

Fair Trade Organisations in Belgium: Unity in Diversity?

Abstract

This article analyses the double movement that seems to be occurring in the field of Fair Trade Organisations (FTOs) in Belgium. On one side, there has been a gradual diversification of the organisational landscape over time, from pioneer volunteer-based nonprofits to a broader array including cooperatives, group structures, businesses and individual entrepreneurs exclusively devoted to FT. On the other side, a process of networking is currently taking place among the diverse types of FTOs, in the context of the creation of a Belgian Fair Trade Federation (BFTF). Drawing on neo-institutional theory, including the latest developments of “institutional entrepreneurship”, this article examines how and why these two processes have taken place. A qualitative field study in the Belgian FT sector, including interviews with 15 FTOs, offers a rich empirical material that shows the diverse patterns of these organisations. Based on the observed combinations of different variables among Belgian FTOs, I suggest a taxonomy reflecting diverse ways of conceiving and organising the FT activity. The different categories of FTOs, and the evolution of these categories over time, seem to reflect quite well the broader institutional evolutions of FT and its normative atmosphere. Other factors, however, must be considered to explain the diversification process, such as the role of subsidising and support public entities, and the differentiation processes initiated by FTOs themselves, particularly the newcomer FTOs. Finally, several factors may explain why the diversity among FTOs does not seem to be an obstacle to their networking.¹ While certain of these factors concern FTOs themselves (for instance their economic difficulties or the quest for legitimacy of newcomer FTOs), others are external to them and take the form of threats against which FTOs wish to defend themselves. In this context, I look at FTOs and their supporters as “institutional entrepreneurs” who come together to reshape and protect their way of seeing and practicing FT.

Keywords

Fair Trade, Fair Trade Organisations, Organisational diversity, Networking, Belgium

¹ The title of the article refers to this final question and echoes the motto of Belgium, « L’union fait la force », which could be translated as « united we are stronger ».

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Introduction

Belgium is one of the first countries where the Fair Trade (FT) movement has developed, together with other European countries such as the Netherlands, the United Kingdom, Italy or Switzerland (2005). The development of FT in Belgium has been less commented than in other countries: market shares are less impressive than for instance in Switzerland (e.g., Bezençon & Blili, forthcoming; Mahé in this issue; Krier, 2008), debates are less vivid than in France (see the two articles on France in this issue), and corporate involvement is less impressive than, for example, in the United Kingdom (see for instance Smith in this issue). Yet, FT has reached a very high level of awareness among the Belgian population (nearly 90%). FT products are present in the quasi-totality of supermarkets. In the meantime, the number of Fair Trade Organisations (FTOs) has increased dramatically over the last years. The organisational landscape of FTOs has gradually become more diversified, with nonprofit organisations, cooperatives, group structures, businesses and individual entrepreneurs all having a “100% FT” commitment. While such a diversity has brought some competition among FTOs, the current trend rather suggests an increasing collaboration.

The evolution of the context in which FTOs operate seems key in understanding both the diversification of their organisational landscape and the increasing networking among them. In this perspective, neo-institutional theory seems particularly adequate, both in its early propositions (DiMaggio & Powell, 1983; Jepperson, 1991; Meyer & Rowan, 1977; Scott & Meyer, 1991; Tolbert & Zucker, 1996) and in the more recent developments than can be grouped under the banner of “institutional entrepreneurship” or “institutional work” (Battilana & D’Aunno, 2009; DiMaggio, 1988; Lawrence & Suddaby, 2006; Leca *et al.*, 2008; Maguire *et al.*, 2004).

The first section describes the size, key features and main stakeholders of FT in Belgium, comparing some of the main figures with those in other European countries. The second section brings the building blocks necessary for the analysis: a definition of the notion of “FTO”, a summary of the propositions of neo-institutional theory, as well as a brief description of the methodology. The latter consists of a range of interviews with the leaders of FTOs and with major stakeholders linked to FT in Belgium. The third section then describes the historical evolution towards a diversification of Belgian FTOs, focusing on the organisational impacts of the shifting institutional context. Based on the analysis of several organisational variables, four categories of FTOs are distinguished. Finally, the fourth section examines the rationale and the implications of networking for these diverse types of FTOs.

1. Fair Trade in Belgium

Before focusing on FTOs, it is useful to look at the global landscape of FT in Belgium and the different types of stakeholders who intervene in the FT arena.

1.1. Sales and public awareness

In spite of the difficulties to estimate total FT sales (including non-labelled sales), it may be assumed that they exceeded 50 million euros in Belgium in 2007 (Idea Consult and Poos, 2008), among which 35 million euros of labelled sales. As table 1 shows, this is lower than in other European countries, even if we look at the consumption per capita (3.31 euros in 2007). Labelled sales have more than doubled from 2005 to 2007, mainly thanks to the increasing involvement of supermarkets. Mainstream retailers have taken a growing place in the latest years: 44% of the turnover in 2005, 48% in 2006, and an estimated 50% in 2008. This is consistent with studies on consumers' behavior, showing that 62% of the consumers having bought FT products had done it in the supermarkets in 2008, against 36% in 2005 (BTC-CTB & IPSOS, 2008). Contrarily to the fears of certain pioneers, the development of FT mainstreaming did not seem to reduce the sales in worldshops and other outlets, on the contrary. It only reduced their proportion with regard to total FT sales (Poos, 2008). It thus seems that FT mainstreaming benefited all the actors through a rise in the reputation and public awareness of fairly traded products.

In terms of food products, coffee and banana are the most popular, reaching volumes of, respectively, 1000 and over 4000 tons in 2006 (Idea Consult, 2006). In terms of market shares, honey is the best placed with 7%. The market share of bananas decreased slightly, from 6 to 5.63% in 2006. Coffee and rice have been stable, with respectively 1.76% and 1.74% market shares. These market shares, as well as the consumption per capita, are similar to other European countries such as France and Germany (Krier, 2005; 2008), but, as table 1 shows, they are lower than the European means, boosted by the high figures in Switzerland (more than 50% market share for bananas) and in the UK (20% for roasted coffee). Recently, FT food sales have been growing in spite of the general economic crisis. One plausible factor is the development of new types of distribution channels. B2B sales and public consumption of FT products are examples of fast growing channels. Sales to public entities increased dramatically thanks to promotion campaigns made by Oxfam and Max Havelaar. In 2006, they reached 681.000 euros (Idea Consult, 2008). Sales of handicraft, however, have been lagging behind since 2006 (SAW-B, 2008).

Table 1: FT figures in Belgium and in Europe

	Belgium (2007)	Europe (Krier, 2008)²
Labelled sales (2007, euros)	35 million	104 million
Growth (2005-2007)	133%	105%
Labelled sales per capita (2007, euros)	3.31	5.73
Number of licensees	75	69
Coffee market share	1.74%	3.47%
Banana market share	5.63%	8.46%
Non-labelled sales (2007, euros)	15 million	11.15 million ³
Number of worldshops	300	211

² Means calculated by the author on the basis of the figures for all the European countries for which the data were available in Krier's report.

³ Summing up the non-labelled turnover of the main FTOs in 13 European countries, Krier estimates the total retail value of non-labelled FT sales in Europe to 145 million euros in 2007, admitting that this is an absolute minimum.

In 2008, an estimated 86% of the Belgian population were familiar with the concept of FT (BTC-CTB & IPSOS, 2008), which is similar to neighbour countries (France, Switzerland, Netherlands, etc.)⁴ and relatively stable since 2006. Like in other countries (see for instance Mahé in this issue), such a high recognition is not translated into regular purchase: only 37% of the total sample bought FT products in the year before (BTC-CTB & IPSOS, 2008). It is worth noting that “Oxfam” is still the name most spontaneously associated to FT, before “Max Havelaar” and other names of FT organisations or brands (BTC-CTB & IPSOS, 2008).

1.2. Label

In 1989, just one year after its creation in the Netherlands, Max Havelaar was launched in Belgium. Several development NGOs were at the basis of Max Havelaar Belgium and some of them are still involved in its governance. This confirms observations of the role of NGOs in promoting labelling in several countries (e.g., Anderson, 2009; Reed, 2009). Max Havelaar Belgium, a founding member of FLO⁵, developed the first FT label in this country and certified the products of a small but growing number of companies (such as coffee roasters, chocolate companies, etc.). Starting with the Delhaize chain, and following with others (Colruyt, GB, Match, etc.), many supermarkets included FT products in their assortment. Next to supermarkets and FTOs dealing with labelled food products, there are approximately 150 Max Havelaar licencees, the most famous ones being coffee roasters (Café Liégeois, Rombouts, etc.), chocolate companies (Galler, Chocolats Jacques, etc.) and clothing stores (Cassis, Celio, La Redoute, etc.). Total sales by licensees rose by 133% from 2005 to 2007 (Krier, 2008), with the strongest increases observed for wine and cotton (Poos, 2008).

