

# SUMMARY

## Of the Follow up Study – Assessing the Impact of Fairtrade on Poverty Reduction through Rural Development

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**Saarbruecken, August 21<sup>st</sup> 2018**

**Commissioned by Fairtrade Germany**



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## List of Abbreviations

BT	Bacillus Thuringiensis (soil bacterium used to genetically modify cotton)
CEval	Center for Evaluation
CI	Community Interview
COSA	Committee for Sustainability Assessment
CP	Contract Production
FGDs	Focus Group Discussions
FLO	Fairtrade Labelling Organization
FT	Fairtrade
GMO	Genetically Modified Organism
HL	Hired Labor
KII	Key Informant Interviews
NGO	Non-Governmental Organization
PO	Producer Organization (generic term for CP, HL and SPO)
SECO	State Secretary of Economic Affairs, Switzerland
SPO	Small Producer Organization
ToC	Theory of Change
TransFair e.V.	Officially registered name of Fairtrade Germany
VSS	Voluntary Sustainability Standard

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## 1. Introduction and Rationale

For the second time, Fairtrade Germany and the Max Havelaar Switzerland Foundation, now jointly with Fairtrade Austria and the Swiss State Secretary of Economic Affairs (SECO), commissioned the Center for Evaluation (CEval) to conduct a study aiming at identifying the contribution of Fairtrade (FT) on poverty reduction through rural development. The study was a follow-up impact research to the study published in 2012<sup>1</sup>, assessing longitudinally the changes that occurred towards the findings back then. It included the same products (i.e. banana, cocoa, coffee, cotton, flower and tea), producer types (i.e. Small Producer Organizations (SPO), Hired Labor (HL) and Contract Production (CP)), and countries (i.e. Peru, Ghana, Kenya and India) as the 2011/12 study.

Fairtrade is not only an alternative approach to conventional trade, it can also be considered a strategy for poverty alleviation and sustainable development through guaranteeing the payment of at least a minimum product price (based on the methodological approach of the “costs of sustainable production”)<sup>2</sup> and of a defined additional development premium as well as ensuring democratically organized workplaces, technical assistance, social programming and environmental protection, inter alia. Its purpose is to create opportunities for producers and workers, who have been economically disadvantaged or marginalized by the conventional trading system. One central element of the Fairtrade system are the standards which are set by the Fairtrade Labelling Organization International (FLO)<sup>3</sup>. These standards comprise social, economic and environmental requirements and aim at improving the working and living conditions of farmers and workers in the Global South. Goods produced adhering to the standards can be sold under the FT label. For these products at least, a Fairtrade Minimum Price is paid (with some product-specific exceptions). If, however, the relevant market price for a product exceeds the guaranteed minimum price then at least the market price must be paid. In addition, a Fairtrade Premium is paid, which the producers can spend on democratically agreed development projects.

Which changes in rural development can be observed and to which extent FT certification contributes to these changes poses the central interest of the follow-up study. To this end, a theory-based contribution analysis was applied, taking into account FT’s Theory of Change (ToC) and 16 research areas within the economic, social and ecologic dimensions of sustainability according to the COSA indicators. Further, the study follows a case study approach, allowing comparisons between cases and across time. Data collection across the six different contexts took place between October 2017 and January 2018.

The publication at hand presents a summary of the full report.

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<sup>1</sup> Please find the study [here](#).

<sup>2</sup> This approach ensures as much as possible that the „costs of sustainable production“ for producers are covered, i.e. contributes significantly to avoid cost externalization to the disadvantage of producers. FT is the only VSS with this requirement.

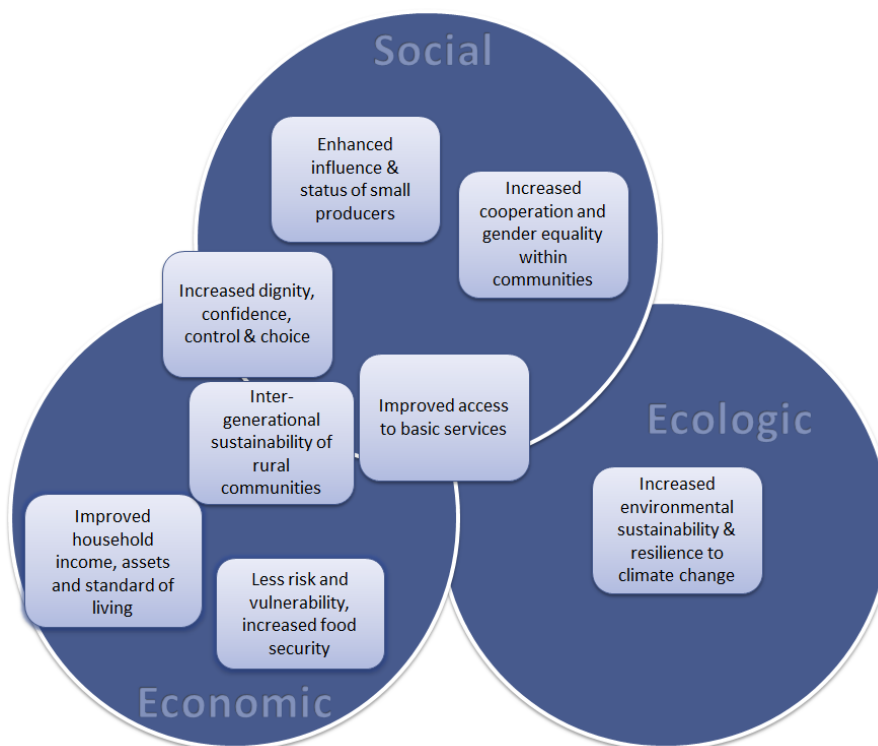
<sup>3</sup> Today usually referred to as Fairtrade International (FI).

## 2. Study Setup: A Comparative Case Study Design

Building upon the well-documented qualitative case studies from the 2011/12 study, a **comparative case study design** was implemented. It consists of the case studies (i) banana in Peru, (ii) cocoa in Ghana, (iii) coffee in Peru, (iv) cotton in India, (v) flowers in Kenya and (vi) tea in India. While cocoa, banana and coffee represent SPOs, cotton falls under contract production (CP) and tea and flowers represent the HL settings. To assess potential developments for FT certified target groups (i) two different points in time (2011/12 vs. 2017/18) were taken into consideration. In addition, (ii) differences between target groups and comparison groups were assessed based on data from 2017/18.

The current study draws upon the theoretical foundations provided by **Fairtrade’s Theory of Change (ToC)** and the **systematization of the COSA indicators**<sup>4</sup>. As the ToC is the theoretical impact model of FT’s work, it provides a guiding framework for the assessment of impacts on and beyond FT POs. For the producer settings investigated in this study, eight impact areas are differentiated by FT’s ToC<sup>5</sup>. While covering different aspects of rural development, they can be attributed to the **three dimensions of sustainable development**, as depicted in Figure 1.

