

# *PARTNERSHIPS IN TOURISM*

*Private partnerships between Dutch and Ethiopian tour operators in the context of the COVID-19 crisis*

*An International Development Studies Master Thesis*

*By Aron Vijzelman (6359469)*

Supervisor: Dr. Maggi Leung

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**Utrecht University**

## **Abstract**

Over the past decades both development scholars and practitioners have called for more partnerships in tourism. In spite of these calls, there is a clear divide between literature focusing on tourism as a tool for development and literature focusing on cross-border private partnerships in tourism. This study aims to bridge this gap by focusing on how partnerships between Dutch outbound tour operators and Ethiopian inbound tour operators shape opportunities and constraints for Ethiopian inbound tour operators, prior to and during the current COVID-19 crisis.

For this purpose, 12 in-depth interviews have been conducted with Ethiopian and Dutch tour operators.

The concept of value chain governance has been used to study partnership flows, their aspects of movement and partnership qualities. The analysis revealed that the value chains in which these partnerships are set, show signs of relational value chains in which power is well balanced and mutual dependence exist.

Nonetheless, the findings show that this general image should be nuanced by the 'depth' of partnerships, the channelling force of institutions and, most importantly, by the exclusion of fully Ethiopian-owned tour operators from these value chains. This exclusion has been found to relate to the importance of European trade fairs and, most prominently, to the prevalence of generalisations and stereotypes leading to a lack of trust towards Ethiopian business owners.

Furthermore, regarding these partnerships and COVID-19, it has been found that building resilience prior to the crisis was closely related to these partnerships. Nonetheless, partners have become completely detached during the COVID-19 crisis. Subsequently, the adopted adaptation strategies during the COVID-19 crisis have been analysed and possible governance implications for the recovery of these value chains have been discussed.

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Upon return to the Netherlands, the obstacles related to COVID-19, forced me to change the topic of this thesis. This marked the start of a strange year in which progress was not always easily made. I am aware that, during these months, I have not been the easiest student to mentor. Therefore, I want to thank Dr. Maggi Leung, my supervisor throughout the entire process, for her patience and feedback that have helped me to bring this process to a good end.

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## List of abbreviations

AfT	Aid for Trade
ANVR	Algemene Nederlandse Vereniging van Reisondernemingen (Dutch Association of Travel Agents and Tour Operators)
CBI	Centrum tot Bevordering van de Import uit ontwikkelingslanden (Centre for the Promotion of Imports from developing countries)
DTISs	Diagnostic Trade Integration Studies
EIF	Enhanced Integrated Framework
FAM-trip	familiarisation trip
FITs	free independent travellers
GVC	global value chain
ITOs	incoming/inbound tour operators
LDCs	Least Developed Countries
OTOs	outbound tour operators
MoCT	Ministry of Culture and Tourism (ETH)
MoFA	Ministry of Foreign Affairs (NLD)
NOW	Tijdelijke Noodmaatregel Overbrugging voor Werkgelegenheid (Temporary Emergency Bridging Measure for Sustained Employment)
SDGs	Sustainable Development Goals
STMP	Sustainable Tourism Master Plan 2015-2025 (ETH)
TGVC	tourism global value chain
VvKR	Vereniging van Kleinschalige Reisorganisaties (Dutch Association for small scale travel organisations)

# 1. Introduction

## 1.1 Problem statement

In 2018 the international tourism sector has been growing for the ninth consecutive year, both in terms of tourism spending as well as in terms of tourist arrivals (UNWTO, 2019). Prior to the COVID-19 crisis, the sector has been growing at a higher rate than the world economy, and it has been argued that the sector is a true driver of economic growth, for countries of the global North as well as for countries of the global South (Medina-Muñoz et al., 2016; UNWTO, 2019). As a result many governments of countries in the global South actively push for tourism development (Medina-Muñoz et al., 2016). One of the countries that has been doing so, is Ethiopia. Since 2001 the tourism sector in Ethiopia has been steadily growing due to the continued efforts of the country's governments to promote tourism (Ali, 2016). In 2015 the Ministry of Culture and Tourism (MoCT) published the 'Sustainable Tourism Master Plan 2015-2025' (STMP), in which the Ministry states its vision that "Ethiopia will become one of the top 5 tourist destinations in Africa by 2025" (MoCT, 2015, p. 100). In order to achieve these ambitious goals and, thus, to attract more tourists, it has been suggested that Ethiopian inbound tour operators would benefit from partnering with European outbound tour operators (Altes, 2018). These cross-border private partnerships are rather common in tourism as it allows both parties to complement each other. Actors in the sending location often possess valuable market information, whereas actors in receiving locations usually maintain close relationships with local (service) suppliers (Mwesiumo & Halpern, 2018).

However, even though partnership is obviously an appealing concept, one should be careful not to mindlessly applaud all partnerships. Currently, little is known about the characteristics of partnerships between tour operators from the global North and the global South. Furthermore, little is known about the impact of these partnerships on tourism development in the global South. Additionally, the recent outbreak of the COVID-19 pandemic, with profound consequences for tourism, exposes previously unseen dynamics in the tourism industry.

Therefore, this thesis aims to explore the dynamics of these cross-border private partnerships, focusing specifically on partnerships between Dutch outbound and Ethiopian inbound operators. Moreover, the impact of a sudden external shock, i.e., the COVID-19 pandemic, on these partnerships will be assessed.

The remainder of this section will be devoted to positioning tourism and cross-border private partnerships in tourism within the broader development context. Lastly, the main knowledge gaps within tourism partnership literature will be stated and the research questions will be presented.



## **1.2 Tourism and partnerships in the context of development**

It is perhaps needless to note that perspectives on the relation between tourism and development have been subject to many changes. Several scholars point out that perspectives on tourism have evolved along the lines of the major development paradigms (Holden, 2013; Telfer & Sharpley, 2016). Telfer (2015) states that the most recent development paradigm of which the influence on tourism research is clearly noticeable, is the human development paradigm of the 1990s and 2000s. This has resulted in a focus on areas such as pro-poor tourism and responsible tourism (Telfer, 2015). More specifically, scholarly works have centred around the potential of tourism to eradicate poverty, especially since the introduction of the Millennium Development Goals (Medina-Muñoz, Medina-Muñoz, & Gutiérrez-Pérez, 2016).

In spite of initial optimism, there are many doubts about the relation between tourism and poverty alleviation. Most importantly, there is little statistical evidence that tourism actually eradicates poverty (Medina-Muñoz et al., 2016).

Despite these recent doubts among scholars, practitioners, especially implementers of the Aid for Trade (AfT) agenda, seem very committed to promoting tourism as a tool for development (Lacey & Ilcan, 2015). Illustratively, the Enhanced Integrated Framework (EIF), the only global AfT programme exclusively designed for the Least Developed Countries (LDCs), focuses on funding so-called Diagnostic Trade Integration Studies (DTISs), that serve as a compass for future interventions by the EIF and other development partners (EIF & UNWTO, 2015; UNWTO, ITC & EIF, 2017). In 2017, 45 out of the 48 LDCs with a completed DTIS have identified tourism as a key sector in their DTIS (UNWTO et al., 2017).