Recently, other labels or brands emerged in the context of “ethical trade” or “sustainable trade”, as will be explained further. Moreover, two others international labels claiming to be “Fair Trade” recently appeared: Ecocert and Fair for Life. However, Max Havelaar remains the main reference for FT food products. In 2007, it employed about 20 people and had an annual turnover of a bit more than 1.5 million euro, half of which from the cooperative entity—responsible for labelling—, the other half coming from the nonprofit entity—responsible for advocacy and education (figures from Max Havelaar’s 2007 Annual Report). As it appeared in Table 1, the labelled sales per capita reached 3.31 euros in 2007, which, although lower than in Switzerland (21.06) and the UK (11.57), is similar to Belgium’s neighbours France and the Netherlands (Krier, 2008).

1.3. Mainstream retailers

Nearly all supermarket chains in Belgium now include FT products. While “pioneer” supermarkets such as Delhaize, Colruyt and Carrefour increased their existing ranges of FT products, all retailers finally adopted FT for at least a small part of their products. “Hard discount” supermarkets such as Lidl also joined the move, thereby fading the link between FT products and wealthy customers (De Pelsmacker *et al.*, 2005). Contrarily to countries such as

⁴ The level of awareness of FT is even among the highest in Europe when we look at Krier’s report. It is difficult, however, to compare these awareness levels across the countries, since the questions and the methodologies used by the polling institutes may vary.

⁵ « Fairtrade Labelling Organisations International », the international umbrella of FT labelers.

Switzerland, Italy and the UK, in which cooperative supermarkets started selling FT products in the mid-1990s and clearly appeared as early supporters of FT (e.g. Smith in this issue; Bezençon & Blili, forthcoming; Nicholls & Opal, 2005), we cannot distinguish a similar category of supermarkets in Belgium. Although Delhaize has been the first to sell FT products and is now one of the most active retailers in terms of introduction of FT products, its involvement has remained mainly commercial and limited to a relatively small percentage of its products (twenty own-branded products, together with another twenty Oxfam Fair Trade products). As there is little information about the motivations and the vision of Belgian supermarkets, it is difficult to distinguish them in the same way as, for instance, Smith does in this issue. For a few years, supermarkets have developed own-branded products, often coexisting with FTOs' products. Own-branded products have sometimes been developed in collaboration with FTOs, for instance the "Solidair" products distributed by Carrefour and imported by Fair Trade Original.

1.4. Public involvement

In the late 1990s, FT became officially recognised and supported by public authorities, mainly through the creation of the "Fair Trade Centre". Such a centre was hosted at the "Belgian Technical Cooperation", the main public agency for development cooperation, and aimed to support FT both in the North (consumers) and in the South (producers). Such a promotion included the organisation of an annual "Fair Trade week" (in October), the publication of reports on FT awareness and sales in Belgium, and the creation of a dynamic and popular website.⁶ In 2009, the Belgian Technical Cooperation evolved to a broader support to sustainable trade, which led to the renaming to "Trade for Development Centre" and the decrease in explicit support for FT.

Under the impulse of Oxfam and Max Havelaar, several campaigns were organised to increase public purchasing of FT goods. This led several federal and regional public departments to switch to FT drinks. The involvement of towns also increased gradually, even though it is only recently that "FT town" titles have been formally awarded by Max Havelaar. FT public purchases by towns and cities have been pushed by a large campaign⁷ organised from 2006 by FTOs and NGOs for fairer and more sustainable purchasing practices.

The preference for FT products in public auctions, however, was heavily criticised by other sustainable trading initiatives, which multiplied in recent years and claimed to be "equivalent" to Max Havelaar. These initiatives were launched by corporations facing competition from FT, especially for popular products such as coffee and bananas (for instance "Efico" label created by coffee roasters, "Rainforest Alliance" for bananas, "Collibri" launched by the Colruyt supermarket chain, etc.). Fearing confusion among the public opinion, but also among decision-makers in the context of public purchases, FT actors felt the need for a public recognition to protect the FT concept. From 2004, supported by the former Fair Trade Centre, they advocated for a law on FT. Such a demand, although rejected by most mainstream companies and by the Liberal (right-wing) Party, was heard by the three left-wing and centre

⁶ www.befair.be

⁷ "Ca passe par ma commune" – www.capasseparmacommune.be

parties: the Socialist Party, the Humanist (Christian-Democrat) Party and the Ecologists. These three parties each wrote their own law proposal, aiming to encourage FT and to give a legal framework to the use of the term “Fair Trade”. Slowed down by the political situation in 2007 and 2008, the process of law examination at the Parliament could be resumed in 2009. However, the opposition of large corporations and right-wing political parties makes the adoption of a law explicitly favouring FT highly hypothetical.

2. Fair Trade Organisations: conceptual and theoretical background

In this section, I introduce the building blocks that will allow me to investigate Belgian FTOs: a definition of the term “FTO”, an introduction to neo-institutional theory and a description of the methodology.

2.1. Fair Trade Organisations

Originally, pioneer FTOs were referred to as “alternative trading organisations” (ATOs), “*a name stemming from the early days of Fair Trade where ‘fair’ seemed too weak a description of the vision that these companies had*” (Moore, 2004:76). This term, however, is less and less used, simply because the term “alternative trade” has been replaced by that of “fair trade”. Moreover, the organisations that recognised themselves as such (typically, in Europe, the historical importers members of the “European Fair Trade Association” - EFTA) have become less “alternative”, and both the frontiers between ATOs and businesses and the historical distribution of roles between import (ATOs) and distribution (worldshops) have become increasingly blurred. However, several authors (e.g., Nicholls and Opal, 2005; Reynolds *et al.*, 2007; Wilkinson, 2007), consider that the notion of ATO is still useful to distinguish 100% FT companies from corporations involved only to some extent in FT. Such a “100% commitment” to FT is also central for Reed and his colleagues, in this issue, when they define “FT businesses” in Canada.

Reed, Nicholls⁸ and their co-authors propose a second discriminating element: unlike corporations dealing with FT products, FTOs are engaged in education and advocacy. This might echo the classical definition of FT by FINE⁹, which ends by stating: “*Fair Trade organisations (backed by consumers) are engaged actively in supporting producers, awareness raising and in campaigning for changes in the rules and practice of conventional international trade*”. But this definition of FTOs insists *only* on education and advocacy, thereby referring to the whole range of structures supporting FT (networks, NGOs, labelers, etc.) rather than to the organisations and businesses engaged in a trading activity. Contrarily to this perspective, I follow the World Fair Trade Organisation (WFTO) that defines FTOs as “*organisations directly engaged in Fair Trade through their trading activity*”.¹⁰ In other

⁸ If we assume that Nicholls and Opal’s (2005) description of “ATOs” can be extended to that of “FTOs”.

⁹ FINE is an informal network set up in 1998 and gathering the four main Fair Trade umbrella organisations of the time: FLO, IFAT, NEWS! and EFTA.

¹⁰ http://www.wfto.com/index.php?option=com_content&task=view&id=153&Itemid=186&lang=en, viewed on September 13, 2009. This excludes the organisations and networks that are only engaged in promoting and advocating for FT from the scope of this study. We will consider these structures as major stakeholders of FTOs, but not as FTOs themselves.

words, it is thus the “100% FT” commitment within the trading activity rather than the formal involvement in education and advocacy that characterises FTOs. It is worth noting that “being engaged actively in education and advocacy” may take different forms, as will be described further in the Belgian case. While Reed *et al.* (in this issue) describe these organisations as FT *businesses*, and Davies and Crane (2003) speak of FT *companies*, I follow WFTO, Krier (2005; 2008) and Moore and his colleagues (forthcoming) who refer to FT *organisations*, which seems the most encompassing, generic and neutral term.¹¹ While Krier (2008) distinguishes four types of FTOs (producer organisations, importers, worldshops and labellers), I will examine only the three latter types of trading activities, keeping in mind that import and retailing often coexist within FTOs (Krier, 2008).

2.2. Neo-institutional theory

In order to examine to what extent the evolution of FTOs in Belgium reflects the broader shifts in the environment, neo-institutional theory appears particularly useful. The origins of neo-institutional theory are generally located around 1980, with articles by Meyer and Rowan (1977), and Powell and DiMaggio (1983). For a review of the founding articles and subsequent evolutions, see for instance Powell and DiMaggio (1991), Tolbert and Zucker (1996), or Scott (2005). In the continuity of—but with nuances compared with—the “old” institutional strand (embodied by the work of Selznick), neo-institutionalists reject traditional rationalist models of organisational behavior and view the latter as heavily constrained by the organisation’s culture and environment. Meyer and Rowan (1977) are among the first to contest the dominant functional view of organisations by showing that “*structures can become invested with socially shared meanings, and thus, in addition to their 'objective' functions, [...] serve to communicate information about the organisation to both internal and external audiences*” (Tolbert & Zucker, 1996:171). Specific to new institutionalism is to “*locate irrationality in the formal structure itself, attributing the diffusion of certain departments and operating procedures to interorganisational influences, conformity, and the persuasiveness of cultural accounts, rather than to the functions they are intended to perform*” (Powell & DiMaggio, 1991:13). Such institutional influences, according to neo-institutional authors, are often isomorphic, which means that they lead organisations to adopt forms that reflect their environment, thereby gradually resembling each other.