Figure 1 - Social, economic and ecologic dimensions of sustainable development and impacts of Fairtrade’s ToC



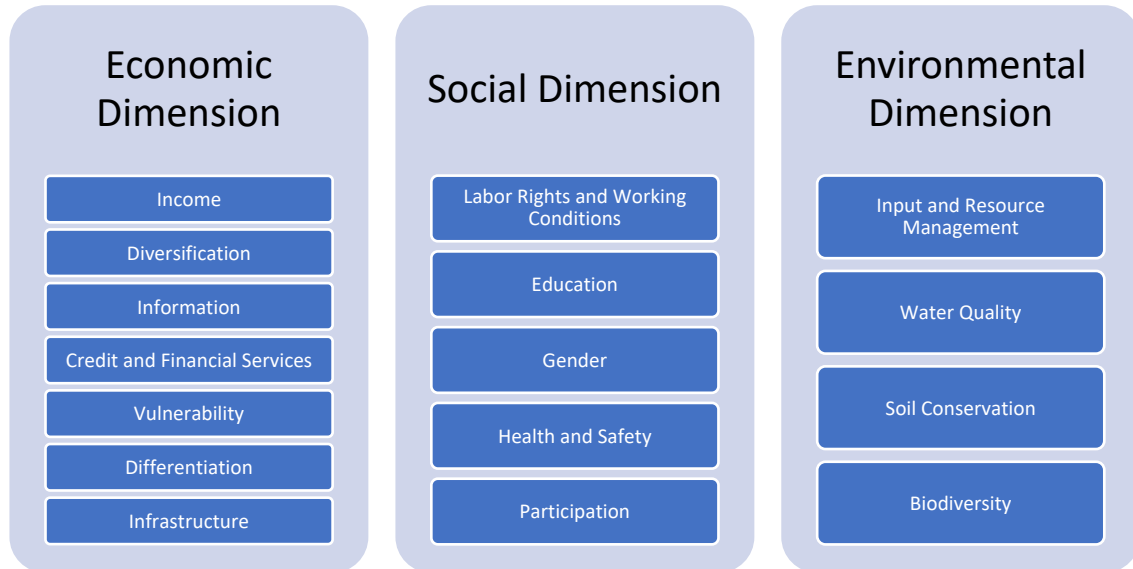
In order to allow for research on the contribution of FT to these impact areas, the current study draws upon the **systematization of the COSA indicators**. As this set of indicators had already provided a basis for data collection and analysis in the predecessor study of 2011/12, the approach was also beneficial for ensuring continuity between the two studies. By definition, the COSA indicators are also organized by the three dimensions of sustainability – the economic, social and

<sup>4</sup> [Link](#) to Committee on Sustainability Assessment (COSA).

<sup>5</sup> Please refer to Figure 10 and Figure 12 of FT’s ToC, which can be found [here](#).

environmental. Contextually related indicators are further clustered into research areas within the respective dimension in order to guide more focused research. Consequently, data collection and analysis of this study were structured along these three dimensions:

Figure 2: Research areas of the study according to COSA indicators

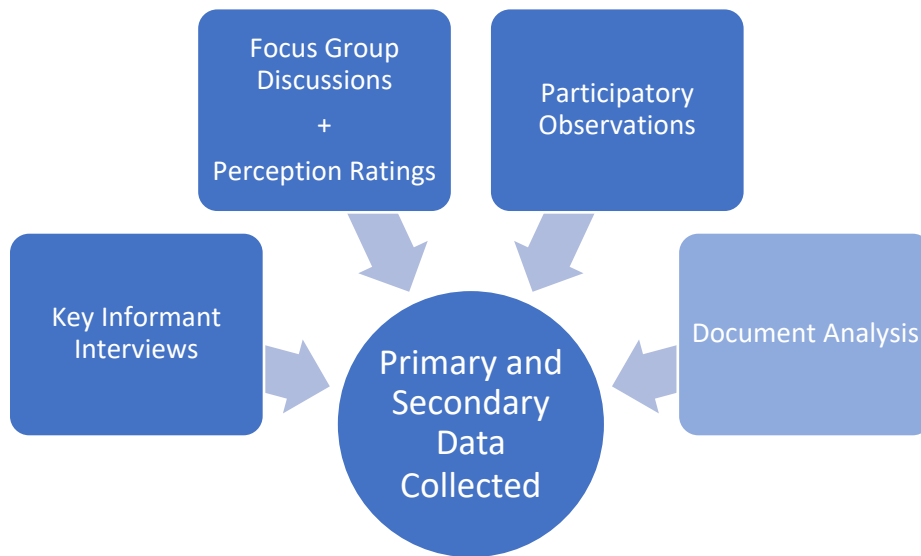


**Data collection** for this evaluation drew on a number of different data sources. These included secondary data of FT in general and for the selected case studies, as well as the collection of primarily qualitative data. Primary data collection was based on three complementing pillars: Key Informant Interviews (KII) with FT management and community representatives, participatory observations and Focus Group Discussions (FGDs). Furthermore, all FGD guidelines entailed a general assessment of the participants’ perception in regard to the social, economic and ecologic dimension (Figure 3). For this assessment the research team went beyond the typical set-up of FGDs and applied a **quantitative seed assessment**. FGD participants were asked to assess their today’s and past satisfaction towards their social/economic/environmental situation on a scale from 1 to 10 where 1 stands for very low standard and 10 for excellent standard<sup>6</sup>. Secondary data comprised the FT Theory of Change (ToC), the COSA indicators, the 2011/12 study and underlying case study reports, as well as relevant publication and research studies on FT in general and the specific POs visited.

**Data analysis** was based on the COSA indicators and the respective research areas. Qualitative data underwent qualitative content analysis while quantitative perception data was analyzed by applying descriptive statistics.

<sup>6</sup> The detailed questions asked comprised, for instance, “How satisfied are you with your quality of life (social situation) today?” and “How satisfied were you with your quality of life (social situation) five years ago?”. To facilitate the retrospective queries, points of reference were given, such as “... when XY was president” or “just before the event of XY”.

Figure 3: Data Collection of Impact Study



### 3. Fairtrade and Rural Development: Key Findings from Six Case Studies

In order to do justice to the rather heterogeneous case studies, central findings are initially presented on a case-by-case basis, before turning towards a comparative perspective. Thereby particular emphasis is placed on addressing key results for the economic, the social and the environmental dimension.

#### 3.1 The Banana Case

In the **economic dimension**, FT contributes to a great extent to the strengthening of SPOs in the *Chira Valley*, as, thanks to the premium, infrastructure investments, which improve productivity, leverage economies of scale and improve efficiency in processing, are made collectively – something single farmers by themselves could hardly acquire. In general, FT organizations today are also found to have access to better sales prices for their produce on export markets. SPOs are hence not only central to help producers reduce costs and improve productivity but also realize higher revenues.

Income stability for most FT farmers has further improved since banana exports began 10 to 15 years ago and consequently most banana farmers spend all their productive time growing banana. As only a minority is engaged in complementary income generating activities, the greater part is rather vulnerable to external shocks affecting the banana sector. While strong FT cooperatives are capable of supporting their producers in such emergency situations (e.g. caused by the El Niño phenomenon), non-FT cooperatives state to not have the means to provide similar support. This became apparent in the aftermaths of the 2017 flooding of the *Chira Valley*, when FT producers received support thanks to the FT premium and the government. Producers in non-FT organizations, on the other hand, did not receive support from their SPOs or the State. Furthermore, rising competition through large-scale plantations were acknowledged by both FT and non-FT cooperatives as major threat, which could jeopardize small scale *bananeros* of the valley in the future.

FT members are increasingly capable to invest in the education of their children, their housing and mobility and this has not only brought changes to their households but to the entire reputation of the villages. Nevertheless, there is almost no saving among banana farmers and apparently small



price variations can be decisive for a farmer to achieve savings. Most FT SPOs are able to provide loans with certain limits to their members.

In the **social dimension**, it can be identified that some banana cooperatives have turned into important actors in local development. While misunderstandings between FT SPOs and local education and health institutes appeared in the predecessor study, today smooth and fruitful relations between the SPOs and community are found and FT SPOs attempt to provide for instance some basic health services to their members. Furthermore, attempts to design more impactful projects can be identified in two FT SPOs.