One of the ways in which the AfT implementers are aiming to promote tourism for development, is by emphasising the need for partnerships (EIF & UNWTO, 2015; WTO, 2019). Within the wider field of international development, the need for partnerships has also been captured in the Sustainable Development Goals (SDGs) (SDG 17, see United Nations, n.d.).

The AfT initiative, however, is subject to a substantial amount of criticism. It has been argued that this new aid regime is merely directed towards stimulating private sector accumulation (Murray & Overton, 2016). Nonetheless, several scholars who have been working on tourism as a tool for development have also emphasised the need for partnerships (e.g., Holden, 2013; Novelli, 2015). However, scholars have also claimed that, within the tourism sector, partnerships are often a continuance of relations and practices established during colonial rule and result in constraints on the sovereignty of the non-dominant partner (Lacey & Ilcan, 2015). Therefore, it has been argued that for tourism to actually contribute to development, all stakeholders are required to collectively adopt an approach that is specifically targeted towards development (Holden, 2013).

### 1.3 Knowledge gaps and outline

The literature review has exposed several gaps or shortcomings of the current debate.

Both implementers of the Aft agenda, as well as scholars who have written about tourism as a tool for development, have pointed to the importance of partnerships (e.g., EIF & UNWTO, 2015; Holden, 2013; Novelli, 2015; WTO, 2019). However, in doing so, they have paid little to no attention to existing cross-border private partnerships in tourism.

It is safe to say that, for a long time, there has been an incredibly underwhelming amount of attention for private partnerships within tourism literature (Song, Liu & Chen, 2013; Yodsuwan & Butcher, 2012). In cases where private partnerships in tourism have been discussed, up until recently, scholars have solely done so by focusing on partnerships in the destination, entirely ignoring the transnational link (Song et al., 2013). Furthermore, the few studies that did focus on cross-border private partnerships, have almost exclusively adopted a business perspective, completely overlooking the tourism-development debate (e.g., Barham, Dörry & Schamp, 2007; Chand & Katou, 2012; Christian, Fernandez-Stark, Ahmed, Gereffi, 2011; Gjerald & Lyngstad, 2015; Mwesiumo, Halpern & Buvik, 2019; Mwesiumo & Halpern, 2018).

This clearly points out that there is a divide between literature focusing on tourism as a tool for development and literature focusing on cross-border private partnerships in tourism. If the use of tourism as a tool for development is to be fully explored, it is essential to link these debates.

Therefore, this study attempts to start building a bridge between these two areas by focusing on answering the following main research question:

*How do partnerships between Dutch outbound tour operators and Ethiopian inbound tour operators shape opportunities and constraints for Ethiopian inbound tour operators, prior to and during the COVID-19 crisis?*

The following section presents a thorough review of relevant literature, leading to the construction of a conceptual model and the formulation of sub research questions, which will help in answering this main question. Thereafter, the regional thematic framework explores the topic in the context of the Netherlands and Ethiopia. Subsequently, the methodology of this study will be presented and critically reflected upon. Lastly, the findings of this study will be presented in three thematic chapters followed by a discussion and conclusion.

## 2. Theoretical Framework

Firstly, this section discusses scholarly debates regarding the tourism global value chain and cross-border partnerships between outbound and inbound tour operators. The previously identified knowledge gaps follow directly from this analysis.

Thereafter, the main concepts that can contribute to filling these knowledge gaps will be presented in a conceptual model. Lastly, the research questions will be stated.

### 2.1 Literature review

#### 2.1.1 *The tourism global value chain*

Before proceeding to an in-depth literature analysis on private cross-border partnerships between outbound and inbound tour operators, it is essential to familiarise ourselves with the tourism value chain.

The concept of a value chain first emerged in the work of Porter in 1985 (Song et al., 2013). Porter used this concept to study the different activities a firm undertakes in order to trace sources of competitive advantage within that firm (Romero & Tejada, 2011). However, the concept of the value chain has subsequently been applied to study entire industries. In these cases, the concept is referred to as the macro value chain (e.g. Song et al., 2013) or the global value chain (GVC) (e.g., Gereffi, 2014; Romero & Tejada, 2011), which has been derived from and mainly used for the analysis of manufacturing industries (Song et al., 2013). The GVC framework focuses on the dynamics between different actors in global industries and is claimed to be a useful tool to study links between actors who are part of the same industry but do not operate from the same location (Gereffi & Fernandez-Stark, 2016).

When it comes to tourism, visualising a tourism global value chain (TGVC) is a complex matter, since the tourism industry differs from production-based industries in many respects. Firstly, the tourism industry is not a single demarcatable industry, thus a TGVC includes businesses from many different sectors who are all part of their own chains (Clancy, 2008). Moreover, these businesses are not limited to service deliverers, but also include for example souvenir shops, which makes the tourism industry a 'cross-sector' (Tejada, Santos, & Guzmán, 2011). Furthermore, in the TGVC it is the customer who moves towards the product rather than the other way around and the product itself is consumed and produced concurrently (Clancy, 2008; Song et al., 2013). Other differences between the TGVC and production-based GVCs are the fact that the TGVC starts with distribution rather than ending with it, that policy making and planning is often highly centralised, especially in developing countries, and that there is no direct incentive for actors in the value chain to stop

overexploitation of resources since many resources are public (Christian et al., 2011; Song et al., 2013)

Despite these complexities, it is argued that the GVC framework is a useful tool for the analysis of the tourism industry, since it is one of the most internationalised sectors, which suits the GVC framework's capacity to gain insights in many productive activities, actors and linkages between them (Gereffi & Fernandez-Stark, 2016; Tejada et al., 2011). Several scholars have attempted to visualise the TGVC, ranging from rather basic visualisations (e.g. Romero & Tejada, 2011, p. 300; Song et al., 2013, p. 2) to more elaborate ones (see Figure 1).

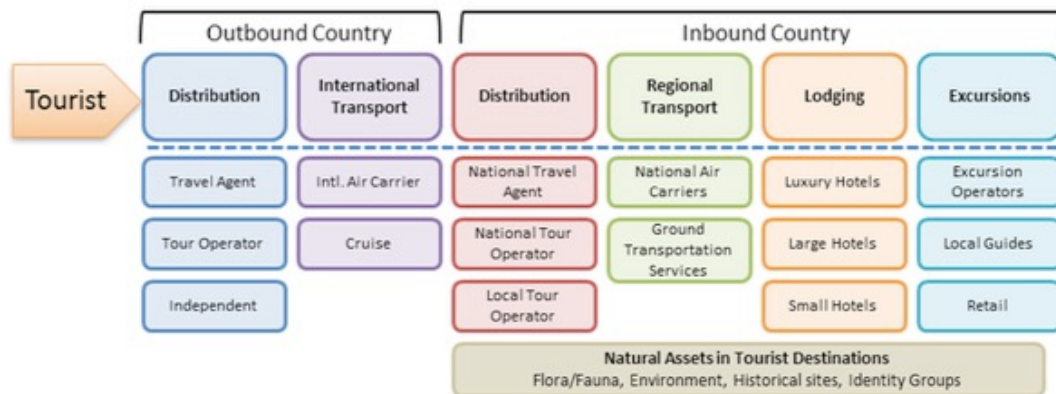


Figure 1: The tourism global value chain (source: Christian, in Christian, Fernandez-Stark, Ahmed, & Gereffi, 2011, p. 11)

In order to understand how a GVC is controlled and how flows are coordinated throughout the chain, one has to consider the concept of value chain governance. Governance is claimed to be central to GVC analysis and it focuses on how flows such as profits and risks are distributed throughout the chain and on the power of different actors within the chain to influence this process (Gereffi, 2014). Thereby, value chain governance places emphasis on the role of interfirm relationships and mechanisms as a tool for non-market coordination (Tejada et al., 2011). The governance of a GVC is a vital issue since it is claimed that effective interorganisational governance stimulates the transfer of knowledge and improves the stability of the value chain, whereas a lack of governance is claimed to lead to conflict (Song et al., 2013).