Powell and DiMaggio (1983; 1991) deepen the notion of organisational isomorphism, distinguishing three types of institutional pressures causing isomorphism: coercive, mimetic and normative. Coercive isomorphism “*results from both formal and informal pressures exerted on organisations upon which they are dependent and by cultural expectations in the society within which organisations function*” (1991:67). These pressures may originate from the government, the legal environment or important stakeholders (e.g., funders), who impose or induce particular rules and structures (Scott, 1991). Mimetic processes refer to imitation among organisations. “*When goals are ambiguous, or when the environment creates symbolic uncertainty, organisations may model themselves on other organisations*” that they perceive to be more legitimate and successful (1991:69). Finally, normative pressures stem from

¹¹ Indeed, while all FTOs do not necessarily recognize themselves as “businesses”, they are certainly all organisations.

professionalization: it is through formal education, the hiring of people within the same industry, and the development of professional networks across which norms and models spread rapidly (promotion of “professional” practices), that organisations tend to resemble each other.

Neo-institutional theory is particularly interesting because it challenges—at least in its early propositions—the observation of organisational diversification that underlies this article. Such a diversification can be better understood in the light of more recent work that highlights the existence of “institutional voids”, or the coexistence of different institutional orders in certain fields (Kraatz & Block, 2008). But these institutional orders are not necessarily independent from the actors in the field: they may be seen as constructed, or “brought in”, by the actors themselves in the context of an “institutional bricolage” (Lawrence & Suddaby, 2006). The ability of the actors to shape their institutional context has been emphasized for several years within the strand of “institutional entrepreneurship” (DiMaggio, 1988) or “institutional work” (Lawrence & Suddaby, 2006). Entrepreneurship is not understood so much in the sense of the creation of particular organisations, but rather as the “*generation of new organisational models and policies that change the direction and flow of organisational activity*” (Hwang & Powell, 2005:180). However, bringing agency in a theory built upon institutional determinism leads to a paradox, which is referred to as the “embedded agency” paradox (e.g., Battilana & D’Aunno, 2009), as summarised in the following question: “*how can organisations or individuals innovate if their beliefs and actions are determined by the institutional environment they wish to change ?*” (Leca *et al.*, 2008:4). In this article, we will explore FTOs as both influenced by a set of institutional patterns, and capable of shaping and altering these patterns through institutional work.

2.3. Methodology

To examine the double process of diversification and networking from the Belgian FTOs’ standpoint, I conducted a field study in 2007 and 2008 in the context of a broader research on FTOs.¹² Besides a set of FT stakeholders (NGOs, public agencies, etc.), I contacted twenty-one FTOs (by e-mail). These FTOs were identified with the help of the TDC. After two e-mail reminders and one phone call, fifteen leaders accepted a face-to-face interview (71% response rate). The following table summarises the legal form, economic function, product range and age of these fifteen FTOs. As we can see, these FTOs are quite diversified. Moreover, they represent the broader Belgian landscape quite well: all the pioneer FTOs are included, as well as a large part of the newer FTOs.

Table 2: Sample of Belgian FTOs

	Legal form	Economic function	Product	Creation
Citizen Dream	Business	Import & retail	Handicraft	1999
D’ici, d’ailleurs	Nonprofit	Import & retail	Handicraft	2005
Emile	Co-operative	Retail	Handicraft	2004
Ethic Store	Business	Wholesale & retail	Mixed	2007
Fair Trade	Nonprofit	Import, wholesale & retail	Mixed	1978

¹² PhD research on the organisational diversity in European FTOs.

Original				
Latino	Business	Import & wholesale	Handicraft	1998
Max Havelaar	Nonprofit & co-operative	Labelling	Food	1988
Miel Maya	Nonprofit & co-operative	Import, wholesale & retail	Honey	1971
Oxfam-MDM	Nonprofit	Import, wholesale & retail	Handicraft	1976
Oxfam-WW	Nonprofit & co-operative	Import, wholesale & retail	Food	1975
Satya	Individual	Import & wholesale	Clothing	2004
Sjamma	Nonprofit	Import & retail	Clothing	1996
Tout l'or du monde	Co-operative	Retail	Mixed	2007
Vino Mundo	Individual	Retail	Wine	2004
Weltladen	Nonprofit	Import & retail	Handicraft	1978

Semi-structured interviews were led with the general manager, entrepreneur or coordinator of each FTO (the names vary with the types of organisations). In certain cases of “group structures” (two legal entities), the leader of each entity was interviewed. These interviews lasted between 1h30 and 2h. Obviously, the choice of meeting only one person entails limitations in the interpretation of the results. Yet, given the strong time limitations of FTOs and the growing demands for information from the academic world, I focused on the leader as the most suited person to have an overall vision of the organisation’s structure and strategy.

The interview guide was organised in three parts. First, I asked about the history of the FTO and its evolution over time. I also asked to locate such a history regarding the general evolution of the sector. Secondly, I asked to describe the organisational form (legal form, architecture, governance, etc.) and to explain the perceived reasons behind the organisational choices and evolutions. Thirdly, I asked information about the sales (amount and composition) and the distribution strategies.

Finally, as already mentioned, I interviewed a range of FT stakeholders, mainly representatives from the TDC, from support structures and NGOs, and from the BFTF. From 2007 to 2009, I particularly followed the different steps of the creation of the latter network, with participation to the meetings and informal discussions with the members. The interviews with major FT stakeholders and with the leaders of fifteen Belgian FTOs, combined with the knowledge accumulated thanks to previous studies on FT in Belgium (e.g., Huybrechts, 2007), provided rich information about the evolution of the sector, particularly from the FTOs’ standpoint.

3. The diversification of FTOs in Belgium

3.1. Institutional phases

In order to understand the diversification of the organisational landscape in a neo-institutional perspective, it is important to examine the historical evolution and structuration of the field. Powell and DiMaggio (1983:65) define the process of “structuration”, or “institutionalization”, as consisting of four parts: *“an increase in the extent of interaction among organisations in the field; the emergence of sharply defined interorganisational structures of domination and patterns of coalition; an increase in the information load with which organisations in a field must contend; and the development of a mutual awareness*

among participants in a set of organisations that they are involved in a common enterprise". The recent networking initiative corresponds well to the latter stage. But, of course, there have been interactions among FTOs from the beginning, especially among FTOs of a similar generation. The evolution of the institutional environment of FTOs can be structured in three phases: the initial foundation, the development of certification and mainstreaming, and the entrepreneurial phase.¹³ Let us examine how the FTOs' forms and strategies reflect the institutional–normative, coercive and mimetic–forces at stake during these different phases.

Foundation (1960s-1980s)

The first Oxfam worldshop ("wereldwinkel") was opened in 1971 in Antwerp and several other cities followed. In 1975, the Flemish worldshops formalised as "Oxfam-Wereldwinkels" (hereafter Oxfam-WW). The French-speaking worldshops launched "Magasins-du Monde Oxfam" (hereafter Oxfam-MDM) one year later. The number of worldshops and of volunteers increased rapidly and the name "Oxfam" became particularly famous and synonym for "Fair Trade" in the public opinion–situation which remains at this date. Nevertheless, other pioneer FTOs emerged in the 1970s and also played an important role in the diffusion of the movement: Miel Maya, Fair Trade Original, Weltladen, etc.

The early decades of FT in Belgium correspond to what is commonly described in the literature. At that time, FT was conceived as the illustration of a broader socio-political project. FTOs were strongly rooted in civil society and had a central political vision, seeing FT as an alternative to the dominant capitalist model (e.g., Gendron, 2004; LeClair, 2002; Reynolds & Long, 2007; Renard, 2003). Their intent was not only to set up own "fair" trading practices, but also to increase awareness in the general public, governments, and corporations, about the need to make trade fairer (e.g., Wilkinson, 2007). This included the promotion of solidarity and economic democracy, which can be considered as the major "myths" (Meyer & Rowan, 1977) at that time period. Partnerships aimed marginalised producer organisations and were often politically tinted, with deliberate support, for instance, to producers in socialist countries. Solidarity and economic democracy appeared more important than the quality of the products, which, together with the distribution strategy based on worldshops, led to a low market penetration (e.g., Low & Davenport, 2005).

What were the organisational implications of these values? First, the nonprofit form was clearly favored: all the Belgian FTOs created at that time period started as nonprofits. Such a form without formal owners and without any profit distribution seemed well suited to reflect values of economic democracy and solidarity. Many of the interviews illustrate the "taken-for-granted" nature of the nonprofit form at the creation of FTOs by groups of citizens. As reported by the leader of one of these pioneer FTOs: *"at that time, all FTOs were created with a nonprofit status. It was unimaginable to even think of adopting another legal form. Any 'business' FTO would have been forced out of the movement"*. This can be interpreted as a normative but also as a mimetic pressure. Indeed, at a time with few FTOs, the new ones tended to model themselves upon the older ones, with the nonprofit, volunteer-based form

¹³ It is worth noting that several Belgian practitioners make a similar distinction, for instance Oxfam-MDM (in several of its analyses available on www.omdm.be) and the Trade for Development Centre (Poos, 2008).

being particularly legitimate. A second characteristic was the presence of volunteers performing various tasks: worldshops, campaigning, education, as well as governance (Board and general assembly). A third characteristic was the relatively informal architecture, with few procedures and much “ad-hoc” interactions. For instance, a group of employees and volunteers came together for a specific campaign or to visit a particular producer group. Finally, distribution strategies reflected the informal and alternative positioning, which translated into creating networks of worldshops, church groups and sensitised citizens (Littrell & Dickson, 1997; Low & Davenport, 2005; Raynolds & Long, 2007).