While in the 2011/12 study, high occurrence of *machismo* was revealed, the situation has partially improved in the last five years: Women appear to show enhanced participation and self-esteem and also claim to have increasing say in their households. Yet some women are still unsure about participation in the SPOs in general and trainings offered to SPO associates in particular.

Overall, the years of schooling of the population have increased for the children of both FT and non-FT producers, due to greater coverage of free public education. The FT certified SPOs were more supportive of schools in the area in the past, although they were ad hoc supports (e.g. roofing, sports platform). In addition, it can be observed that producers who export (with or without FT certification) are more likely to finance higher education than producers who only sell on local markets. Despite these improvements, some FT farmers, however, have perceived a decrease in social satisfaction. One central reason mentioned was that that precisely due to improved education and job opportunities, many children move away from the villages, which leads to the separation of families. While decision making processes are defined and in place according to FT standards, low education levels limit understanding of FT mechanisms and lead to lack of viable proposals in assemblies.

In the **environmental dimension**, the study revealed that climate change already impacts on the resilience of producers and will do even more so in the future. Water shortage still remains one of the most pressing problems for the farmers and the adjacent communities, as the nearby water reservoir is about to be exhausted. The FT premium has enabled measures on water and waste management as well as awareness trainings on soil erosion and the economic consequences of this phenomenon.

### 3.2 The Cocoa Case

Looking at **economic indicators** in the cocoa case, FT cocoa farmers generally reported higher incomes than their non-FT counterparts, which stands in close relation to yield enhancement and reduced costs for farm inputs, as these are partially provided by the cooperative. Indeed, in the 2011/12 study it was observed that the traditionally low productivity in the Ghanaian cocoa sector had improved – a development that was again stressed for FT cocoa farmers in this follow-up study. The main driver for this can be seen in the effective system of farmer trainings, which are facilitated by the FT premium. Further trainings on alternative livelihood activities are also highly valued, especially by female cocoa farmers. Yet long-term social impact of these investments remains to be an issue.

Overall, the farm-gate prices cocoa farmers are entitled to is very transparent to FT and non-FT cocoa farmers. Yet this is not equally the case for additional (government and cooperative) benefits and bonuses. Due to the specific setup of the Ghanaian cocoa sector and relatively stable farm gate prices guaranteed by the government, farmers' vulnerability is currently not strongly affected by

world market fluctuations. In turn they are highly dependent on the goodwill and financial capacity of the government.

In contrast, the issue of limited access to loans for cocoa farmers unfortunately remains unresolved with potential negative implications for sustainable cocoa farming in general. In this situation other actors are starting to come up with alternative solutions: One company recently advertised making necessary major investments on people's cocoa farms during a three-year period. In this time farmers would practically be employed on their own farms and obliged to sell their produce to the company. In their desperation to open up major investments even FT farmers might be inclined to turn away from the cooperative union. What is more in this situation, cocoa farming in Ghana may also see a workforce shortage in the medium to long term, as farmers' offspring increasingly turn towards more attractive job opportunities and "white collar jobs".

When looking at **social indicators**, the existence of child labor was identified as a problem five years back, but in the current study no cases were identified or discussed as on-going practice in the FGDs. While children's engagement in farm work within the legally permitted boundaries is quite common, awareness on the issue of illegal child labor and its importance has definitely increased among FT farmers due to systematic sensitization measures. Consequently, however, the possibility of cautious response behavior has to be acknowledged.

Current cocoa farmers have attained lower education levels than their offspring but benefit hugely from various regular trainings provided by the cooperative. Today, FT cocoa farmers feel confident to share their newly acquired knowledge and non-FT farmers even turn to them for advice.

In terms of participation it was found that thanks to such ongoing trainings, five years later, farmers also show better understanding on FT decision making processes. FT cocoa farmers are aware of the rights they have within the cooperative and participation in the cooperative union continues to be strong. It is noteworthy that FT induced groups are usually the only community development groups present in the villages. Generally, also the number of women in the cooperative and in leading positions is increasing. Furthermore, women seem to be vocal and their opinions valued in the cooperative union.

One focus of capacity building is the implementation of **environmental awareness** raising measures on sustainable agricultural practices, which have been continued and were progressively extended by the FT cooperative over the last years. They continue to be one of the most valued benefits received from being a cooperative member. Yet still, in terms of potential detrimental effects of (excessive) pesticide use, health hazards were of greater concern to farmers than environmental issues.

Climate change on the other hand is increasingly being recognized as negatively affecting cocoa farmers. This was especially voiced by male FT farmers.

Turning towards more complex matters like soil quality or biodiversity, these do not yet appear to be clear or thoroughly understood by the majority of smallholder farmers: Even though FT cocoa farmers know that it can be beneficial to adopt certain environmentally friendly farming practices (e.g. grow shade trees) they were rather oblivious to the more complex effects beyond higher yields, like soil conservation or contribution to biodiversity.

### 3.3 The Coffee Case

Coffee farmers in the Peruvian *Chanchamayo* province have experienced a range of setbacks in the last five years, with considerable effects in the **economic dimension**. The most prevalent crisis they encountered was the emergence of *La Roya* – coffee rust – a fungus, whose epidemic spread is widely perceived as a climate change effect, and that has aggressively destroyed coffee plants. This led to a dramatic loss of plants and parcels across the Amazonian region. At the same time, the price for coffee in the world market dropped drastically and internal issues at the FT cooperative led to bad managerial practice and distrust among producers. A contract taken up could not be fulfilled due to lower production volumes during *La Roya* and resulted in a penalty payment, which represents a heavy economic burden for the FT cooperative until today. Negative consequences caused by climate change were not shared equally among supply chain actors but solely borne by the cooperative. Consequently, 50 % of the FT premium is currently used to pay back debt.

Furthermore, the occurrence of ‘ghost-cooperatives’, set up by local companies who list members that do not actually exist, while instead sourcing from the street, represent further illegal competition for the FT cooperative. The current price received by FT farmers of the target cooperative for one kg of parchment coffee of sufficient quality is only half the price of what it was in 2011. There are farmers who know approximately how prices are calculated and understand what they must do to receive better prices and the FT benefits. In contrast, other partners, especially women, are less educated on the subject. The efforts made to inform members, such as information provided at assemblies and trainings, are therefore important. Awareness on the diversification of income sources for both FT and non-FT farmers has increased during the crisis but is still too low to enable living income for farmers in the region.

Both FT and non-FT farmers had to take up credits by the Peruvian governmental bank and are in debt today with pay back starting from this year’s harvest on. With continuously low prices and few hectares in production, there is a high risk of loan default with potentially severe consequences for the farmers and the involved institutions.

Social satisfaction is strongly correlated with the economic situation, and **social indicators** showed that, compared to five years back, farmers appear to have experience a decline in self-confidence and pride and have lost trust in the promise of coffee. Feelings of helplessness, fear and despair are prevalent among all coffee producers and young people increasingly migrate from the countryside to seek opportunities in the cities.

The women’s committee that was well functioning during the last study, is no longer active, resulting in a lack of women-directed trainings in the FT cooperative. However, there have been gradual improvements: there are women in the local committees as administrative staff, and it was established that the Board of Directors should include at least one woman. Nevertheless, despite their precarious situation, the FT cooperative continues its operations and has been able to set-up a Public Private Partnership (PPP) to implement a holistic vocational training course, which goes far beyond the support they provided in 2011. Such further education efforts by the cooperative are highly valued by the farmers, especially if conducted in simple language and with field trainings. The FT cooperative visited is characterized by an established structure and rather regular member participation. Despite the named economic and managerial challenges, FT farmers still identify with their association to a greater extent than the non-FT cooperatives visited.