With the emergence of the concept of value chain governance it was immediately acknowledged that different types of governance exist, which led to the distinction between producer-driven and buyer-driven chains (Gereffi, in Tejada et al., 2011). However, as research on the topic of value chains became more prominent and the range of observations widened, other typologies emerged to cover this range of observations (Tejada et al., 2011). A typology that is still widely used and referred to (e.g. by Gereffi, 2014; Gereffi & Fernandez-Stark, 2016; Tejada et al., 2011) is the one offered by Gereffi, Humphrey, &

Sturgeon (2005). The typology is based on three factors, namely the complexity of information and knowledge that flows through the chain, the extent to which this information and knowledge can be codified and the capabilities and competences of (potential) suppliers (Gereffi et al., 2005; Gereffi & Fernandez-Stark, 2016). These factors have led to the typology as depicted in Figure 2.

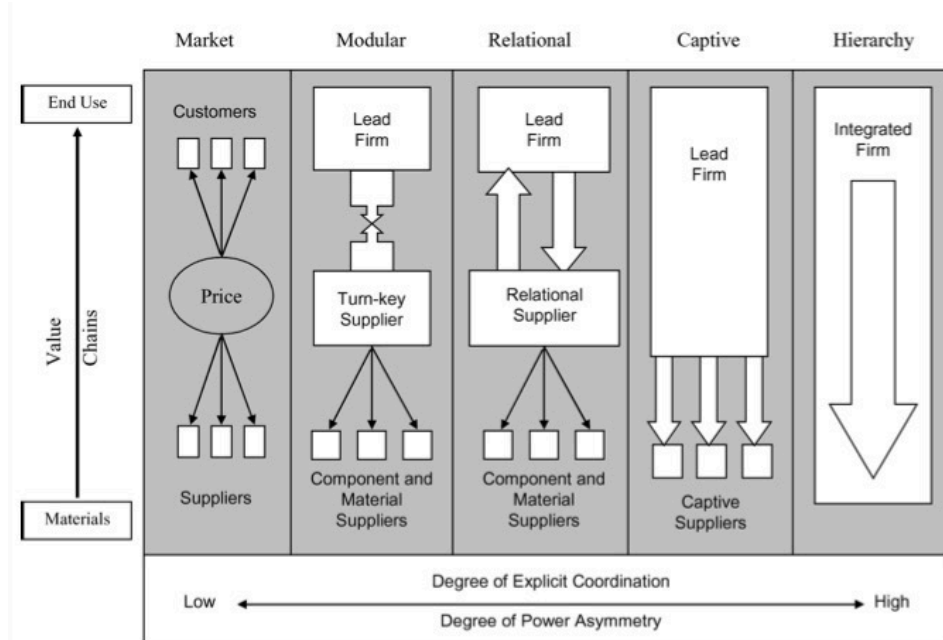


Figure 2: Typology of GVC governance (source: Gereffi et al., 2005, p. 89)

Tejada et al. (2011) have attempted to apply this typology to the tourism sector. According to the authors, the *tourism market* type applies to chains with simple transactions between buyers (e.g. tour operators) and suppliers (e.g. transport and accommodation providers) of clearly defined products. The capabilities of the suppliers are more than sufficient to fulfil the requirements of the transaction (Gereffi et al., 2005; Tejada et al., 2011).

The modular, relational and captive types are all forms of *tourism networks* (Tejada et al., 2011). The *modular* type then refers to chains where modular packages are tailored to the customer's demands (Tejada et al., 2011). Due to the capabilities of turn-key suppliers to internalise tacit information, transactions remain fast and flexible (Gereffi et al., 2005). Since the information needed for the transaction is codifiable, the costs of switching to new partners are relatively low (Gereffi et al., 2005; Tejada et al., 2011). The *relational* type describes chains that offer very specific tourism products, which means that the transactions are complex and the information is not easily codifiable (Gereffi et al., 2005; Tejada et al., 2011). The delivery of these products requires specialised and highly capable suppliers that are relatively rare (Gereffi et al., 2005). As a result, the power balance is more symmetrical and the costs of switching partners is high (Gereffi et al., 2005; Tejada et al., 2011). The *captive* type refers to chains where large tour operators (buyers) have the power coordinate most activities in the chain (Tejada et al., 2011). Smaller and relatively less capable suppliers provide

mostly simple services such as transport or accommodation, whereas the buyers coordinate additional activities and offer complex products and packages (Gereffi et al., 2005; Tejada et al., 2011). The switching costs for suppliers in this chain are especially high. Lastly, the *tourism hierarchy* concerns value chains that consist of vertical groups of tour operators, airline companies, hotels and travel agencies that are vertically integrated (Tejada et al., 2011). These groups have significant power over the global market (Tejada et al., 2011).

Even though the application of the GVC governance typology of Gereffi et al. (2005) to tourism is insightful, the specific characteristics of the industry lead to several complexities that Tejada et al. (2011) do not address. As previously stated, in the TGVC the product is consumed and produced concurrently (Clancy, 2008). In terms of governance, this means that it is impossible to value the product prior to its consumption, which makes the TGVC more vulnerable to opportunistic behaviours by actors within the chain (Song et al., 2013).

Moreover, the aforementioned centralised organisation of policy making and planning by governments in tourism destinations, especially in developing countries, implicates that a significant amount of power to influence the coordination of flows through the TGVC is allocated to actors who are not directly a part of the TGVC (Song et al., 2013). Lastly, it has been stated that in the TGVC it is the customer who moves towards the product rather than the other way around (Song et al., 2013). Therefore, tourism intermediaries, such as tour operators, that form the bridge between the customers and the product, play a vital role (Song et al., 2013). Mitchell (2012) even notes that international tour operators specifically are of crucial importance since they tend to have a significant amount of power and can therefore make demands and set standards for the other actors in the TGVC. In Figure 1, these intermediaries can be found in the columns of outbound distribution and inbound distribution.

In order to form this bridge between the customer and the product, outbound tour operators often partner with inbound tour operators or travel agencies (Barham et al., 2007; Chand & Katou, 2012; Christian et al., 2011; Mwesiumo & Halpern, 2018). Nonetheless, Tejada et al. (2011) do not distinguish between outbound and inbound operators or travel agencies, rather, they mention tour operators as a single group. Consequently, there is no opportunity to cover these partnerships within their interpretation of the typology of Gereffi et al. (2005), even though these firms, and therefore these partnerships, perform a vital role in the TGVC (Song et al., 2013).