Labelling and mainstreaming (late 1980s - early 2000s)

Until the late 1980s, the pioneer FTOs continued developing their networks of worldshops and diffused the FT concept, albeit to a small part of the population. Like in other countries, the development of FT certification strongly contributed to the development of FT sales and awareness through the involvement of a growing number of corporations. Facing the prospects of an increasing competition from mainstream players, several pioneer FTOs decided to collaborate with these players, particularly with supermarkets. From the late 1990s, Fair Trade Original offered its products in certain supermarkets. A bit later, in spite of heavy debates among the volunteers, Oxfam-WW, with the agreement of its French-speaking counterpart, decided to sell its own products in the supermarkets. According to the interviewees at Oxfam, the rationale was not only the possibility to increase the benefits for the producers, but also the opportunity to influence mainstream corporations. A consequence of the partnerships with supermarkets was that Oxfam-WW decided to make its co-operative entity (already created in 1994) totally autonomous and to call it “Oxfam Fair Trade”, which also became the brand of the products.

Miel Maya and Max Havelaar also evolved towards group structures composed of two distinct entities. While this can be explained by the collaboration with supermarkets, and more globally by the normative atmosphere favouring professionalism and market orientation, the most concrete driver behind group structures is of a coercive nature. In the end of the 1990s, nearly all pioneer FTOs had an important activity of extra-economic producer support, through development projects with the producers’ communities or even beyond these communities. This activity was subsidised to a great extent by the Belgian Directorate-General for Development Cooperation (DGDC). However, with the commercial development of these FTOs, the subsidising office became reluctant to give subsidies to a “company”. It required to fund only the “NGO” part of the activity. As a result, most pioneer FTOs had to split up their structure into two entities: a company and an NGO. Miel Maya and Max Havelaar followed the example of Oxfam-WW (that had already created a separate structure for its economic activity). Only Oxfam-MDM managed to remain as a single entity, even if it had to clearly distinguish the two activities in its accounting.¹⁴ The creation of a specific commercial structure gave a boost to the economic development of Oxfam-WW, of Miel Maya and of Max Havelaar. The latter brought a growing number of mainstream companies, including supermarkets, to invest the FT niche, attracted by its promising potential.

¹⁴ Concerning the other pioneer nonprofit FTOs: Fair Trade Original and Sjamma were not subsidized; Weltladen was, but mainly at the local level.

The professionalism of these pioneer FTOs, as well as their highly positive reputation in the eyes of the consumers, put them in a rather powerful position to collaborate with the supermarkets. Indeed, even for certain products exclusively sold in specific supermarkets, several pioneer FTOs managed to organise the supply chain and to brand the products.¹⁵ Historically, the FT supply chains have thus generally been “social economy dominated”, which means that the FTOs were in a dominant position (Crowell & Reed, 2009). On its turn, the collaboration with mainstream players reinforced the commercial profile of the FTOs. In particular, the commercial departments of these FTOs gained an increasing importance, and even a large autonomy in the context of group structures. From a neo-institutional perspective, as put forth by Meyer and Rowan (1977) and Townley (2002), the fact that the commercial departments have gained power and autonomy can be seen as a consequence of the fact that they embody the most recent and powerful rationality—those striving toward professionalization and market-orientation. Other implications were the involvement of people with business expertise in the management and in the governance structures, and a stronger use of marketing tools in the design and distribution of the products. This often led to tensions with the stakeholders (such as part of the volunteers) who got involved in the pioneer FTOs attracted by the norms and values of the foundation phase.

To summarize, the evolution of these FTOs towards a distinction and a specialization of their activities can thus be interpreted as the result of two institutional pressures. The first is a normative atmosphere, encouraged by Max Havelaar, corporations and several FT stakeholders (including NGOs), which focuses on the development of the economic activity in order to increase the benefits to the producers. Several authors comment on the shifts in practices and values that derive from mainstreaming, typically in terms of producer support, which is described as evolving from “solidarity” to “market” (Poncelet *et al.*, 2005), from “relationship” to “information” (Ballet & Carimentrand, 2008), from “partnership” to “control” (Charlier *et al.*, 2007), etc. The core concept is that of “market access” for producers, which is the most straightforward avenue to improve their livelihoods and their autonomy. The relatively informal partnership rules applied by pioneer FTOs were replaced by more formal criteria developed by FLO (e.g., González & Doppler, 2006). As a result, economic democracy was much less central, as the inclusion of plantations illustrates quite strikingly (Reed & McMurtry, 2009). This first institutional pressure was reinforced by a second, more coercive one, originating from public authorities. These two pressures thus led to the emergence of “group structures” and also sent a signal to FTOs that they should choose between being an NGO supporting FT or becoming a business focused on the trading activity. Other pioneer FTOs, however, remained with the two types of activities integrated in the same organisational structure (e.g., Oxfam-MDM and Weltladen). The interviews with the leaders of these FTOs suggest that they remained somehow anchored in the vision corresponding to the previous, foundation phase, looking with some suspicion at the development of mainstreaming and the evolution of the other pioneers working with supermarkets.

FT entrepreneurship (2000s)

¹⁵ Typical examples are Oxfam wine developed for the Delhaize supermarkets, and the “Solid’air” range developed by Fair Trade Original for Carrefour.

In 1998, an FTO of a new type was created, called Citizen Dream. Citizen Dream differentiated itself sharply from the pioneer FTOs by taking the form of a commercial “for-profit” company¹⁶ and by fading the FT origin of the products in order to reach less sensitised consumers. For this purpose, Citizen Dream established a dozen of shops in city centres. The design of the shops and the quality of the products were intended to attract the “mainstream consumers” who were not familiar with the worldshops. Several individual shareholders contributed to the venture. Even though many of these shareholders were early supporters of FT, it seems clear that this type of involvement in a FT venture was totally new. Thereby, Citizen Dream inaugurated a new way of “doing FT” (Biélande, 2006).

Following the development of Citizen Dream, although at a smaller and more focused level, several FT companies were created after 2000 at a rhythm of at least three or four new FTOs each year. The emergence and development of small FT companies was favoured by several factors: growth of the FT market, interest of “idealistic entrepreneurs”, existence of niches uncovered by the pioneer FTOs in terms of products (e.g. wine, chocolate, etc.) and distribution channels (Internet sales, B2B, etc.), etc. Several examples can be given: Ethic Store (Internet sales and B2B), Satya (clothing), Vino Mundo (wine), Emile (home sales following the “Tupperware” model), Ozfair, Tout l’or du monde (shops), etc. These business-form FTOs constitute what some start calling a “Third FT wave”—the first wave being the launch of FT by pioneers and the second one being FT labelling and mainstreaming (Poos, 2008; see also Ozcaglar-Toulouse et al. in this issue).

The interviews suggest that the normative institutional references embodied by these companies were quite different from those linked to the previous two phases. These normative references seem to correspond to the descriptions of “social entrepreneurship” (Dees, 2001; Mair & Marti, 2006; Nicholls & Cho, 2006), more particularly to the “social innovation” strand emphasised by Nicholls in this issue. The individual entrepreneur emerged as the central figure, not only in the North, but also in some cases at the producers’ level, whereas the older FTOs were generally created by groups of citizens in a much more collective dynamics. These new FT entrepreneurs often had a business education and/or experience, thereby having a quite different background and language compared to the more activist leaders of the pioneer FTOs. The emergence of these entrepreneurs in FT can thus be linked, at least to a certain extent, to the increasing number of programs and trainings relating to social entrepreneurship, as well as to imitation patterns, as several entrepreneurs of newcomer FTOs admitted. Five out of the seven interviewees of this generation started their venture after travels to the South during which they met producers and developed their specific “vision” of partnership. In certain cases, smallness was presented as a deliberate choice allowing the entrepreneurs to keep the control over their initiative and avoid the perils of formalization and bureaucracy. These perils were often at the core of the criticism toward large, institutionalised FTOs, in a vision in which scaling up was seen as compromising the personal relationships—including with the producers and the customers—and the social innovation. New FTOs’ entrepreneurs also emphasized their distinctiveness regarding pioneers through

¹⁶ “Société anonyme” in Belgian law. While “for-profit” is the term often used in the economic literature (Gui, 1987), it does not seem to correspond to companies that have a business *form* but whose theoretical profit-making *goal* is, at the very least, constrained by their exclusive and total commitment to FT.

professionalism and exclusively market resources. Indeed, the use of volunteer work, subsidies, and donations, were generally rejected and presented as disloyal competition. Organisational diversity is thus not only a matter of different institutional situations across time, but also explicit differentiation processes. Finally, beyond the economic innovations characterising newcomer FTOs (focus on new products and distribution channels), there was also social innovation in the content of the FT practice, for instance through links with work-integration social enterprises in Belgium, through experimentation of “local Fair Trade”¹⁷ or through a stronger focus on reducing the environmental impact.