In the **environmental dimension**, the 2011/12 study concluded increased awareness regarding environmental practices (e.g. composting), mainly due to trainings under UTZ and Rainforest Alliance certification. This trend continues as FT farmers stick to environmental policies established by the cooperative. In contrast, non-FT farmers stated to have resumed damaging practices such as burning of fields. However, the current bad economic situation has begun to set back environmental conservation measures even among the FT cooperative's members. The difficulty in accessing fertilizers causes farmers to slowly migrate and cultivate forest land, where they find virgin soils with nutrients. In the long run, this has serious environmental impacts and consequences for the entire community.

Lastly, in the current study, all farmers complained about changing weather patterns, leading to heavier rain and stronger sunlight. Weather related issues caused by climate change were less prominently mentioned during the last study. It seems that climate change has not only begun to affect the growth cycle of coffee but has also prepared the way for the first major catastrophe in the sector, the crop failure due to *La Roya*.

### 3.4 The Cotton Case

Looking at **economic research areas** in the cotton case, it could be shown that income for the FT organic cotton farmers was reported to be higher than for the non-FT, BT cotton farmers, both in 2011/12 and in the follow-up study. However, while the FT group in the 2011/12 study was characterized by higher productivity, this was not echoed in the follow-up study. Income differences were rather driven by higher crop purchase price and lower production costs through the provision of farm inputs (e.g. provision of seeds, picking up crop at the farm) with the help of the CPO scheme. Besides these purely economic benefits, the set-up of the FT CPO also allows farmers to be more independent from multi-national agriculture companies, which is certainly an important factor for greater empowerment.

As cotton production is generally the main source of income, in times of drought farmers face big cuts in their available household income. This situation is even more aggravated for non-FT farmers, which in contrast to FT cotton producers have to purchase all agricultural inputs such as seeds and fertilizer on their own. Consequently, the majority of infrastructure development facilitated by the CPO and more specifically the FT premium, are measures in the field of improved water provision. Currently, there is a drip irrigation project being spearheaded as public private partnership (PPP) project between the CPO and the government. In addition, several small-scale projects, often also in the field of water supply, have been facilitated by the CPO (water boreholes, water tanks, reverse osmosis, pond construction).

While FT farmers generally agree that they get a better price with the CPO than on the market, discussions with the FT farmers however suggest that decisions on pricing and the FT premium are not thoroughly transparent to all farmers. This was even more noticeable in discussions with women, speaking to a prevalent gender imbalance in this specific context. Recently, the CPO has turned towards disbursing farmers by transferring the money to their bank accounts instead of paying them cash. As a consequence, FT farmers and management report a moderate increase in savings among FT cotton farmers.

In the **social dimension** it was identified that, unlike in the last study, awareness on the issue of child labor and the importance of education has risen among FT farmers, while this does not seem to be

the case for non-FT cotton farmers who allegedly admitted that children are helping out on the field. Gender bias, being deeply rooted in regional traditions and practices, is still an issue, but, at least girls' scholarships, provided by the FT premium, aim at increasing the number of female students pursuing higher education. While access to public primary education up to 8<sup>th</sup> grade is given, the quality of education raises cause for concerns. Consequently, youth in the region still suffer from low education levels, lack of opportunities to pursue a career that matches their interest and skills beyond farming. As secondary schools are rarely found in rural areas, children have to move away from their villages to acquire their desired education. According to FT farmers, their children's aspiration is to have white-collar jobs in the cities rather than working on the farm.

While continued education trainings and capacity building measures on topics like seed use, technology, the production of organic fertilizers as well as Fairtrade standards and premium use are regularly held, overall attendance and specifically female participation often is an issue. On that note, it was stated that women never take part in trainings given by the organization. Reasons mentioned include their shyness and lack of understanding due to low levels of education. Their level of participation and engagement in the organizational structures of the FT organization is, thus, substantially lower compared to the men of the villages. Management level at the FT PO does not count any women either.

FT cotton farmers confirmed that there is a good relation with the FT producer organization and that they are able to articulate their views during the meeting. This is mirrored impressively in the transition from the CPO setting towards an autonomous SPO that has been completed in March 2018.

In terms of the **environmental dimension**, water scarcity clearly remains one of the most pressing problems for both FT and non-FT cotton farmers. Acknowledging this need, a drip irrigation project is on the verge of entry. As the producer organization is not only FT-certified since 2008 but has been set up around organic farming practices from the beginning, all farmers selling to the producer organization adhere to organic farming techniques. Hence, awareness about the benefits of environmentally friendly farming practices for the whole community continues to be much higher among organic FT cotton farmers. Due to organic farming practices, which are actively promoted by the FT organization through trainings and dedicated personnel on the ground, soil quality has improved, water usage decreased and input costs, for e.g. insecticides, are lowered.

### 3.5 The Flowers Case

In terms of **economic situation**, similar to the 2011/12 study, workers of visited flower farms complained about disproportionately high living costs, especially increasing food prices, which were not reflected sufficiently in their wage increases. While there have been improvements in wages in the last six years, in line with Fairtrade's respective HL standard, they do not yet resemble the suggested Global Living Wage for the Kenyan horticulture sector. Political instability, gentrification and increasing competition with Ethiopian Flower Farms have recently exacerbated this perception. In this situation, additional allowances, e.g. for housing or food, make an important contribution to workers' incomes. Besides, the vast majority of flower workers run side business, to top up their income from farm activity. Capacity building measures on alternative livelihood sources, such as trainings on hairdressing or general bookkeeping, which are facilitated by the FT premium, contribute greatly to this income diversification.

FT farm employees also have access to two different credit schemes which generally grant workers a good access to credit and financial services. First, there is a loan scheme financed by the Fairtrade Premium. The other institution is a credit circle scheme which had been initiated by the workers themselves. Thanks to these highly valued institutions, workers can not only acquire loans to start side businesses but also access funds for investing in housing or education.

Workers on the flower farms display a good knowledge of the Fairtrade System and flower exporting procedures. As the market for FT roses has been stagnating recently and competition is increasing, it was argued that the FT flower market should be extended and other sales opportunities should be explored. Nevertheless, workers show strong trust and confidence in the role of unions and worker representations and their ability to shape working conditions for the benefit of flower workers.

Turning towards the **social dimension** the wide majority of farm workers is represented through unions, which have considerable weight versus the management of the flower farms. In this regard, the Freedom of Association Protocol under the HL-Standard has strengthened the role of workers' unions tremendously. This in turn is associated with greater job security and involvement in decision making among FT flower workers. Furthermore, FT farm representatives participate in rural development activities through the body that manages the FT premium. At non-FT flower farms comparable bodies engaging workers do not exist.

Both, five years ago and today, the FT flower farm in Kenya provides educational support in the form of bursaries financed by the FT premium and has enhanced the scope of education activities aiming at benefitting the whole community. There is however increasing potential for disagreement over who should benefit from these scholarships as different understandings of the purpose of the FT premium – extra personal income for workers vs. premium for community development – prevail. The non-FT farm examined also invested in single education initiatives, but these were solely directed at their workers and did not show larger impact at community level.

With non-discrimination measures and local gender committees in place, workers were not aware of systematic discrimination because of their gender and stated that it was equally possible for women and men to be promoted to supervisor positions. By farm policy, a pair of supervisor and assistant supervisor always needs to be of the opposite sex; yet it is still more likely to find a pair of male supervisor and female assistant supervisor, despite a majority of farm workers being female.

Overall, The FT farm was unanimously characterized by their good reputation regarding working conditions. This is underlined by a system of medical services, regular check-ups and health insurance for the workers, which are provided at the FT farm locations. Furthermore, personal protective equipment is provided to protect workers from e.g. permitted chemicals and pesticides.