However, Tejada et al. (2011) are not the only scholars to disregard these cross-border partnerships. Song et al. (2013) have conducted a literature review on 45 articles on tourism value chain governance published between 1988 and 2011. The authors have categorised these 45 articles under five main research themes. The themes 'destination management' and 'destination marketing' accounted for 31 of the 45 publications (Song et al., 2013). This shows that even though literature speaks of governance of global value chains, the governance of

cross-border flows within these chains receives little attention by scholars due to an excess of attention for the destination. This corresponds with the finding that only seven per cent of these articles focus on the integration of distribution channels within the tourism value chain (Song et al., 2013). It is therefore no surprise that Song et al. (2013) call for more scholarly attention on this topic.

### *2.1.2 Cross-border partnerships between outbound and inbound tour operators*

This section will zoom-in on these partnerships between inbound and outbound tour operators, starting by exploring the rationale behind these partnerships before taking a closer look at the dynamics.

Partnerships are a common phenomenon for many of the world's institutions and organisations. Within the field of sustainable development, the need for partnerships has been captured in the SDGs (SDG 17, see United Nations, n.d.). The call for partnerships in tourism by some of the implementers of the SDG agenda further suggests that there is a strong belief in the need for partnerships (EIF & UNWTO, 2015; WTO, 2019).

It is perhaps not surprising that several scholars who have been working on tourism as a tool for development have also emphasised the need for partnerships (e.g., Holden, 2013; Novelli, 2015). Holden (2013) points out that partnerships in tourism are essential if tourism is to contribute to the reduction of poverty. He states that for tourism to contribute to the reduction of poverty, all stakeholders are required to collectively adopt an approach that is specifically targeted towards the reduction of poverty, rather than a strategy targeted towards individual gains (Holden, 2013). Similarly, Novelli (2015) argues that cross-border partnerships are needed to maximise the development benefits of tourism.

Partnership is obviously an appealing concept, however, one should be careful not to mindlessly applaud all partnerships. Illustratively, the concept of freedom is an appealing concept (see Harvey, 2006), however this does not mean that liberalism is automatically the best way forward. Partnerships exist in many forms and levels and Lacey & Ilcan (2015) claim that, within the tourism sector, partnerships are often a continuance of relations and practices established during colonial rule and result in constraints on the sovereignty of the non-dominant partner. Nonetheless, partnerships are prevalent within the tourism industry for several reasons. March and Wilkinson (2009) argue that private partnerships are extremely relevant in the tourism sector since the success of a certain destination depends to a great extent on the links between different actors in the tourism value chain. Similarly, it has been pointed out that the competitiveness of a specific tourism firm depends significantly on the value chain this firm is a part of (Mwesiumo et al., 2019).

In order to gain more in-depth knowledge on the dynamics of cross-border partnerships between outbound and inbound tour operators, it is

relevant to, besides identifying a general rationale behind partnerships in tourism, identify the rationale behind this specific type of partnerships.

Focusing specifically on cross-border partnerships between outbound and inbound tour operators, Mwesiumo and Halpern (2018) claim that these partnerships can create a competitive advantage for firms in both the outbound location as well as firms in the inbound location. Both parties could complement each other's knowledge as actors in the sending location often possess valuable market information, whereas actors in receiving locations usually maintain close relationships with local (service) suppliers (Mwesiumo & Halpern, 2018).

Furthermore, it has also been pointed out that cross-border partnerships between outbound and inbound tour operators leads to more effective use of resources, improved performance on both ends, technology sharing, innovation and organisational learning (Chand & Katou, 2012; March & Wilkinson, 2009). Thus, it seems that most arguments for cross-border partnerships between outbound and inbound tour operators in tourism, centre around the complementarity of the partners in such a way that the combined benefits of the partnership are larger than the sum of the individual components.

Once a cross-border private partnership is established, there are numerous factors that determine whether or not a partnership is successful and for which parties it is successful.

In their preparatory literature review on determinants of effective collaboration within a tourism context, Yodsuwan & Butcher (2012) identified several key factors that have been proposed in previous literature, namely: leadership, communication, resources and support, benefit and interest, trust, interdependency, mutual respect, commitment, power, representation and equality and sharing common goals. Even though Yodsuwan & Butcher (2012) are interested in collaboration within a tourism context, many of these factors have been found in research outside the tourism literature (Yodsuwan & Butcher, 2012). This indicates, as also concluded by Yodsuwan & Butcher (2012) themselves, that attention for partnerships by tourism scholars has been rather limited. Furthermore, it has to be noted that the aims of these researches has not been to present an exhaustive list of factors, but rather a number of factors that can best be used to predict the effectiveness of a partnership (Yodsuwan & Butcher, 2012). Several of the factors identified by Yodsuwan & Butcher (2012), have later also been emphasised by scholars focusing specifically on partnerships between outbound and inbound tour operators, some of which will be discussed now.

Mwesiumo & Halpern (2018) argue that the previously mentioned complementarity between outbound and inbound partners creates an interdependence. However, according to the authors this interdependence is often rather uneven, meaning that one of the partners is more dependent on the other. More precisely, they state that the ability of outbound operators to direct



flows of tourists often makes them more powerful than their inbound partners (Mwesiumo & Halpern, 2018). This creates an asymmetric interdependence which, according to the authors, is closely related to the lack of partner replaceability for inbound operators versus an abundance of partner replaceability for outbound operators (Mwesiumo & Halpern, 2018). As a result, they claim that inbound operators would benefit from reducing their reliance on their overseas partners (Mwesiumo & Halpern, 2018).

Furthermore, the factors benefits and equality, as mentioned by Yodsuwan & Butcher (2012), are brought together and emphasised by Mwesiumo & Halpern (2018) as distributive fairness. Mwesiumo & Halpern (2018) assume that, as the outbound operators are more powerful, they also have the power to influence distributive fairness. Subsequently, they argue that the commitment of inbound operators, and thus the quality of the partnership, can be influenced by the inbound operator's perceptions of the outbound operator's distributive fairness (Mwesiumo & Halpern, 2018).

### *2.1.3 Risks, external shocks and resilience*

Risks of various kinds are present in any GVC, including the TGVC. However, the specific characteristics of the TGVC have implications for the specific risks that the industry is prone to and for the way that risk is being managed.

As previously discussed, the competitiveness of a specific tourism firm depends significantly on the value chain this firm is a part of, which is one of the reasons that partnerships are extremely prevalent and relevant within in the tourism industry (Mwesiumo et al., 2019). However, besides creating value, partnerships also bring risk (Gjerald & Lyngstad, 2015). Scholarly works on risks in the TGVC have been focusing mostly on absolute risks and on the downstream end of the value chain, i.e., customers and outbound tour operators. Few studies have focused on risks of private tourism partnerships, however that does not mean that these partnership risks are irrelevant. In fact, literature on private partnerships in tourism has claimed that perceptions of risks of tour organisers on partnerships in the destination could influence the long-term development of tourism in a specific destination (Jensen, 2009).