Besides a normative atmosphere favourable to entrepreneurial solutions to social issues (Dart, 2004; Grenier, 2006), it is worth noting that new FT businesses were encouraged by public authorities through the TDC. Among its missions, the TDC wished to stimulate new FT initiatives thanks to the “Be Fair Award” rewarding two new FT companies each year. Such an award increased the notoriety and the credibility of the nominees. In such sense, the “Be Fair Award” can be considered as a stimulator for entrepreneurship in FT. Moreover, it constituted a signal towards potential entrepreneurs and towards the broader business world that FT could be a promising market for ethically minded businesses.

A parallel signal emerging from the first entrepreneurial experiences, however, was that FT was a risky business with no guarantee of success despite the broad consumer interest. Difficulties were particularly severe in FT handicraft, as illustrated by the bankruptcies of Emile and Citizen Dream in 2008 (even Oxfam-MDM suffered high losses). Belgian handicraft FTOs gathered to work on the improvement of their economic model in the context of a study under the impulse of the Walloon minister of economy and a Belgian French-speaking platform of social economy organisations called SAW-B (“Solidarité des alternatives wallonnes et bruxelloises”). This study recommended, among other things, a stronger collaboration among FTOs, especially from an economic standpoint.

Synthesis

The following table synthesises the main features of the three abovementioned phases. A special attention is devoted to the organisational implications of the institutional patterns in the these different phases.

Table 3: Principles and organisational implications of the three phases

	Foundation	Labelling and mainstreaming	Entrepreneurship
Period	1960s-1980s	1990s-200s	2000s
Vision	FT as an alternative rooted in civil society	FT as an “ethical influencer”	FT as an entrepreneurial activity

¹⁷ For instance, organic wine from Rhône-Alpes winegrowers, food produced on Sicilian fields taken back from the Mafia, etc.. These products have been considered coherent with the “traditional” Southern FT products and have generally been successful among FT consumers.

Producers groups	Marginalised Focus on economic democracy Global relationship Control by volunteers	Large Economic democracy less central Standardised relationship Control by certification	Small Economic democracy not central Personal relationship Control by managers
Products	Guided by producers' habits and identity; quality not central	Guided by consumers' preferences; focus on quality	Matching of producers and consumers' needs; focus on innovation
Distribution strategy	Worldshops, catalogues, churches, etc.	Supermarkets	Small and medium-sized shops; Internet and B2B
Organisational forms	Nonprofit Democratically and collectively governed	Cooperative, business or hybrid (group) Governance including expertise	Individual and business Manager-dominated (+ shareholders)

3.1. Current landscape and taxonomy

Several interviewees, especially among the newcomer FTOs, considered that the public opinion, the media and even people involved in FT seemed to have a quite monolithic image of FTOs. FTOs tend to be associated to the image of the early voluntary, nonprofit organisation relying on subsidies and donations and focused on campaigning more than on business. The expression “Fair Trade NGO” is emblematic of this vision (e.g., Biélande, 2005; Pleyers, 2005) and of its extrapolation to the whole FT sector. But, paradoxically, several of the leaders of newcomer FTOs also contributed to the monolithic image when, often ignoring the evolution of FT pioneers (such as Oxfam-WW), they depicted the latter as largely subsidized, relying on volunteers and lacking a business vision.

The institutional background of each generation of FTOs is certainly a key element to understand their differences. Using Reynold's (2007) distinction, a superficial look at the sector would lead to describe pioneer FTOs as rather “movement-oriented” and the newcomers as rather “market-oriented”. However, even in the same generation, there are diverging patterns embodying different articulations of movement and market orientations. As already mentioned, certain pioneer FTOs, especially those active in the food sector, have evolved to a much stronger commercial orientation, while others have maintained a clear “alternative”, political identity. Group structures seem to simultaneously pursue both orientations. Newcomer FTOs, in spite of their common business profile, do not necessarily have the same vision of FT. I thus follow Gendron *et al.* when they state that “*Fair Trade is translated into chains, structures and organisations that are far more numerous and varied than what a simplistic analysis [...] restricted to the sole labels [and networks] grouped within FINE might suggest*” (2009b, author's translation). The two networks that are often contrasted to each other are FLO, mainly dealing with food products and rather market-oriented, and WFTO, whose members—producers, importers and retailers—are more engaged in a movement perspective. While this “two-wing picture” of FT is certainly still useful and reveals a fundamental tension in FT (e.g., Wilkinson, 2007), it has become insufficient to capture the whole diversity and complexity of the current FT landscape, especially when we

look at the local level (Ozcaglar-Toulouse *et al.*, forthcoming). Rather than restricting FT to its most institutionalised components, my intent is to “*recognize the plurality of practices likely to underlie the Fair Trade project in the context of a dialogue between pioneer and newcomer organisations*” (Gendron *et al.*, 2009b:191, author's translation).

This is why I suggest to categorize Belgian FTOs from a “bottom-up” perspective, on the basis of range of variables linked to their age, size and organisational form (legal form and governance model) and to their strategies and vision of FT (resources, distribution strategy, type of producer support and involvement in education and advocacy). Based on the most common combinations of these elements, four dominant patterns emerge, corresponding to four different types of FTOs that seem internally coherent and different from each other. This categorization can obviously be discussed and criticized: it is based on a non-exhaustive set of variables and on the Belgian field. Yet, it may help to characterize different types of FTOs that seem observed in other countries. Based on my broader research, I would suggest that the translation of this taxonomy to other countries would, generally speaking, involve adding categories rather than deleting those that can be identified in Belgium.

- **Pioneer, nonprofit, volunteer-based FTOs with mixed resources and a focus on education and advocacy (type 1)**

Examples include Oxfam-MDM, Sjamma and Weltladen. These pioneer FTOs have kept their original structural features consisting of a nonprofit form and a volunteer-based governance model. In these three FTOs, the nonprofit form¹⁸ was relatively taken for granted. Moreover, it was considered as a crucial signal towards external stakeholders (partner NGOs, public authorities, etc.), but even more towards internal stakeholders (volunteers, employees, donors, etc.), that business was not their main focus. More than the nonprofit form FTOs, it is the volunteer-based governance that characterises this category of FTOs. Members of the General Assembly and thus also of the Board of Directors are nearly exclusively volunteers. The leaders of these FTOs particularly insisted on the democratic role of the governance structures. Such a democracy was often pointed as a key value and as an element of coherence with what is required for the producers in the South. Moreover, most leaders reported that the presence, in the governance structures, of volunteers participating in worldshops or campaigning brought certain legitimacy to the FTO, particularly in the socio-political aspects. In terms of producer support, these pioneers differed from the other types of FTOs in their long term and institutionalised partnerships (many of the original producer groups are still partners), as well as in their political dimension.

In the case of Oxfam-MDM, the “political unit” clearly aimed to reaffirm this dimension, putting forward the political involvement of certain producer groups, as emphasised in the description of the foundation phase. The coordinator of this unit stated: “*It is necessary to build partnerships with producers that include a commercial dimension. But we will only be able to support a small number of producer groups. If we want to offer a better deal to all producers in the South, we need to simultaneously act at a wider level by putting pressure on the governments and on the large market players.*” Striking is that the expectations of

¹⁸ « Association sans but lucratif »

producer organisations may be interpreted differently than what the logics of mainstreaming suggest, as stated by the same person: “*Many of the producers with whom we are in contact are advocating in their country. In Latin America, our partners are very engaged in the ‘alter-globalization’ movement and see FT as an opportunity not only to raise their incomes but even more to establish links with other solidarity-based companies in the world*”.¹⁹

Education and advocacy were most explicit in these FTOs. For instance, Oxfam-MDM regularly targeted multinationals (e.g. Ikea) and mobilised its volunteers and supporters with a very clear agenda. Education campaigns were also organised before elections, with interpellations of political candidates on topics going well beyond the FT issue. But education and advocacy were also present in the day-to-day trading activities, most strikingly in the worldshops, where selling to customers and educating citizens are closely connected to each other.

In brief, type 1 FTOs are operating with structural features that correspond to the initial institutional setting of FT, which has evolved from being the rule for FTOs to being the exception. The keeping of these features regardless of the broader institutional evolution can be captured through the process of *imprinting*, which can be defined as “*the process by which new organisational forms acquire characteristics at the time of their founding which they tend to retain in the future*” (Scott, 1991:178). One of the reasons for the particular situation of these FTOs is their focus on handicraft products rather than on food, which did not expose them to contacts—either collaboration or competition—from corporations. The second reason is that their volunteer-based network of worldshops and their focus on education and advocacy has continued attracting activist customers and “alternative” (non-commercial) resources, including donations, public subsidies but also voluntary work. However, as already mentioned, the arrival of new FT businesses selling handicraft and the general crisis of this category of products has put pressure on this model. The recent financial difficulties of Oxfam-MDM, and the ambiguous position of the economic activity in the context of what is called a “political movement”, illustrates the crisis in which this “way of doing FT” seems to be stuck. Although Oxfam-MDM remains a tone-giver in the Belgian FT sector, the relatively weak economic development of this type of FTOs compared to group structures, and the multiplication of newcomer FTOs, make this an increasingly minority category in the Belgian landscape.