In the **environmental dimension**, environmentally friendly agricultural practices such as prohibition of waste burning, use of micro-organisms for soil protection, compliance with criteria for occupational health and safety (regarding use of pesticides) and composting of green waste are still in place and implemented. Furthermore, the FT farm has stepped up and continued its efforts regarding water management and preventing pollution of water bodies, as erratic rainfall patterns and droughts diminish water resources and hence severely affect communities and farms. By FT regularizations, farms and communities have to negotiate the rules for using the scarce resource of water. Regular FT audits continue to assist adherence to existing national regulations.

### 3.6 The Tea Case

In the tea case, no suitable non-FT comparison group could be identified and thus only a longitudinal comparison over time of one FT tea garden was conducted. With respect to **economic indicators**, the study must acknowledge that in accordance with the *Plantation Labour Act* tea pickers are still paid below the agricultural minimum wage as had been the case at the time of the 2011/12 study. However, compared to 2012, the daily salary has increased significantly from 90 INR to 132,5 INR. Trade unions have been pursuing a minimum wage for the Indian tea sector, but the Government of West Bengal does not seem to act in this regard. Wages for workers with a permanent contract<sup>7</sup>, which applies to most workers, are paid year-round, thus workers also receive the same income during the rather unproductive months from November to February. Besides the daily wage, workers receive further benefits (e.g. free housing, subsidized food, allowances for buying shoes and work equipment). While this in-kind provision certainly yields benefits, the quality of housing or medical services and the money provided for equipment purchases<sup>8</sup> was often considered insufficient. Under these circumstances most workers also reported that they grow vegetables and kept livestock (cows, pigs, goats) to top up their little salaries by selling animal-based products. In addition, Workers face high vulnerability due to lack of insurance in case of sickness, health problems or disabilities and rising food prices in the region. Further, they do not count with land titles.

Despite a low share of tea that is actually sold under FT terms (only 4 % of the tea plantation's total sales) and thus limited financial additions provided by the FT premium, in-kind transfers and infrastructure development financed by the premium were and are still valued as alternative means for (individual) economic improvement. Yet, besides the provision of LPG cooking gas, there has been little FT premium financed investment in infrastructure and other development services on the tea plantation visited over the past years.

In the **social dimension**, workers are well represented by different unions who also hold affiliations to the main political parties in the region. During meetings every three months, workers share their grievances or complaints with the union representatives who then take the issues forward to the management. Relations between unions, workers and the management appear to be constructive and based on mutual respect.

Even though women represent the majority of workers at the tea gardens, they are much less likely to be awarded a promotion. The research team found no evidence that the management of the two farms were actively supporting or promoting women in their workplace and the anti-sexual harassment committee appears to be inactive. However, the regional FT network NAPP undertakes some measures to empower female tea garden workers and introduces gender issues to the management of the tea gardens. While FT may not yet have a direct impact on the working conditions of female workers, it does affect the gender relations as more women learn to organize themselves in the FT Premium Committees and express their demands in a collective manner.

<sup>7</sup> In the past, the tea gardens also hired seasonal labor during the harvests, however, due to the shortage of labor supply, as a direct consequence of the unfavorable employment terms and increasing job and education opportunities, seasonal labor has stopped.

<sup>8</sup> For instance, workers get 60 INR per year for the tea picker basket but it costs 250 INR at present; they get 80 INR per year for shoes but the gumboots that they wear while working cost around 250 INR. They also get another 480 INR for cooking fuel expenses per year but they need to refill one cylinder for 1,100 INR per month.

Workers state that the participation processes have been improving over the years and that they are familiar with the functioning of the FPC and the premium. This is especially remarkable against the background that workers live in a very paternalistic system and often depend on the benevolence of the tea garden management. FT thus has an impact by gradually changing power relations which have existed for more than a century. As however the working conditions are not highly esteemed, especially by young males in the region, young people prefer job opportunities outside of the tea garden or migrate to other regions or countries. The risks of a loss of workforce in the tea estates is high and labor shortage is already an issue.

As the tea gardens examined in this study has also adopted organic farming and is certified against several organic standards, positive changes regarding the **environmental dimension**, such as increase in biodiversity, were primarily driven by requirements under the organic certification. For instance, the organic FT farm undertakes certain measures to reduce the risk of soil erosion including frequent irrigation during the dry season. Tree planting and reforestation are continuing processes and attention at the estates is drawn through signs on the protection of biodiversity and wildlife. Tea workers reported that the biodiversity of the estate increased after the conversion to organic farming, resulting in the return of a greater number of birds and wildlife. This is also related to the fact that they have ceased to collect firewood from the forests due to the use of LPG gas for cooking.

#### 4. Six Case Studies, Five Years Later: A Comparative Perspective

The previous remarks have illustrated how and to which extent the presence of Fairtrade has positively affected small producers and the economic, social and environmental conditions in their different rural areas. Against the background of rather heterogeneous production settings and diverse priorities of the local producer organizations, strongest effects could sometimes be identified more in economic, sometimes more in social and sometimes more in ecologic matters. While qualitative accounts like the aforementioned provide valuable insights into the living conditions of small producers and help to understand the specific pathways of change, local challenges and anticipations, quantitative figures can complement these findings in a meaningful way. In particular, they can facilitate a comparative perspective on changes across cases and across time. Therefore, the findings of the quantitative perception ratings that were realized with small producers in all case studies are supplemented in the following.

In the seed assessment exercise, the quantitative participatory rating, farmers /workers were asked to give ratings of their perception of the current and past (5 years ago) economic, social and environmental situation in their direct surroundings on a 10-point scale, whereby a rating of [10] denoted a very high satisfaction. Being aware of potential distortions and hence limited comparability of average *absolute* ratings<sup>9</sup>, the following graphs depict the average perceived *changes* over time between the FT and non-FT groups for the six case studies.

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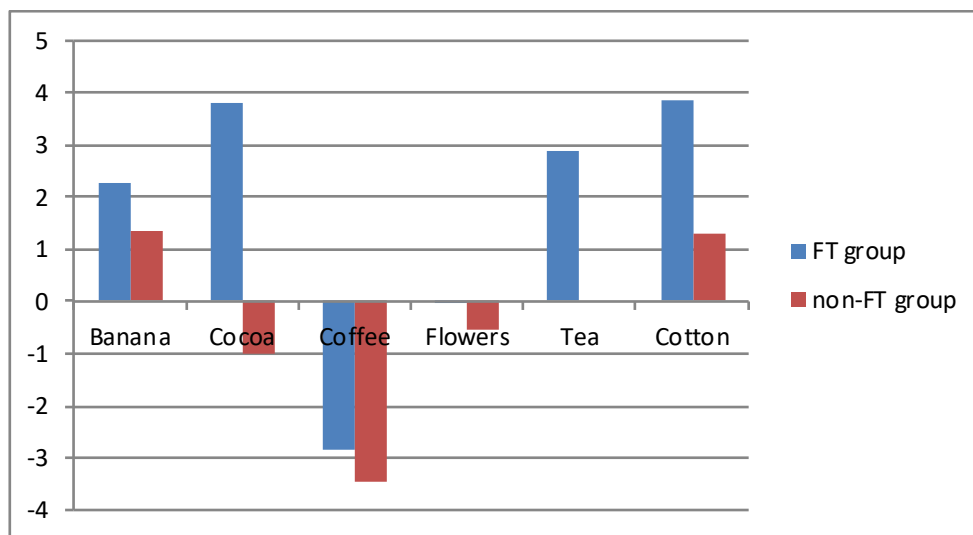
<sup>9</sup> While a rating of 7 in one case might stand for a very positive rating, it might denote a low satisfaction in a different case study, hence thwarting comparability between these two cases.