In their analysis of the up- and downstream risks that incoming tour operators (ITOs) in Madagascar face, Gjerald & Lyngstad (2015) find that the upstream risk most commonly identified by the ITOs, is related to market information and expectations. This refers to the risk that outbound tour operators (OTOs) might provide misinformation to (potential) customers (Gjerald & Lyngstad, 2015). In combination with inaccurate or incomplete images painted by the media, this might lead to customers having the wrong expectations about the destination and their specific trip (Gjerald & Lyngstad, 2015). The most commonly mentioned coping mechanism for this problem, identified by Gjerald & Lyngstad (2015), is market analysis and communication, i.e., keeping close contact with overseas partners and customers. Gjerald &

Lyngstad (2015) specifically call for more research on how this coping strategy is being practiced.

Besides these partnership-related risks, the TGVC is prone to other, more absolute risks as well. This has become painfully obvious during the current COVID-19 crisis. In fact, one of the arguments against the use of tourism as a tool for development is the susceptibility of the sector to external shocks such as terrorist attacks, natural disasters and, as we have recently witnessed, pandemics (Holden, 2013). As a result, the management of these risks is essential both for individual organisations and for destinations in general, and plays a large role within the TGVC (Mair et al., 2016).

In their literature review of 64 articles focusing on crisis and disaster management in tourism, Mair et al. (2016) found that a lack communication between the destination and the market is one of the main problems in crisis and disaster management. Partnerships, they argue, could contribute to the facilitation of crisis communication. Furthermore, Mair et al. (2016) found that marketing strategies could play a large role in the recovery process of destinations. This finding is especially interesting for the topic of this thesis. As previously mentioned, within partnerships between inbound and outbound tour operators, marketing is typically an activity that is carried out by the outbound tour operator. Therefore, the recovery of a certain destination and of many inbound tour operators, partly depends on the marketing efforts of their overseas partners. It could therefore be stated that the quality of a partnership and the continuance of communication during a period of crisis (e.g., the current COVID-19 crisis) could significantly influence an inbound operator's chance of survival.

Another major issue that surfaced in the literature review by Mair et al. (2016) is the concept of resilience. Resilience is a concept that first emerged in ecology and was later applied to social-ecological systems (Cochrane, 2010). Mair et al. (2016) define resilience as "the amount of disturbance an organisation (or destination) can absorb before it changes trajectory and alters or ceases operation" (p. 15). Even though definitions of the concept differ, most scholars seem to agree that the capacity to adapt is the pivot of resilience (Cochrane, 2010; Dahles & Susilowati, 2015; Mair et al., 2016). Mair et al. (2016) further state that small- and medium-sized enterprises in tourism often lack resilience, as they are more occupied with day-to-day survival and therefore partly depend on close cooperation within the value chain for developing their resilience. However, according to the authors, more research is needed on how these firms can best be supported in building resilience.

Based on the work by Mair et al. (2016), one could state that ITOs in destinations depend on their overseas partners both prior to a crisis (for building resilience) as well directly after a crisis (for marketing purposes). One could therefore conclude that the quality of a partnership could significantly

improve an ITOs chance of survival. The importance of a network for building and maintaining resilience is confirmed by other authors (e.g. by Jiang & Ritchie, 2017). Nonetheless, the claim by Mair et al. (2016) that small and medium enterprises often lack resilience is not widely supported. It has been argued that smaller businesses are more flexible than larger organisations, which means that their adaptive capacity, the pivot of resilience, is higher (Dahles & Susilowati, 2015).

#### *2.1.4 Knowledge gaps*

The literature review has exposed several gaps or shortcomings of the current debate.

Both implementers of the AfT agenda, as well as scholars who have written about tourism as a tool for development, have pointed to the importance of partnerships (e.g., EIF & UNWTO, 2015; Holden, 2013; Novelli, 2015; WTO, 2019). However, in doing so, they have paid little to no attention to existing cross-border private partnerships in tourism.

It is safe to say that, for a long time, there has been an incredibly underwhelming amount of attention for private partnerships within tourism literature (Song, Liu & Chen, 2013; Yodsuwan & Butcher, 2012). In cases where private partnerships in tourism have been discussed, up until recently, scholars have solely done so by focusing on partnerships in the destination, entirely ignoring the transnational link (Song et al., 2013). Furthermore, the few studies that did focus on cross-border private partnerships, have almost exclusively adopted a business perspective, completely overlooking the tourism-development debate (e.g., Barham, Dörry & Schamp, 2007; Chand & Katou, 2012; Christian, Fernandez-Stark, Ahmed, Gereffi, 2011; Gjerald & Lyngstad, 2015; Mwesiumo, Halpern & Buvik, 2019; Mwesiumo & Halpern, 2018).

This clearly points out that there is a divide between literature focusing on tourism as a tool for development and literature focusing on cross-border private partnerships in tourism. If the use of tourism as a tool for development is to be fully explored, it is essential to link these debates.

## **2.2 Conceptual framework**

The field of development studies has, for a long time, mostly been focused on development in space-bound localities in the global South, often viewing the 'local' completely isolated from other localities (Zoomers & Van Westen, 2011). In today's globalised world, such a separation can hardly be justified (Zoomers & Van Westen, 2011). As explained by Zoomers & Van Westen (2011, p. 377): "local development opportunities are very much determined by what is happening in other places – sometimes directly, as a result of flows of capital, goods, people and information". The recent outbreak of the COVID-19 pandemic is in many ways perhaps one of the most striking recent examples of this dynamic. According to Zoomers & Van Westen (2011), when such flows are

repeated frequently they might materialise and/or institutionalise and form development corridors.

In many ways, the same can be concluded about literature on tourism partnerships. As identified in the previous section on knowledge gaps, literature on tourism partnerships has, until recently, mostly been centred on partnerships in the destination. This has resulted in a conceptual isolation of the tourism destination from the tourism market (Song et al., 2013). However, the prevalence of cross-border tourism partnerships (as identified by e.g. Barham et al., 2007; Chand & Katou, 2012; Christian et al., 2011; Gjerald & Lyngstad, 2015; Mwesiumo & Halpern, 2018; Mwesiumo et al., 2019) tells us that such an isolation merely exists in theory. One could state that repeated flows of tourists (and the accompanying flows of money, information etc.) along a certain route, institutionalise in value chains with formal partnerships between the actors who facilitate these flows, i.e., cross-border private partnerships between outbound and inbound tour operators. This institutionalisation will then affect both the sending and receiving location and developments that lead to advantages on one side of the corridor might lead to disadvantages on the other end.

Adopting this line of thinking, this thesis will aim to answer to the call by Zoomers & Van Westen (2011) of taking the total corridor as the unit of analysis. The tourism industry is per definition suited to be analysed from the perspective of translocality and development corridors, as the very nature of production and consumption in tourism value chains requires numerous repeated flows between different localities.

It has to be noted that, even though the entire corridor is examined, this study focuses specifically on the opportunities and constraints that the corridor generates for the Ethiopian inbound tour operators. This has been decided upon because from a development perspective, the opportunities and constraints of Ethiopian operators are more relevant than those of Dutch operators. Furthermore, as inbound tour operators are often presumed to be the less powerful one, focusing on their opportunities and constraints presumably leads to more relevant insights (Mwesiumo & Halpern, 2018).

The remainder of this section will be devoted to the construction of a conceptual model of partnerships between Dutch OTOs and Ethiopian ITOs.