- Pioneer nonprofit FTOs that have evolved to multi-stakeholder, mixed resources and mixed goals group structures (type 2)

I already highlighted how the collaboration with supermarkets, combined with the pressure from the DGDC, led pioneers dealing with food products to professionalise and specialise their activities, clearly distinguishing the economic and the socio-political ones. Even if the splitting of the previously single nonprofit structure into two separate entities resulted from an external coercive pressure, the three FTOs were free to choose how they would organise the commercial activity. In the three cases, the cooperative form was preferred because it allowed

¹⁹ A manager of a nonprofit FTO; original quotation in French, author’s translation. “Solidarity-based companies” is originally “enterprises solidaires”.

to combine, on one hand, the democratic functioning, limited profit distribution²⁰ and ideological proximity with FT²¹ and, on the other side, easier access to capital and higher economic incentives compared to the nonprofit form (Hansmann, 1999; Spear, 2000).

In terms of governance, the three group structures locked the majority of the cooperative's shares for the nonprofit entity, in order "*to ensure that the commercial activity remained subordinated to the primary social mission*"²². However, all three FTOs recently included non-volunteer people with commercial expertise to govern the commercial entity, either through the Board (Miel Maya and Max Havelaar), or through an advisory group (Oxfam-WW). The inclusion of business expertise at the governance level was required by the collaboration with supermarkets and led to an evolution from a focus on democracy to a focus on expertise. This brought a typical tension in the governance of nonprofits and cooperatives, between volunteers fearing to lose the control on the economic activity, and managers complaining that participation of volunteers slowed down the decision-making in commercial domains (e.g., Cornforth, 2004). One manager asked, for instance: "*Is it necessary and useful that volunteers give their advice on every point of the marketing strategy, on every type of packaging?*"²³ These tensions at the governance level can be seen as organisational implications of broader tensions between two institutional orders (Kraatz & Block, 2008), namely the "foundation" and the "mainstreaming" phases.

At the operational level, the autonomization of the commercial departments of the pioneer FTOs, with distinct managers and governance structures, can be seen, from a neo-institutional perspective, as the result of the fact that they embody the most powerful normative trends of professionalization and market orientation (Meyer & Rowan, 1977). The three group structures differed, however, in the way of managing their coordination. For instance, Max Havelaar had one single manager for the two entities, whereas Miel Maya had two separate managers. Oxfam-WW recently reunified its management through giving to the nonprofit's manager the direction over the whole group. Producer support was shared between the two entities, with specific devices to coordinate the negotiation of the commercial contracts and the wider support to the producers' communities. FTOs having evolved to group structures were the ones with the most numerous partnerships (more than one hundred for Oxfam-WW) and also the most institutionalized. This means that the partnerships existed for a long time, that the purchases were more or less automatic and the relations less personalized. In certain cases, there had been no visits to the producers for several years. The institutionalization of the partnerships also resulted from control by FLO or by a network such as WFTO, but not by the FTOs themselves. Finally, the distribution of the products was done through both worldshops (and other specialised FT shops) and mainstream retailers.

²⁰ In Belgium, the cooperatives members of the « Conseil National de la Coopération » are not allowed to give more than 6% return to their shareholders.

²¹ For a comparison between FT and the cooperative movement, see for instance Crowell & Reed, 2009; Develtere & Pollet, 2005.

²² A manager of a group structure; original quotation in Dutch, author's translation.

²³ A manager of a group structure; original quotation in Dutch, author's translation.

To summarize, type 2 FTOs appeared in a hybrid—some might say “schizophrenic”—situation with one part totally focused on sales and the other dedicated to education and advocacy. This may be seen as a complementary situation. Yet, it may also involve tensions between the nonprofit part—whose strength is its legitimacy and volunteers’ support—and the business part—with its economic power. In this context, the manager(s) and/or of the Board(s) have an important coordination role through taking the decisions and orientations likely to reduce the tensions and to foster the complementarities.

- **New business-form FTOs with a commercial focus (type 3)**

This category corresponds to the typical newcomer FTOs as described in the historical part (“third wave”). In the sample, Emile, Ethic Store, Latino, and Vino Mundo, can be included in this category, as well as Citizen Dream, the first example of this type of FTO. The interviews confirmed that the resources of these FTOs were exclusively commercial. Legal forms were those of conventional companies, and governance was in the hands of the entrepreneur, possibly with a few shareholders who were formally members of the General Assembly and the Board. However, as these shareholders were mainly friends and relatives, and as they were involved more by sympathy for the founder than by expectations of a high return on their investment, there seemed to be a very low control on the action of the manager and on the FTO in general.

Across all business-form and individual FTOs, the entrepreneurs insisted that they were a business rather than a charity and that it was important to state this clearly to the customer and to the commercial partners. This translated into often innovative distribution strategies, using Internet sales, B2B, fairs, etc. The communication to the consumers was generally less based on FT and more on the quality of the products and their fit to the customers’ needs. At the meantime, there was a strong desire to reassure about the “fair deal” for the producers in the South, either through direct and personal relationships (e.g. Latino) or through trading of labelled products (e.g. Ethic Store). For the importing FTOs, newcomers differed from most pioneers in the fewer and more informal partnerships, more based on personalised contacts. In several cases, there were only one or two partners. These partners were not necessarily smaller than the pioneers’ (and in some cases such as wine and garments the partners were the same in pioneer and newcomer FTOs).

Even if profit-making and distribution were not excluded, none of the interviewed business FTOs managed to make regular profits. The focus was rather in making the businesses sustainable, ensuring, in the first place, survival (especially given the likelihood of failures). It is worth noting that most of the FTOs sold a large part of non-labelled products. While none of the entrepreneurs reported a difficulty in convincing consumers of the “fair” nature of their products, there was a clear interest in showing to the other FTOs and FT stakeholders that FT was at the core of their ventures. As a consequence, education and advocacy were peripheral and rarely explicit. For instance, Ethic Store’s entrepreneur developed a personal blog where he commented on recent developments in FT, advocated for his vision and pushed surfers to commit to the broader project of making trade fairer. But this was a side-product of the main website where the focus lied on selling FT products.

- **Newcomer FTOs with mixed forms, goals and activities (type 4)**

This heterogeneous category includes those newcomer FTOs that seem to differ by certain aspects from the business-oriented model of newcomers (see previous category), in spite of common features (commercial resources and innovative distribution strategies). The study showed that legal forms were more diversified than in the previous category, including businesses, cooperatives and individual ventures. Albeit very active from a commercial point of view, these FTOs seemed to pay a stronger attention than business-oriented newcomer FTOs to non-commercial aspects such as close and personalised producer support or explicit involvement in education and advocacy. Tout l’or du monde, for instance, sold FT products in its shop during the day and then welcomed conferences or exhibitions at night, with a somehow higher political content. Of course, this may be considered as “soft” political action, which is moreover connected to the trading activity—some might simply call this marketing. But it is worth noting that, even if their political approach is less radical than most pioneers’ (such as Oxfam-MDM), part of the newcomer FTOs are more explicitly engaged in education and advocacy and are not necessarily more “market-oriented” as what their organisational form and their resource mix might suggest. Also specific is that, unlike most leaders in the previous category, the interviewed managers of type 4 FTOs did not have a commercial education or background.

Let us synthesize the different categories, which represent the most common combinations of the abovementioned variables:

Table 3: Typology of the Belgian FTOs

	Type 1	Type 2	Type 3	Type 4
Examples	Oxfam-MDM, Weltladen	Oxfam-WW, Miel Maya	Citizen Dream, Ethic Store	Satya, Tout l’or du monde
Legal form	Nonprofit	Nonprofit + coop	Business	Variable
Governance	Volunteer-based	Multi-stakeholder	Manager-owned	
Resources	Mixed	Mixed (but separate)	Commercial	
Distribution strategy	Worldshops	Worldshops + supermarkets	Specialized and oriented to mainstream customer	
Producer support	Institutionalized, entails a political dimension	Institutionalized; shared between NGO and business	Personal relationship, with a dominant economic dimension	
Education and advocacy	Explicit priority	Central for NGO	Generally weak	Implicit involvement
Evolution	Decreasing importance	Stable	Increasing	Increasing

It is worth recalling that these categories are based on particular variables and interview data. Nevertheless, the presentation of this taxonomy to the Belgian FTOs, in the context of a feedback on this study, raised much interest. These categories, moreover, are neither exhaustive, nor stable, nor hermetic, nor equal in terms of size.

Only the first two types of FTOs are included in international comparisons such as Krier's reports (2005; 2008). "Type 1" FTOs have become a minority for two reasons. First, many of them have evolved into "type 2" FTOs. Secondly, with the multiplication of newcomer FTOs emerging with other forms and visions, they have gradually become a minority. This situation can also be observed in France for instance (Huybrechts, 2009), whereas in Italy the pioneers (such as CTM) have pushed newcomer FTOs to adopt similar–nonprofit or cooperative–forms and more "movement-oriented" profiles (see for instance Becchetti and Costantino in this issue). In Belgium, it is mainly thanks to the second type of FTOs (group structures) that pioneers weigh the heaviest part of the turnover made by FTOs: around 35 million euros. For type 2 FTOs, however, part of their turnover originates from sales in supermarkets: it is thus impossible to distinguish FTOs and supermarkets in the sales of FT products, as, up to now, they have often intervened on the same supply chains. The "type 2" FTOs are not very numerous, but they are the most powerful actors, thanks to their large sizes but also thanks to their hybrid profiles, which locate them close to both "type 1" pioneers and newcomer FTOs. Such a category of both market and movement-oriented FTOs can also be found, for instance, in the UK with FTOs such as Twin, Divine Chocolate and Traidcraft, in a process described by Doherty and Tranchell (2007) as "radical mainstreaming".