### 4.1 The Economic Dimension

The perception rating for the economic dimension underlines that FT farmers /workers generally see more favorable changes than non-FT farmers /workers – positive changes are more pronounced for FT farmers /workers and negative changes are less distinct than for non-FT farmers. FT cotton producers, for instance, saw much higher improvements in their situation today compared to five years ago and coffee farmers, who were negatively hit by the coffee crisis, saw a lower deterioration in their economic situation than their non-FT counterparts. The ratings for the banana, cocoa, tea and cotton producers display an improvement in the economic situation of FT producers. In the cotton case, for instance, this is mainly driven by increasing and higher prices for organic FT cotton and the additional provision of farm inputs through the cooperative. Worth mentioning is also the cocoa case, as FT smallholder farmers saw a considerable improvement in their economic situation, whereas non-FT farmers described a deterioration of their current situation. The exceptions from this positive picture are the coffee and – less prominent – the flowers case. In the case of coffee, the substantial decline in income following the coffee crisis and consequential indebtedness are causing concerns among both FT and non-FT farmers at the moment

Figure 4 - Perception of economic situation - Average change

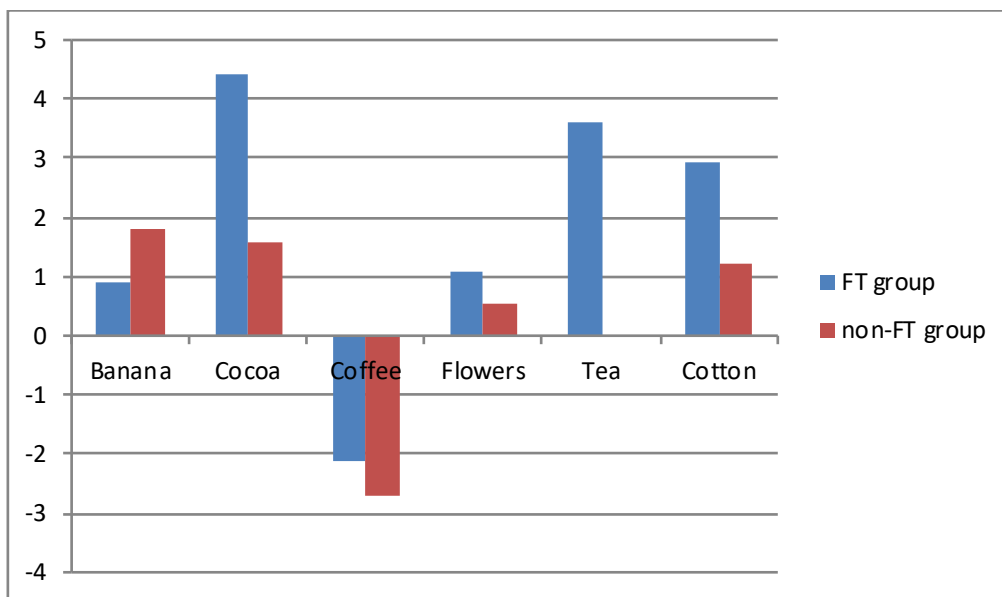


In terms of central commonalities, in all case studies the respective crop examined is still the main income source. Nevertheless, smallholder farmers and workers are to some extent engaged in alternative livelihood activities to diversify their income. Due to their time-consuming farming activities, interviewees can however only allocate very limited time to these other income sources and it has primarily the function of subsistence economy. Against this background, vulnerability of their livelihood due to natural disasters, unsatisfactory weather conditions as well as price shocks or pressure on global commodity markets is one of the most worrying issues affecting producers. This can be observed for the SPO, CPO and HL cases alike. Nevertheless, farmers and workers affiliated with FT feel much more secure than non-FT interviewees, which was mainly attributed to a guaranteed price floor/ wage, additional allowances and premiums as well as a general feeling of support by the group of likeminded farmers /workers.

## 4.2 The Social Dimension

Across all cases, the economic situations are found to strongly influence social satisfaction of the farmers/workers. Most farmers, except the coffee ones, have experienced an improvement in income levels in the last five years, which reflects on their level of satisfaction and happiness. Figure 5 underscores that in the cocoa, flower, and cotton case, FT farmers /workers show, on average, a greater positive change than the comparison group. Reasons given include, among others, that FT cocoa farmers perceived a positive recognition within the community, a feeling of prestige, due their improved capacities thanks to trainings conducted by the cooperative in the last five years. In the coffee case, both FT and non-FT groups show a deterioration of quality of life, yet also here, the FT group feels a less pronounced deterioration, speaking to the positive effects of FT in times of crisis. The banana case sets itself somewhat apart: Both the FT and non-FT group perceive an improvement in their social situation, with the greater increase however among the non-FT farmers. Still, FT banana farmers mentioned that they perceive happiness due to the obtained stability and security as well as improved opportunities for both for their children and for themselves. It becomes clear by the results of the comparison groups that there are of course also external factors contributing to an improved perception of social conditions.

Figure 5 - Perception of social situation - Average change

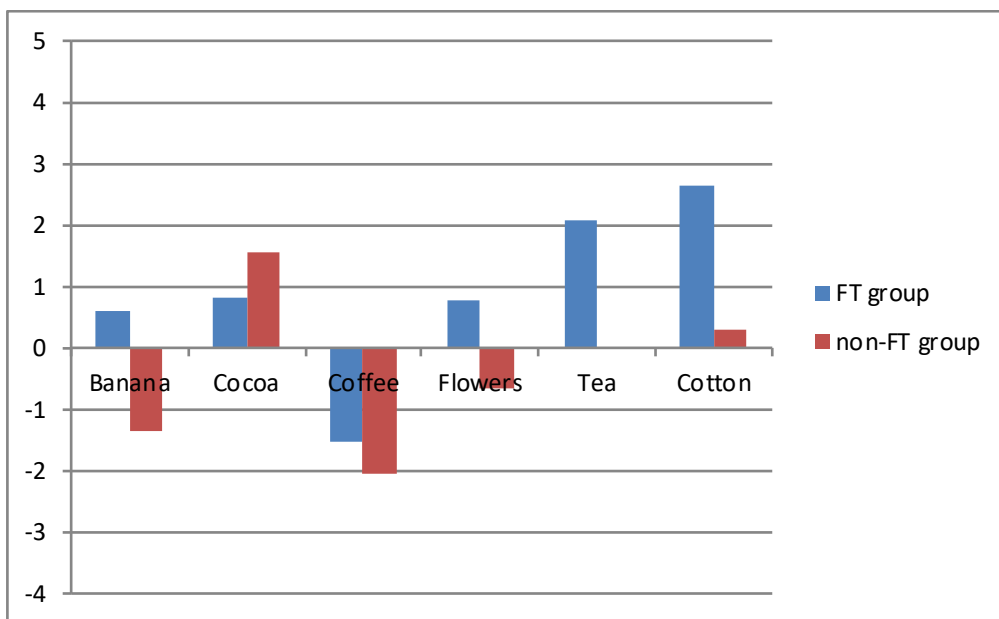


One commonality shared by especially the SPO cases relates to the participation of the next generation of farmers in agricultural activity. In the light of at present rather unappealing working conditions, children of current farmers aim at leaving agriculture behind and seek for higher education and jobs in the cities. This can have serious consequences for sustainable development of villages and entire farming sectors. Nevertheless, the majority of FT banana, coffee and cocoa farmers as well as tea and flower workers support their children to finish secondary schooling, and in some cases, access higher education or vocational trainings. Across all cases the FT premium is, partially, used to support education and farmer training initiatives in the respective communities. FT farmers /workers hence receive more frequent, diverse and intense trainings than the comparison group.