### *2.2.1 The conceptual model*

Even though (Tejada et al., 2011) do not distinguish between inbound and outbound tour operators, it can be argued that, based on their typology of TGVC governance, the OTOs act as buyers whereas the ITOs act as suppliers. As can be derived from the typology by Gereffi et al. (2005) (see Figure 2 on p. 6), these buyer-supplier relationships are at the core of GVC governance, and thus, partnerships between OTOs and ITOs can be considered vital in studying tourism value chain governance (Mitchell, 2012; Song et al., 2013).

Value chain governance is concerned with how flows are coordinated

throughout the chain and with the power of different actors within the chain to influence this process (Gereffi, 2014). Using the concept of GVC governance to study partnerships between OTOs and ITOs therefore places emphasis on the power dynamics of these partnerships.

Consequently, value chain governance has been conceptualised and depicted in the conceptual model (see Figure 3 on p. 16) as a force that guides the flows and partnership qualities. Several sidenotes are to be made regarding the conceptualisation of value chain governance.

Firstly, the conceptualisation of value chain governance as a guiding force does not mean that it is viewed as a static concept. The type of governance is exposed by the partnership flows and the partnership qualities. Changes in these aspects, which can occur at any given time, signal changes in the power dynamics within the partnership which could impact value chain governance.

Secondly, even though the concept of value chain governance concerns the complete value chain, this study only focuses on the implications of partnerships between OTOs and ITOs for value chain governance. This has been decided upon since, as previously stated, OTOs and ITOs can be considered vital in studying tourism value chain governance (Mitchell, 2012; Song et al., 2013). The conceptual model does acknowledge the implications further up and down the chain, through the arrows flowing through the OTO and ITO and the source market and destination country respectively (see Figure 3).

The next step to completion of the conceptual framework is to zoom in on partnerships within the context of value chain governance. Literature on tourism value chains and partnerships in tourism has emphasised several aspects of partnerships in the TGVC to be of major importance, i.e., *people* (Christian et al., 2011; Song et al., 2013), *profit* (Gereffi, 2014; Mwesiumo et al., 2019), *risk management* (Gereffi, 2014; Gjerald & Lyngstad, 2015; Jensen, 2009; Mwesiumo et al., 2019), *knowledge* (Gereffi, 2014; Gjerald & Lyngstad, 2015; Jensen, 2009; March & Wilkinson, 2009; Mwesiumo et al., 2019; Song et al., 2013), *ideas* (Jensen, 2009; March & Wilkinson, 2009), *information* (Mwesiumo et al., 2019; Song et al., 2013), *trust* (Jensen, 2009; Song et al., 2013; Yodsuwan & Butcher, 2012) and *interdependence* (Mwesiumo & Halpern, 2018; Yodsuwan & Butcher, 2012).

Some of these factors, such as profit, knowledge and ideas, are considered to be actual flows, flowing from partner to partner through the value chain. For other aspects, such as, trust, risk management and interdependence, conceptualising them as flows is less straightforward

When it comes to the factors that can easily be conceptualised as flows, it is key to analyse them in such a way that information can be extracted from them. Doing this will lead them to expose more than merely the mobility of something

or someone. In this regard, the body of research on the politics of mobility offers valuable insights.

As outlined by Zoomers & Van Westen (2011) studying translocality and development corridors is inextricably linked with mobility and flows of various nature. The incorporation of flows other than flows of people in the study of mobility had already been promoted within the 'new mobilities paradigm' (Sheller & Urry, 2006). These authors argued that scholars should be focused on how the movement of people growingly overlaps with other flows such as flows of material, information and money (Sheller & Urry, 2006). Furthermore, Sheller & Urry (2006) note that mobility and power are highly connected. Mobility is a resource that not everyone has equal access to, and mobility and control over mobility reflect this inequality (Sheller & Urry, 2006). Following this logic, Cresswell (2010) shows how mobility itself is an extremely political concept. He argues that there are social relations underlying the concept of mobility and that these relations involve the production and distribution of power (Cresswell, 2010). In an attempt to illustrate this, Cresswell (2010) emphasises six aspects of movement (i.e., flows) that bring the political aspects to the fore. These aspects are motive force, speed, rhythm, route, experience and friction.

If this logic is applied to the TGVC, one could state that the relations underlying a partnership largely determine which flows exist and, perhaps more importantly, how they flow. In other words, the social relations and power dynamics underlying a partnership between an OTO and an ITO will expose how the partnership and, more broadly, the value chain, is governed. Therefore, these six aspects of movement emphasised by Cresswell (2010) will be used to analyse partnership flows. This is also depicted in the conceptual model on p. 16.

For other previously identified factors, such as trust, risk management and interdependence, conceptualising them as flows is less straightforward, since they do not actually flow from partner to partner through the value chain. Nonetheless, scholars have identified these as relevant factors for effective and satisfactory collaboration (Gereffi, 2014; Gjerald & Lyngstad, 2015; Jensen, 2009; Mwesiumo et al., 2019; Mwesiumo & Halpern, 2018; Song et al., 2013; Yodsuwan & Butcher, 2012). Therefore, these will be referred to as partnership qualities.

It is important to note that even though these flows and partnership qualities have been conceptually separated, in reality they are very much intertwined. Changes in flows could impact these partnership qualities and vice versa. The fact that this separation is merely conceptual, has been visualised by the dotted line between the two.

Another aspect of this research is the influence of the COVID-19 crisis on partnerships between ITOs and OTOs. As mentioned in section 2.1.3 on risks and external shocks, current literature points out that ITOs in destinations depend on their overseas partners both prior to a crisis (for building resilience) as well

directly after a crisis (for marketing purposes) (Mair et al., 2016). Both presumed dependencies are depicted in this conceptual model. The former is depicted through the impact of the partnership and value chain governance on resilience on both sides of the partnership. Whereas the latter is depicted through the arrow from external shocks to line that depicts the partnership. Additionally, an arrow from external shocks directly to value chain governance has been added, as a crisis does not only influence the flows and qualities themselves it also impacts how flows are guided and who has the power to do so.