Other initially "type 1" FTOs such as Fair Trade Original can now be categorised as "type 3", in spite of the nonprofit form. Indeed, Fair Trade Original gradually strengthened its business profile, collaborating with mainstream retailers and leaving aside education and advocacy activities. Since 2007, the partnership with Carrefour for the launch of a whole range of FT products gave a major boost to this FTO. It is interesting to observe that Fair Trade Original was an early supporter of newcomer businesses and had invested in Citizen Dream.

Finally, both "type 3" and "type 4" FTOs, mainly created after 2000, are increasingly numerous, which I have previously explained on the basis of the favourable evolution of the institutional context. However, they are still fragile, with small turnovers (rarely over 300,000 euros) and few employees. Although it is difficult to have precise figures on these new FTOs, their total sales can be estimated to approximately 5 million euros and employment to 50 people (including the founders-managers of these FTOs).²⁴ International comparisons regarding these new FTOs are difficult, but it seems that the situation in Belgium is similar to what is described in France (see for instance Ozcaglar-Toulouse et al. in this issue).

4. Rationale and implications of FTOs' networking

Now that the diversity of FTOs has been described and explained, the question is to determine what such diversity entails. Are the diverse types of FTOs competing against each other? Or do their differences constitute opportunities for collaboration? The recent actuality suggests that, in spite of the diversity and the competition between FTOs (for customers, for resources, for legitimacy, etc.), there is an increasing awareness of their common fate and of the benefits of their collaboration. It is worth noting that this argument for unity despite diversity has been developed at the global movement's level by authors such as Nicholls (in this issue), Gendron

²⁴ These figures were collected in the context of the creation of the « Belgian FT Federation ».

et al. (2009a) and Wilkinson, who states: “[i]n spite of the more obvious tensions, there are also unexpected synergies and, it is, precisely, the multifaceted nature of the movement that has accounted for its success to date” (2007:220).

This section analyses the factors and the challenges of networking for Belgian FTOs, particularly in the context of the “Belgian Fair Trade Federation”. Such a networking can easily be described as “institutional entrepreneurship”, in the sense that FTOs are not merely influenced by the broader environment but that they have the ability to shape their field in a way that protects their identity. Institutional entrepreneurship can be defined as “*the purposive action of individuals and organisations aimed at creating, maintaining, and disrupting institutions*” (Lawrence & Suddaby, 2006:224). In this case of an “emergent field” (e.g., Maguire *et al.*, 2004), particularly if we restrict the field to Belgium and to FT as practiced by FTOs, actors are mainly involved in creating and reinforcing their distinctive “institution”, which consists of FT as an exclusive organisational involvement, distinct from the limited focus of corporations and the broader trends of sustainable trade. Let us first examine the factors—both internal and external to the FTOs—that have favoured such a networking.

4.1. Internal factors

4.1.1. Economic difficulties

The collapses of two handicraft FTOs in 2008—Citizen Dream and Emile—and the difficult financial situation of Oxfam-MDM at the same period brought interrogations about the viability of FT handicraft. Parallel with European reflections on the FT handicraft economic model (in the context of EFTA), a study was coordinated by SAW-B, under the impulse of the Walloon Minister of Economy. The main investigator was the founder of Citizen Dream (which went bankrupt precisely during the study). Other investigators were managers of Emile and Oxfam-MDM. This study proposed several trails to improve the sustainability of handicraft FTOs and advocated for concrete public support. Such a support would not take the form of subsidies but rather of investment facilitation, funding for specific workers or tax preferences. The study also recommended the creation of a federation of Belgian FTOs, in order to build economic synergies and reinforce the economic model of FT handicraft and of non-mainstream FT in general. Indeed, most FTOs, even the largest ones at the scale of FT, remain relatively small and vulnerable. The prospect of collaboration has thus clearly been motivated by economic factors.

4.1.2. Legitimacy for newcomer FTOs

For newcomer FTOs that generally deal with non-labelled products, the question of their legitimacy concerning their “fair” nature is particularly crucial. We have seen that it seemed easier to convince consumers than other FTOs and FT stakeholders on this issue. A sign of this quest for legitimacy, in my view, is the fact that Citizen Dream, although being relatively small, asked and obtained IFAT (now WFOT) membership, which made it easier to establish itself in the FT arena. Citizen Dream also developed a multi-stakeholder governance structure including “trustworthy” stakeholders such as NGOs, other FTOs and individual FT supporters. In my view, it is thanks to the legitimacy obtained by Citizen Dream that new

entrepreneurial FTOs have less need to develop their own trust-giving devices, since their specific form and functioning is not an exception any more and is generally accepted by the pioneers (see, however, the next point). Yet, in the interviews, several leaders admitted that they wished to have their “FT trustworthiness” recognised, even implicitly, through the participation to a FT network. This is another factor behind the emergence of the network.

4.1.3. Increasing openness of certain pioneers

Most pioneers, particularly those who adapted to mainstreaming, had already welcomed positively the emergence of the new generation of FTOs. But Oxfam-MDM, in particular, long remained hostile and suspicious, accusing them of low FT standards and profit-making aims. Research in other countries (Huybrechts, 2009) has shown similar reactions in France (several local teams of Artisans du Monde) and in Italy (Agices network excluding “business-form” FTOs). Several entrepreneurs of new FTOs complained that Oxfam-MDM tried to discourage them or to hinder their access to crucial resources. However, as a consequence of its economic difficulties, but also due to changes in its management, Oxfam-MDM changed its strategy regarding newcomer FTOs. Indeed, collaborations with other FTOs were not seen any more as a threat to Oxfam’s political message, but rather as an opportunity to have a stronger influence on corporations and on public decision-makers. Other pioneers such as Weltladen also evolved towards more openness.

The differences among FTOs emphasised in the taxonomy should not hide what they have in common. All of them have FT as their main activity and aim to support small-scale producers through trade. Compared to traditional NGOs, the trading relationship is the main vehicle to provide autonomy and development to these producers. The fair and fixed price, the prefinancing opportunities and the long-term relationship also distinguish FTOs from competing initiatives (such as Efico or Collibri) that give back part of the revenue to charitable projects benefiting the producers. FTOs, on the contrary, wish to implement a trading framework that allows the producers to improve their livelihoods through freely deciding how to take advantage of the better trading conditions. Most of the interviewed FTO leaders also put emphasis on the fact that, contrarily to corporate labels, their partnerships involved producers as owners of their organisations, allowing a democratic control. Finally, although the extent of education and advocacy varies along the FTOs, there is at least a minimal agreement on the need to influence and change international trading rules, conform to the abovementioned end of the FINE definition. All these reasons lead us to suggest that Belgian FTOs clearly have a different vision of development compared to corporations and other actors involved in this area (such as the public agency TDC, as we will see further).

4.2. External factors

4.2.1. Emergence of competing concepts

Since the late 1990s, many concepts, labels or brands emerged with partly similar preoccupations as FT. I already mentioned a range of initiatives launched either by Belgian corporations (Colruyt and Efico) or at the international level (Utz Kapeh, Rainforset Alliance, etc.). Through many other initiatives presenting themselves as “ethical” or “sustainable”

trade, the business world showed its interest in ethical consumption, refusing to leave the niche to FTOs and to subscribe to FT, considered as too demanding for businesses. This vision is carried by the FEB²⁵ (Belgian Federation of Businesses), through its 2008 brochure called “Sustainable Trade”. The FEB is strongly opposed to a law on FT and advocates for a wider recognition of sustainable trade, including self-declared labels and brands. FEB’s vision is shared by the right-wing political party present at the government with several ministers, one of whom is in charge of development cooperation.

4.2.2. Reshaping of the Fair Trade Centre (TDC)

As previously mentioned, a strategic reflection in the sector of public development cooperation led to the reshaping of the “Fair Trade Centre” into “Trade for Development Centre”, translating a vision of producer support that embraces all the possible trading opportunities—with FT being only one of them. We can see the reorientation of the Fair Trade Centre into the TDC as the result of a shift in the Belgian government’s vision of development cooperation—probably also linked to changes in political responsibilities—, vision that is clearly less radical than that of FTOs. As several interviewees suggested, the less exclusive and explicit support of public authorities to FT created an institutional void in terms of representation and support to FTOs. As a consequence, FTOs felt more strongly the need to unite and defend their interests in front of the political world, the businesses and the customers.