### 4.3 The Environmental Dimension

In the environmental dimension the rating exercise underlines that FT farmers /workers generally see improvements in the environmental situation – yet to different extent. Only the coffee case poses an exception here, which is primarily driven by the coffee rust plague and consequent destruction of entire farms. The banana and flowers cases also have to be highlighted since non-FT farmers /workers rather saw a deterioration in the ecologic dimension during the same time, indicating the effectiveness of FT POs’ investment in environmental affairs, such as trainings on plagues, prohibition of waste burning and introduction of composting. Furthermore, the cocoa case is characterized by a greater positive change among the non-FT group. Here, a substantial gender difference in the ecologic rating could be observed: while especially male FT cocoa farmers were rather pessimistic in terms of environmental developments, female FT and non-FT farmers saw much more positive developments. Finally, it is worth mentioning that FT cotton farmers saw a comparatively much greater improvement in the environmental situation than non-FT cotton farmers. This has to be interpreted against the background of the FT farm being certified organic from the beginning and even before FT certification, while the comparison group relies on GMO cotton.

Figure 6 - Perception of environmental situation - Average change



In terms of central commonalities, findings indicate that climate change takes its toll across different regions where farmers /workers subject to this study are settled. Apparently, rain patterns are changing: plagues are on their rise in Peru, and droughts appear more often in Ghana, Kenya and India. Changes in climate patterns have direct consequences on different environmental aspects. Water scarcity is a cause of concern in the context of cotton, flowers, cocoa and banana, making communities in the specific regions extremely vulnerable towards changes in climate patterns. FT POs try to deal differently with this external threat.

## 5. Fairtrade's Contribution to Change: A Conclusion in 2018

To conclude the findings of the study, recourse should be made to FT's ToC, which – together with the COSA set of indicators – served as the theoretical backbone of this study. To which extent does Fairtrade contribute to said impact areas? What is its impact on poverty reduction through rural development? Despite considerable variations between the six case studies the following central tendencies can be acknowledged.<sup>10</sup>

On the basis of the above findings and insights from the comparative analysis it is hence concluded that FT contributes to a great extent towards the impact area “Increased dignity, confidence, control & choice”. Farmers' /workers' active participation in democratic decision making through various FT induced committees as well as transparent processes have to be mentioned as central arguments under this impact area. Acknowledging the influence of (national) framework conditions and other actors, a moderate contribution of FT is seen in the impact areas “Improved household income, assets & standard of living”, “Increased environmental sustainability & resilience to climate change” and “Enhanced influence & status of small producers”. Here, central aspects contributing are stable floor prices and further allowances, like in the cotton case, enhanced environmental awareness through trainings, as in the banana case, as well as influence on PO decision-making, as in the flower case. Furthermore, indications for FT's contribution to some extent is deducted for the impact areas “Less risk & vulnerability, increased food security”, “Improved access to basic services” and “Increased cooperation & gender equality within communities”. Central factors restraining FT's impact in this context are unforeseen events such as natural disasters or ruptures in world commodity markets, as could be observed in the coffee case, large geographical extensions, as is seen in the cocoa case, and persisting traditional gender roles, as in the tea case study. Lastly, only a small contribution of FT on the impact area “Inter-generational sustainability of rural communities” can be concluded, as only limited attractive job opportunities are created for the next generation of farmers, as was voiced in particular in the SPO cases.

Against this background the following conclusion is drawn: By means of FT certification a positive impact for producers can be brought about in the economic, social and environmental dimension. The extent to which positive changes can be realized yet depend to a large extent on the regional and cultural settings as well as the institutional strength and organizational form of the respective FT PO. Facilitated primarily by the FT premium, positive changes for the development of producers' surroundings are still found on a limited scale but attempts to achieve more impactful investments are made by some FT actors.

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<sup>10</sup> Please also refer to the Annex of this document for a more differentiated assessment on a case-by-case basis. It should be noted again that these assessments have to be treated with care as they are by no means representative for entire product categories and settings.

## 6. Recommendations: Directed to Different Stakeholders

Lastly, on the basis of the above conclusions specific recommendations are shared and directed to FLO International/ TransFair e.V., FT regional networks, SPOs, CPOs and HL POs.

*Directed to FLO International e.V. / TransFair e.V*

**R1: Raise investments for climate change mitigation.** Natural disasters in the banana case, changing climate patterns and new plagues for coffee producers and water scarcity across the Indian and African case studies – thorough evidence could be found that climate change is already impacting marginalized producers. As FT alone will not be able to secure sufficient financial resources, different actors with an interest in continuously sourcing resources from the Global South (e.g. importers, retailers or other related companies) should, therefore, expand their responsibility across the whole supply chain.

**R2: Facilitate (supply chain) stakeholder support in times of crisis.** The study revealed that unforeseen developments, be it political turmoil, natural disasters or an aggressive plague, can trigger a profound crisis for producers / workers. Fairtrade attempts to support their POs in times of emergency but should vehemently mobilize and sensitize their vast network of supporters of private companies, NGOs and multi-lateral organizations to join these efforts.

**R3: Improve resilience of small-scale farmers and workers.** Besides emergency support, as elaborated in R2, it is equally important to enhance long-term resilience of producers and workers. Serious efforts should go into finding solutions for affordable, effective and sustainable agricultural insurance and pension systems, which further enhance farmers' trust and willingness to engage in agricultural activities and make them feel proud and self-confident towards their profession.

**R4: Examine sustainability of capacity building measures financed by the premium.** As per current standards, the cooperatives count with freedom in terms of premium investments<sup>11</sup>. Yet, the study showed that there might be incidences, where the FT premium was not always invested in the most sustainable and impactful way. It is, hence, recommended that POs are better guided in their premium investments to facilitate institutional learning and growth.

**R5: Investigate the occurrence of so-called 'ghost-cooperatives'.** In both the coffee and cocoa case, it could be revealed that cooperatives initiated by companies emerged but did not actually count any members or decision-making power structures as per FT regulation. Often members of regional networks are aware of these occurrences and more direct exchange and solution-finding should be fostered to counter fight such negative developments in the regions.

**R6: Continue to work on strategies to increase sales under FT.** This study found that the impact of FT on small-scale farms and cooperatives is still limited, due to low shares of FT on total sales. Achieving an increased market penetration should, thus, continue to be of utmost importance for Fairtrade.

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<sup>11</sup> At the moment, FT discusses in their current SPO standard review if guidelines on premium investments shall be tightened.

*Directed to FT regional networks (Fairtrade Africa, NAPP, CLAC)*

**R7: Improve capacities in social program design to move from output to outcome.** Several case studies have shown that SPO/CPO/HL management, or their project staff for social affairs, requires better capacities in result-based social program design to move beyond mere infrastructure projects or one-time trainings. It is recommended to invest in more complex partnership-based programs, flanked by technical assistance and specific capacity building.

**R8: Create a space for knowledge sharing among FT POs.** Going along with R5, several POs mentioned that there is a need of learning and knowledge exchange among them. Best practices on FT premium investment could be shared more frequently and both online and offline settings could be created to facilitate these processes.

*Directed to SPO /CPOs*

**R9: Improve scale-up strategies of cooperatives.** Distance is a crucial factor in price-building as well retrieving benefits from the FT SPO. In the case of coffee, a very centralized strategy has been followed while scaling with the main processing plants and other equipment being centered in the city or one bigger village. The Ghanaian cocoa cooperative subject to this study can be considered as best practice, as well-functioning extension offices cater to 100,000 FT cooperative members.