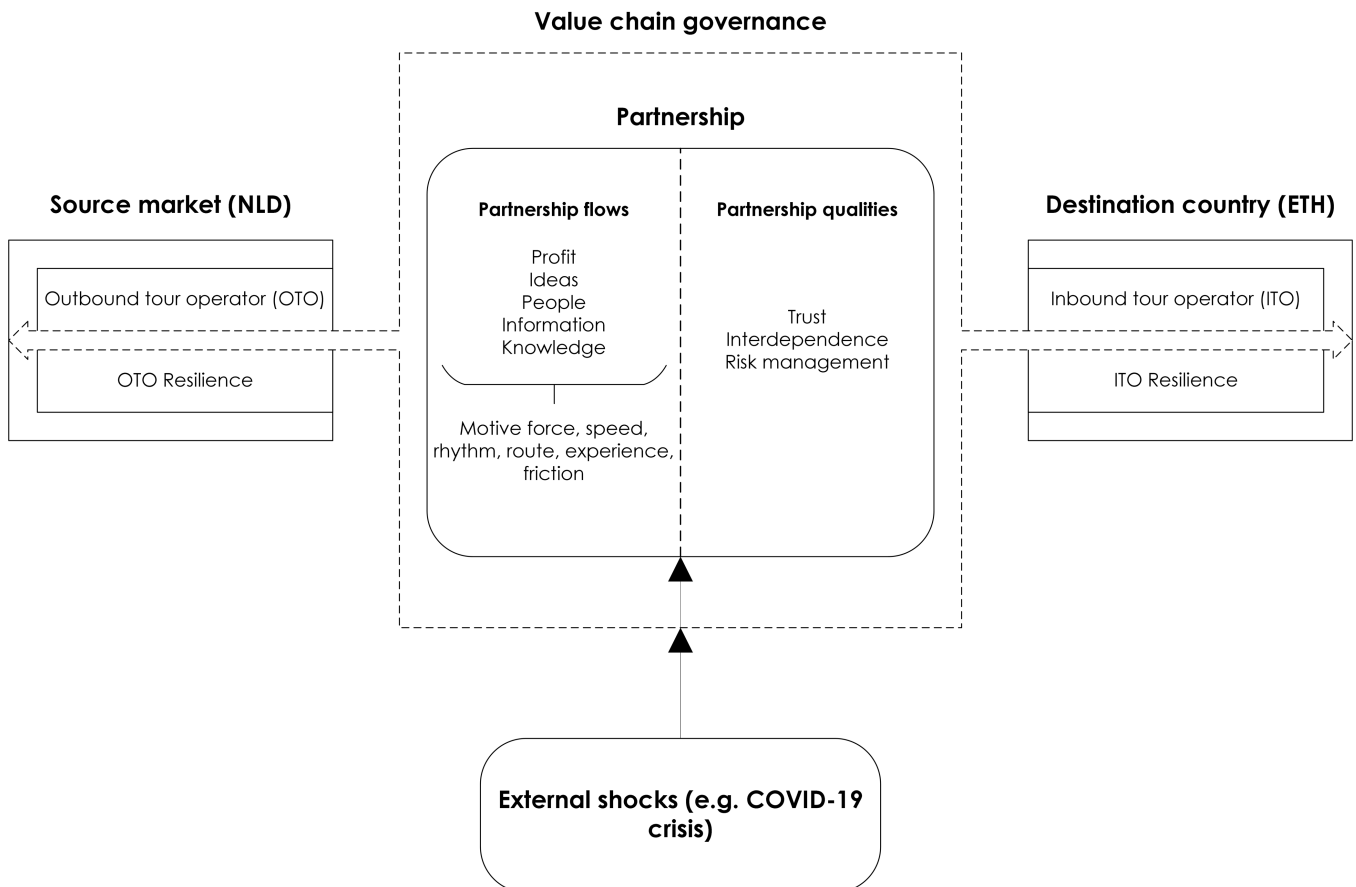


Figure 3: Conceptual model (source: by author)

### 2.3 Research questions

A critical selection of concepts and a thorough literature review resulting in the previously identified knowledge gaps and conceptual model, has led to the following main research question:

*How do partnerships between Dutch outbound tour operators and Ethiopian inbound tour operators shape opportunities and constraints for Ethiopian inbound tour operators, prior to and during the COVID-19 crisis?*

This research question will be answered after investigating the following sub questions:

- *What do the partnership flows and qualities say about the governance of the value chains these partnerships are a part of?*
- *How have the partnership flows, qualities, and value chain governance impacted the resilience of Ethiopian inbound tour operators?*
- *How has COVID-19 impacted partnership flows, qualities and value chain governance?*



### **3. Regional Thematic Framework**

In this section, the development of outbound tourism from the Netherlands will be discussed, specifically focusing on tourism to Ethiopia. Furthermore, the tourism sector in Ethiopia will be briefly discussed and general data of the sector will be presented and reflected upon. A short reflection on COVID-19 and the current situation in Ethiopia will conclude this chapter.

#### **3.1 Outbound tourism from Europe and the Netherlands**

Accounting for the generation of 49.9 per cent of the world's international tourist arrivals in 2016, Europe is the largest source region for outbound tourism in the world (UNWTO, 2018a). If one takes a closer look at where Europeans are travelling and how these numbers have developed over the years, it is striking that, notwithstanding several fluctuations, the percentage of Europeans' trips with an African destination country has remained fairly stable over the last 25 years (UNWTO, 2018a). In 1995 19.8 per cent of all interregional travel by Europeans was bound for the African continent of which roughly 20 per cent to East Africa (UNWTO, 2018a). From the trips Europeans made in 2016 bound for a destination outside the region, roughly 18.4 per cent had an African destination of which approximately 21 per cent East African (UNWTO, 2018a). In spite of this relative stability, Europe still remains the largest source market for tourism to the African continent and, more broadly, to developing countries in general (CBI, 2021).

When it comes to tourism to developing countries, there are three European countries that stand out from the rest. Germany, the United Kingdom and France are responsible for almost 50% of the trips to these countries and are then followed by Italy, Spain and the Netherlands (CBI, 2021). In order to obtain insights that are relevant for this thesis, it is necessary to zoom in on these specific countries and flows. For this purpose, several relevant statistics on outbound tourism from these countries for the year 2018 have been presented in Table 1 below.

When reviewing data on outbound tourism from the Netherlands, several noticeable observations can be made.

Firstly, the participation rate of the Dutch population in tourism is one of the highest in Europe. As can be seen in Table 1, 85 per cent of the Dutch citizens have participated in tourism in 2018 (Eurostat, 2018). This was the fourth highest of all EU countries during that year and well above the EU average of 64.4 per cent (Eurostat, 2018). Furthermore, the percentage of the Dutch population travelling abroad is, with 64.3 per cent, almost double the European average of 33.7 per cent (Eurostat, 2018). As a result, the number of residents participating in tourism in the Netherlands was the seventh highest in Europe (UNWTO, 2018). Only Germany, France, the United Kingdom, Spain, Italy and

Poland had more citizens participating in tourism (UNWTO, 2018). As mentioned before, looking at the number of tourists travelling to developing countries only, the Netherlands overtakes Poland and ranks sixth in Europe (CBI, 2021).

Another statistic that is noticeable when reviewing data on outbound tourism from the Netherlands is the high tourism expenditure per capita. A factor that probably plays a large role in this is the GDP (CBI, 2021). The Dutch GDP per capita in 2018 was the highest of all countries listed in Table 1, with a difference ranging from 11 per cent compared to Germany up to 53 per cent compared to Italy.

The high participation rate and tourism expenditure per capita make the Dutch market a rather attractive source market for tourism. Combined with the fact that 73 per cent of all bookings for destinations abroad are made online, the Dutch traveller is relatively easy to reach and doing so is relatively rewarding (CELTH et al., 2019).