4.3. The process and the challenges of networking

Following the presentation of the report on FT handicraft, several meetings were organised by SAW-B in 2008. These meetings led to the creation of the “Belgian Fair Trade Federation” in 2009. Initially gathering French-speaking FTOs—a consequence of its support by the Walloon Minister of Economy—, the federation aims to open its scope to all Belgian FTOs in a near future. It is worth noting that Max Havelaar has not been included in the federation, because of its distinctive role of labelling. Thereby, most FTOs, licensees or not, wished to avoid agreeing explicitly with the exclusivity of Max Havelaar as the only FT label, especially in a context in which other labels emerge with the same FT specifications and are recognised by FT networks (see for instance Ecocert that is now recognised by the French FT platform²⁶). Moreover, labellers were excluded because of the possible conflicts of interests that their membership could entail. Another interesting observation is that the definition of FT and the membership criteria for FTOs were based on the WFTO criteria. The federation could furthermore ask WFTO membership, thereby bringing a concrete answer to the abovementioned quest for legitimacy of small, newcomer FTOs for whom it would be costly to adhere individually to this international network.

Concerning the missions and tools of the federation, they include the following:

²⁵ Fédération des entreprises de Belgique.

²⁶ Plate-Forme pour le Commerce Equitable ; see <http://www.commerceequitable.org/membres0/>, viewed on September 8, 2003

- Creation of a meeting place where FTOs can discuss common challenges
- Organisation of trainings for FTOs in diverse fields of management (marketing, accountancy, supply chain management, etc.)
- Representation of FTOs towards public authorities, and advocacy for public support for FT in terms of legislation but also, for instance, financial support (e.g. public loans for FTOs)
- Common promotion of FT towards the public opinion, consumers, civil society, etc.

The successful launch of the Belgian FT Federation was possible thanks to the involvement of a number of actors who can be considered as “institutional entrepreneurs”. Dorado (1999) suggests three types of institutional entrepreneurs: innovators, engineers and catalysts. The first two roles are performed by insiders to the field, while catalysts are often external actors who intervene to concretize the institutional evolution (Dorado, 1999; Hinings *et al.*, 2004). In this case, the latter role was played by SAW-B, whose leaders were particularly keen to protect and reinforce FT as an exclusive organisational involvement, in the context of the broader field of the social economy.²⁷ Following the report on FT handicraft, SAW-B contacted the FTOs, organised the first meetings and hosted the federation during its launch. To achieve this, SAW-B used its experience of networking in other sectors of the social economy²⁸ and adapted it to the specific features of FT. From a different perspective, the retreat of the former “Fair Trade Centre” can also be seen as a catalyzing event, because it created an “institutional void” that needed to be filled by FTOs themselves.

Secondly, small newcomer FTOs who were particularly enthusiastic about this federation could be described as innovators. Indeed, they introduced new forms and practices that contributed to renew and make accessible FT as a core organisational focus. Citizen Dream, in particular, can be seen as an innovator who, despite its own failure, promoted the involvement of entrepreneurs in FT. Finally, pioneer FTOs, while also having developed innovative organisational avenues for the FT activity (the case of the group structures is the most striking example), could rather be described them as the institutional engineers, defined as “*powerful gatekeepers who affect the flow of resources in a field*” (Hinings *et al.*, 2004, p. 309). Such resources are numerous: legitimacy, economic weight, public recognition, anchoring in civil society, international contacts, etc. Although the status of legitimacy as a resource can be discussed (see for instance Suchman, 1995), it seems clear that the legitimising role of the federation for newcomer FTOs could only be fulfilled thanks to the presence of the pioneers, especially the Oxfam’s. Oxfam-MDM and Oxfam-WW clearly appear as gatekeepers, without whom the federation would have lacked credibility. As members of WFTO and EFTA, these two FTOs have also brought an international recognition of the federation.

The different types of FTOs, as well as SAW-B, can be considered as institutional entrepreneurs who have contributed to structure the field of FTOs and to defend their exclusive commitment to FT. Such structuration appears even more crucial, not only because

²⁷ For an analysis of the links between FT and the social economy, see for instance Lévesque (2004), Poncelet (Poncelet, 2005 #672) and Huybrechts (Huybrechts, 2009 #1567).

²⁸ E.g. work integration, recycling, etc.

of the multiplication of the providers of FT goods, but also, as already mentioned, because of the emergence of rival concepts of “sustainable trade”. The latter’s promotion by the Trade for Development Centre, in the context of a broadening of its missions, made the networking of FTOs even more urgent.

Of course, the collaboration of such diverse FTOs remains a huge challenge. As in other federations, decisions about common strategies and individual contributions of the members to the federation’s budget already appeared difficult. FTOs have different expectations towards the missions of the federation and the nature and the amount of elements they accept to share with other FTOs. As previously mentioned, they also compete with each other, especially those dealing with the same types of products. But more fundamentally, the multidimensional nature of FT (including trading, producer support, advocacy, etc.) makes it even more difficult that the diverse types of FTOs, in spite of a common definition of FT, have different interpretations and applications of it. The first meetings, and many of the interviews, already showed the tensions between those who focus on FT as a business and those who have a broader view including education and advocacy. One crucial issue was the membership criteria: even though all FTOs agree on the basic principles of FT, there is more disagreement about when an organisation can be qualified as “Fair Trade”. A typical discussion concerned the minimum percentage of FT products that an FTO should deal with: although we speak of “100% FT”, several FTOs (especially the retailers) have a small percentage of organic, local or ethical products that are not strictly speaking “FT”. Other tensions also appeared between small and large FTOs, and between retailers and FTOs that also import directly from producers. But at this stage, it seems that the institutional context and the external threats highlighted in this section have been a powerful driver for networking, which has allowed to overcome—without erasing—the differences among FTOs.

5. Conclusion

This article has tried to depict the evolution of FTOs in Belgium, focusing on the double movement of diversification and networking. Using a neo-institutional perspective, we have examined how pioneer FTOs launched the FT movement in the 1970s and 1980s and gradually built its reputation, developed its economic model and established links with NGOs and the civil society. Most pioneers emerged and remained as volunteer-based nonprofit organisations. The creation of Max Havelaar Belgium in the late 1980s, followed by the distribution of FT products in the mainstream, expanded the size and scope of the sector and pushed the pioneers to adapt in the sense of a stronger professionalization of the business activity. The reluctance of public authorities to fund such business activity and the emergence of new businesslike FTOs reinforced this trend and increased the organisational diversity of FTOs. More recently, a growing number of FTOs emerged, founded by individuals with a stronger commercial profile and a focus on innovation and risk-taking. This was analyzed as reflecting values associated to (social) entrepreneurship.

Combining age, organisational form and strategy, I have suggested four categories of FTOs. Instead of a single opposition between pioneers and newcomers, a more subtle diversity has appeared in the forms and ways of undertaking a FT activity. The pioneers seemed quite

clearly divided between, on one hand, those that remained with a volunteer-based, nonprofit form and an alternative profile, and on the other hand, those that evolved towards a combination of an NGO and a business, following a set of strategic and institutional influences. Newcomers could not so much be distinguished on the basis of their organisational form (mainly an entrepreneurial one) or distribution strategies, but rather on the extent to which they have an organizational commitment to education and advocacy.

The diversity among FTOs did not seem to be an obstacle to their networking. I highlighted a number of factors that pushed the diverse types of FTOs to unite. These factors included, among FTOs, the difficult economic situation, the quest for legitimacy of newcomer FTOs and the more open behavior of pioneers such as Oxfam-MDM. In the broader institutional environment, the emergence of “sustainable trade” initiatives and the latter’s support by the TDC also appeared crucial. Indeed, the shift in the mission of the TDC created an institutional void that rose the awareness of FTOs in terms of the necessity and the urgency to collaborate. Such collaboration took the form of a federation of FTOs, coordinated by a social economy platform and aiming to support its members and to represent their interests. This platform, as well as the diverse types of FTOs, all acted as “institutional entrepreneurs” contributing to structuring their field and emphasising their specific features towards other actors dealing with FT, towards competing non-FT initiatives and towards the government. Several internal and external factors played a role in overcoming the differences in FT practices and the competition among FTOs.

This article aimed to shed light on the diversity of FTOs in Belgium and on the challenge of their networking. Such a focus did not allow, of course, to deepen other issues that would be worth analyzing, such as corporate involvement or the role of public authorities. Moreover, although several FTOs were followed during many years with formal and informal interviews with various people, the information on certain FTOs—especially the newer ones—was more limited to one period of time and to the leaders’ view. Finally, as already mentioned, the taxonomy was based on the Belgian FTOs: while I could find illustrations of similar categories in other countries, there are certainly other types of FTOs that are not well represented in Belgium (for instance FT businesses created by NGOs, as is the case of Cafédirect and Divine Chocolate in the UK). Further research comparing the situation and the structuration of FT in different countries, beyond the mere comparison of the general figures, market shares and weight of the different actors is certainly needed, comparing for instance the roles and interactions between pioneer and newcomer FTOs. This would allow academics to contribute to a more refined vision of the FT landscape, based on the local situations which, as I have tried to show in the Belgian case, are more subtle and complex than what global, international analyses of the movement suggest—typically the divide between FLO and WFTO. In other words, for future research on FT, I would advocate for more “bottom-up” analysis that builds a global picture of the movement based on its different local situations, institutional contexts and power plays.

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