**R10: Promote income diversification.** Diversification is to some extent difficult for SPO management, as they sometimes struggle to assure that members hand in enough of their produce to fulfill trading contracts. Nevertheless, it is indispensable to ensure “living income”, an acceptable quality of life level, and in some cases even survival of their farmers. POs should promote diversification of their members to ensure that they continue their farming activities even in times of crisis, instead of migrating to cities.

**R11: Create attractive opportunities for the next generation of farmers.** This study revealed that in most SPO settings, children of current members aim at leaving agriculture behind and seek for higher education and jobs in the cities. That’s why new opportunities for youth must be identified to improve the image of agricultural practice and find areas of work that match with their interests and talents. It is recommended to conduct more research on aspirations and perception of the younger generation of farmer to cater to their needs in the future.

**R 12: Explore opportunities to help farmers invest in the modernization of their farms.** The study showed that especially for self-employed smallholder farmers, the acquisition of funds for necessary investments into their farms poses a huge challenge – especially for female farmers. SPOs /CPOs may either assist in the actual acquisition of funds (e.g. by setting up credit schemes) or explore alternative ways that support farmers in the modernization of their farms (e.g. by providing seeds or other farm inputs), and flank this by simultaneous measures towards financial literacy.

*Directed to HL POs*

**R13: Take action on the call for living wages.** FT has obliged their POs to move towards *living wages*. Still, the case studies illustrated that wages paid on the flower and tea farms are not perceived to be sufficient to enable sustainable livelihoods and are currently below the recommended Global Living Wage. Hence, FI and its HL POs should examine if and to what extent the current situation is still in line with the FT approach and its principles and take actions accordingly.

## 7. Literature

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## 8. Annex








The overall grading system applied differentiates between the following six categories. Table 1 describes the rating system:

Table 1 - Rating system applied






















Color Code	Descriptive Rating
	Not at all
	To a small extent
	To some extent
	To a moderate extent
	To a great extent
	To a very great extent




















In the following, ratings are given for the eight different impact areas recognized in the ToC. Ratings for each case are consolidated and one aggregated rating is given for each impact area. At this point it should be noted again that ratings have to be treated with care as they are by no means representative for entire product categories and settings but rather indicate tendencies that are hugely inspired by the specific case studies and the central findings presented before. This being said, they nevertheless provide a summarizing perspective on FT's contribution towards aspired impacts in the case study settings. The following Table 2 depicts the case study ratings, supported by one main argument, and an aggregated rating for each impact area.


Table 2 - Overall Assessment of FT's contribution towards ToC impact areas

<b>Impact 1</b>	<b>Improved household income, assets &amp; standard of living</b>		
	Banana	✓ FT contributes to a very great extent by ensuring income security to its farmers.	
	Cocoa	✓ FT contributes to a great extent by enabling their farmers to achieve higher yields.	
	Coffee	✓ FT contributes to a small extent via the minimum price, but living income, currently, is not assured.	
	Cotton	✓ FT contributes to a great extent, above all, through provision of inputs that increase available income.	
	Flowers	✓ FT contributes to a moderate extent through allowances, but wages remain low.	
	Tea	✓ FT does not contribute at all, as wages do not cover basic needs sufficiently.	



Impact 2	<b>Less risk &amp; vulnerability, increased food security</b>		
	Banana	✓ FT contributes to a great extent, as premium serves as parachute during natural disasters.	
	Cocoa	✓ FT contributes to some extent by providing income diversification training.	
	Coffee	✓ FT contributes to a small extent, by providing some support in times of crisis.	
	Cotton	✓ FT contributes to a small extent, by setting up direct contracts with producers.	
	Flowers	✓ FT contributes to a great extent, as it provides stable working condition and income to workers.	
	Tea	✓ FT does not contribute at all, as farmers cannot afford healthy food, are not able to save nor have land titles.	
Impact 3	<b>Improved access to basic services</b>		
	Banana	✓ FT contributes to a great extent by strengthening villages and initiating partnerships with municipality.	
	Cocoa	✓ FT contributes to a small extent as infrastructure developments have to be shared among more than 100,000 farmers.	
	Coffee	✓ FT contributes to a small extent, but only in their main village while remote farmers remain without support.	
	Cotton	✓ FT contributes to some extent in respect to drinking water and irrigation.	
	Flowers	✓ FT contributes to a great extent through substantial investments in education and health.	
	Tea	✓ FT contributes to some extent, by providing housing and basic services, yet they are of low-level quality.	
Impact 4	<b>Increased environmental sustainability &amp; resilience to climate change</b>		
	Banana	✓ FT (at strong SPOs) contributes to a moderate extent by investing in training on environmental measures.	
	Cocoa	✓ FT contributes to a moderate extent by providing farmers with understandable training on sustainable agriculture.	
	Coffee	✓ FT contributes to a moderate extent by implementing measures in favor of the environment.	
	Cotton	✓ FT contributes to a moderate extent by investing in organic practices and water management.	
	Flowers	✓ FT contributes to a great extent by enhancing the enforcement of existing national environmental regulations	
	Tea	✓ FT does not contribute at all, as no evidence was found in this regard.	

<b>Impact 5</b>	<b>Inter-generational sustainability of rural communities</b>		
	Banana	✓ FT contributes to a small extent, by providing new job opportunities within the cooperatives.	
	Cocoa	✓ FT does not contribute at all, as children turn away from cocoa farming due to lack of attractive livelihood prospects.	
	Coffee	✓ FT does not contribute at all, as children turn away from coffee due to lack of "living income".	
	Cotton	✓ FT contributes to a moderate extent by providing comparatively favorable income generation conditions.	
	Flowers	Does not apply to the HL setting	/
	Tea	Does not apply to the HL setting	/
<b>Impact 6</b>	<b>Increased cooperation &amp; gender equality within communities</b>		
	Banana	✓ FT contributes to a moderate extent through gender-specific trainings.	
	Cocoa	✓ FT contributes to a great extent by actively promoting women in leadership positions and providing skills trainings for women.	
	Coffee	✓ FT contributes to a small extent, but main women-related activities have stopped in the last five years.	
	Cotton	✓ FT contributes not at all, as often men are members of the CPO, attend training and take decisions.	
	Flowers	✓ FT contributes to a moderate extent, as a gender committee has been set up, but the majority of supervisors remain to be male.	
	Tea	✓ FT contributes to a moderate extent, enabling participation of both sexes in the FPC, but women often seem to be unheard.	
<b>Impact 7</b>	<b>Increased dignity, confidence, control &amp; choice</b>		
	Banana	✓ FT contributes to a very great extent, making farmers participate in with pride and "owe" their cooperative.	
	Cocoa	✓ FT contributes to a very great extent by providing a forum for engagement and involving farmers in central decision making.	
	Coffee	✓ FT contributes to some extent, as despite the crisis, the majority of farmers remain loyal to their cooperative.	
	Cotton	✓ FT contributes to moderate extent, as male farmers expressed greater understanding of their rights vis-à-vis the CPO.	
	Flowers	✓ FT contributes to a very great extent, as workers appeared to be proud of their work, considering it among the best of the region.	
	Tea	✓ FT contributes to a small extent by gradually changing power relations.	

<b>Impact 8</b>	<b>Enhanced influence &amp; status of small producers</b>		
	Banana	✓ FT contributes to a very great extent, making family participate in and “owe” their cooperative.	
	Cocoa	✓ FT contributes to a very great extent, as farmers are asked to share knowledge learned in trainings in their community.	
	Coffee	✓ FT contributes to a small extent, as only farmers in the main village still experience status and express pride.	
	Cotton	✓ FT contributes to a moderate extent, as farmers enjoy direct relationships.	
	Flowers	✓ FT contributes to a great extent, as farmers can actively influence decisions through a strong role of the union.	
	Tea	✓ FT does not contribute at all.	