gave grants to villagers who adopted the tea plant in addition to the mineral fertilizer provided for free. The non-subsidization of fertilizer that followed shows a power asymmetry between state authorities and producers (Tozanli and Gauthier, 2007). This non-subsidization is followed by the mandatory use of mineral fertilizer as well as other forms of care associated with the production of quality green leaf (weeding, mulching and pruning). Control and coordination of the chain is strongly exerted by state processing factories with sometimes coercive measures (fines and imprisonment). Authorities know that an ill-maintained field yields poor quality production, a disadvantage for the country which relies on the quality of dry tea sold mainly outside the country and the intensity of competition in the global tea industry is very high (Thushara, 2015). The mobilization of extension workers during harvest to ensure compliance with harvesting standards and the refusal of a rough harvest are part of a logic of maintaining profits of downstream actors from processing the basic product and paying upstream producers. Small tea farmers, not having their own processing factories, must comply with specific standards and techniques to sell their production (Sumadio et al., 2017). Captive governance was reported in many sectors for different countries: the tomato sector in Morocco and Turkey (Tozanli and Gauthier, 2007), the groundnut sector in Madagascar (Youssi, 2008), the milk sector in Mali (Duteurtre, 2000), South Africa’s wine industry (Ponte, 2007), Kerala’s sea food industry from mid-1950s to late- 1960s in India (Somasekharan et al., 2015).

Small tea farmers with unproductive plantations develop some strategies to escape coercive constraints. Observation at the field showed tea plantations which are not maintained, a clear sign of plantations abandonment. This is a way to avoid the fine or imprisonment if the tea plants were uprooted. The non-maintenance of a plantation saves the farmer from the opportunity cost (loss in energy, time and cost) that would be allocated to an unproductive tea plantation, i.e., one that does not generate added value.

The spectacular increase in the price (in 2009 and 2010) is the consequences of an attempt to liberalize the Burundi tea sector. In 2010, a private company (Protem- Tea Project of Mwaro) for processing the green leaf into dry tea was established and began its activities of purchasing green leaves by offering tea farmers a very high price (250 BIF/kg). The small tea farmers neighbouring this private factory quickly changed their traditional habits by selling the green leaves of the tea to Protem. To avoid losing the suppliers of the green leaf tea, public authorities have directly revised prices up for all small tea farmers. Since 2011, the private company has no right to set foot in Ijenda area to buy green leaves.

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Table 1: Price evolution (BIF/kg) for food products deemed essential for extension (2017)

<table>
<thead>
<tr>
<th>Areas</th>
<th>Food</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teza</td>
<td>Beans</td>
<td>1500</td>
<td>1500</td>
<td>1500</td>
<td>1500</td>
<td>1300</td>
<td>1000</td>
<td>1000</td>
<td>1000</td>
<td>1200</td>
<td>1200</td>
<td></td>
</tr>
<tr>
<td>Potato</td>
<td>600</td>
<td>613</td>
<td>700</td>
<td>700</td>
<td>800</td>
<td>900</td>
<td>700</td>
<td>600</td>
<td>600</td>
<td>624</td>
<td>650</td>
<td></td>
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<tr>
<td>Corn</td>
<td>1400</td>
<td>1400</td>
<td>1300</td>
<td>1200</td>
<td>1200</td>
<td>1200</td>
<td>1200</td>
<td>1200</td>
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<tr>
<td>Wheat</td>
<td>1700</td>
<td>1700</td>
<td>1700</td>
<td>1800</td>
<td>1800</td>
<td>1800</td>
<td>1800</td>
<td>1800</td>
<td>1800</td>
<td>1800</td>
<td>1450</td>
<td></td>
</tr>
<tr>
<td>Onion</td>
<td>700</td>
<td>874</td>
<td>856</td>
<td>1196</td>
<td>1803</td>
<td>1604</td>
<td>1211</td>
<td>820</td>
<td>771</td>
<td>759</td>
<td>1186</td>
<td></td>
</tr>
<tr>
<td>Ijenda</td>
<td>Potato</td>
<td>831</td>
<td>800</td>
<td>720</td>
<td>949</td>
<td>819</td>
<td>949</td>
<td>837</td>
<td>837</td>
<td>909</td>
<td>844</td>
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</tr>
</tbody>
</table>

Source: ISTEEBU Monthly Price Bulletin, 2018
from small tea farmers. For both parties (state and private), the price is maintained at 250 BIF/kg.

The continuous price increase of foodstuffs in rural areas is explained by a growing demographic pressure of the rural population which is not correlated with the increase in production. Production is low and the population keeps growing. Rural areas of Burundi are in a situation comparable to that described by Malthus: “There is an intrinsic divergence between population growth and subsistence growth.” (Rutherford, 2007:2). The average land area of smallholders in Africa is 1.6 hectare (Salami et al., 2010). The demographic pressure has a negative impact on actors in the chain. Small tea farmers lose interest in the extension of tea plantation by comparing the price of tea leaves to their cost of production (Kaison and Brattlof, 2015; Wu, 2015). In Indonesia, area extension decreases by 1.7% each year (Sita, 2015). Despite the increase in food crop prices, tea cultivation has undeniable advantages for the country as source of foreign currency (Thushara, 2015) and for small tea farmers (regular income). The core of the problem lies in the smallness of the tea plantations. Small tea growers cannot benefit from the economy of scale like the big tea farmers in Asia, Sri Lanka, Kenya, etc. However, the tea plants allow small tea farmers to overcome the hunger season. In addition, the tea income, in addition to other incomes, permits the purchase of equipment and the payment of school fees, medical care, small livestock, access to small loans from microfinance, etc. The three factors - supply, demand and quality of dry tea - explain the governance market-based at the national level.

6. CONCLUSION

In this article the VC is analyzed from the GVC aspect. The foundation of the GVC lies in the nature, interrelations and the power (between buyers and sellers) that regulate the activities and coordination of the chain. Several forms of governance in the GVC are distinguished. In developing countries, the seller-buyer relationship is disadvantageous to upstream actors in the chain. Burundi is a small tea-producing country that shares the market with large tea producing countries and export prices for dry tea are set by downstream actors. The country must rely on quality by default of quantity. As a result, public processing factories of green leaf tea establish and enforce rules and standards to maintain high the quality of the product to be sold abroad. However, the producer price (small tea growers) has been kept constant for almost a decade. Because of lack of other strategies, small tea farmers take measures of non-extension of tea plantations, and younger generations are not interested in tea production. Couldn’t their grouping into cooperatives increase their bargaining power? Despite the fact that the tea is a perennial plant, will the non-extension of plantations lead to its extinction in the long run?

7. ACKNOWLEDGMENT

The authors thank the smallholder tea farmers for agreeing to answer all questions.

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