Table 1: Outbound tourism statistics for several EU countries for the year 2018

	Germany	United Kingdom	France	Italy	Spain	Netherlands
Total number of outbound trips of 1 night or over (millions)	108.5	58.5	26.9	33.3	19.0	22.1
Participation in tourism for personal purposes (% of population)	75.3	64.08 <sup>1</sup>	74.3	44.9	67.4	85.0
Outbound tourism expenditure per capita (US \$)	1148.28	1036.53	728.58	496.58	569.90	1317.46
Trips to Ethiopia (number of trips)	36,847	42,725	26,804	31,021	No data	15,341

<sup>1</sup> 2016 data

Sources: CBI, 2021; Eurostat, 2018; UNWTO, 2018b; 2018c; The World Bank, 2018

### 3.2 Outbound tourism from the Netherlands to Ethiopia

When it comes to tourism to Ethiopia, the Netherlands has long been in the top 10 source markets for leisure travel (Altes, 2018). However, since 2013 the Netherlands has been overtaken by several upcoming markets. Nonetheless, between 2013 and 2016 the Netherlands has still always been listed in the top 16 (Altes, 2018). A side note has to be made, i.e., statistics about the number of leisure travellers to Ethiopia have to be interpreted with caution, as they are based on how the leisure visas are used. For example, travellers using the leisure visa for a business visit or for a layover of one night are also included in the data (Altes, 2018).

In general, Dutch tourists book approximately one-third of all their trips abroad through a tour operator or travel agency (CELTH et al., 2019). However, since Ethiopia is a relatively unknown destination and since concerns about security and safety are widespread among Dutch tourists traveling to Ethiopia, tour operators and travel agents continue to be an extremely important channel (Altes, 2018). It has been observed that most European outbound tour operators work with local inbound tour operators who compile, sell and execute packaged tours including all services provided in the destination (Altes, 2018). This observation makes Ethiopia a particularly interesting and well-suited case for this thesis.

An analysis of the Ethiopian tourism value chain performed by the Dutch Centre for the Promotion of Imports from developing countries (CBI) includes an analysis of such tour packages offered in different European source markets. A selection of data from this analysis has been presented in Table 2.

*Table 2: Data on tour packages including Ethiopia offered in different European source markets*

	<i>Germany</i>	<i>United Kingdom</i>	<i>France</i>	<i>Netherlands</i>
<i>Packages including only Ethiopia (% of total packages)</i>	76	83	95	100
<i>Average time spent in Ethiopia per tour (number of days)</i>	16.2	13.1	12.8	19.2
<i>Maximum number of participants per tour (number of people)</i>	12.6	12.3	10	15
<i>Average price per day (euros)</i>	224	251	202	122

*Source: (Altes, 2018, p. 23)*

Altes (2018) states that, since the number of packages analysed was rather limited, the numbers should be interpreted as an indication of differences between markets rather than isolated absolute values. Taking this into account, it is interesting to note several substantial differences between the Netherlands and the other countries.

Tour packages including Ethiopia offered in the Netherlands are more often solely focused on Ethiopia as a destination, allow larger groups and have a relatively low price per day. The last statistic is rather unexpected when compared to the high tourism expenditure per capita presented in Table 1. According to Altes (2018), the main reason for the high price differences can be found in the type of activities offered. She explains that packages offered in Germany are more adventure oriented, French tours were more focused on

engaging with locals, whereas tours offered in the United Kingdom were the only ones that included city tourism (Altes, 2018).

There are several kinds of Dutch tour operators offering trips to Ethiopia. Based on the websites of the Dutch Association of Travel Agents and Tour Operators (ANVR) and the Dutch Association for small scale travel organisations (VvKR), it becomes clear that the supply ranges from largescale travel agencies offering standardised group tours to smaller organisations offering specialised and tailored individual and group tours. Whether these differences lead to important differences in the partnerships with the incoming Ethiopian tour operators has yet to become clear. However, the analysis of the Ethiopian tourism value chain performed by the CBI points to smaller specialised European tour operators being the most interesting partners, as they are more dependent on the incoming operator, are less likely to compete on price and will provide guidance to fulfil the required legal, ethical and service standards (Altes, 2018).

### **3.3 Tourism policy in Ethiopia**

The view of Ethiopia as a country with a tremendous tourism potential has been emphasised multiple times, for example through Ethiopia being selected as the world's best tourism destination by the European Council on Tourism and Trade in 2015 (Ali, 2016; Gidey & Sharma, 2017).

The Ethiopian government has been aware of this potential for a number of decades now, as tourism started to play a role in policy making in the 1960s (Ali, 2016). However, Ethiopia's shift to military dictatorship and socialism in 1974 has had devastating effects on the tourism industry (Kumar, 2018; Ministry of Culture and Tourism, 2015; Sintayehu, 2016; Tafesse, 2016). These were not limited to the direct effects during the time of the conflict but have created a negative image according to which Ethiopia is associated with, among others, famine, poverty and droughts (Ministry of Culture and Tourism, 2015; Sintayehu, 2016). This negative image has led to difficulties in promoting the country as a tourist destination. However, since 2001 the tourism sector in Ethiopia has been steadily growing due to the continued efforts of the country's governments to promote tourism (Ali, 2016). In 2015, the Ministry of Culture and Tourism (MoCT) published the 'Sustainable Tourism Master Plan 2015-2025' (STMP), in which the Ministry states its vision that "Ethiopia will become one of the top 5 tourist destinations in Africa by 2025" (MoCT, 2015, p. 100).

In this plan the MoCT outlines its ambitions, goals and challenges for the future of tourism, based on extensive stakeholder consultations throughout the country (MoCT, 2015). It attempts to do so by adhering to the following five shared values (MoCT, 2015, p. 101):

- Community participation and empowerment
- Respect and preservation of Ethiopia's cultural and natural heritage
- Gender mainstreaming
- Stakeholder partnerships
- Recognition of the devolved system of government

Besides mentioning the importance of partnerships of any kind in their shared values, the MoCT also specifically acknowledges the need to improve Ethiopia's performance on building cross-border partnerships. The SWOT analysis of the tourism sector points out that "the activities of these [incoming] tour and travel organisers are not well coordinated and the marketing structure that would help to link their activities to the international tour operator channels is not well developed" (MoCT, 2015, p. 65). The tourism strategy presented in the STMP builds on this finding by acknowledging the relevance of building cross-border connections and by formulating a plan of action. This becomes clear, among others, in the following section of the action plan:

***Market the country and its regions at relevant tourism trade fairs and exhibitions***

*Tourism trade fairs and other relevant exhibitions in various parts of the world are increasing becoming an important avenue through which to market the country and its regions to various intermediaries including tour operators, travel agents and even tourists themselves. (MoCT, 2015, p. 120)*

Six years have passed since the publication of the STMP and before the COVID-19 crisis hit, the inbound tourism expenditure in Ethiopia had been steadily rising (UNWTO, 2018d). It seems hard to believe that nothing has changed when it comes to building cross-border connections. Nonetheless, an analysis of the Ethiopian tourism value chain published by the CBI in 2018, points out that among the 467 MoCT-licensed incoming tour operators, partnerships with outbound tour operators are still rare (Altes, 2018). The study points to several reasons, among others, the lack of resources to visit trade fairs, a lack of understanding of quality service and a lack of specialised knowledge and skills (Altes, 2018).

### **3.4 Ethiopia's tourism sector in numbers**

The MoCT makes use of the World Economic Forum's Travel and Tourism (T&T) Competitiveness Index to evaluate its own competitiveness in comparison to

other countries in the region and to identify areas for improvement (MoCT, 2015). At the time the report was published, the 2013 index was the most recent index available. Multiple indexes have been published ever since. In Table 3 below, you will find the scores of Ethiopia throughout the years.

Looking at this data, it is striking to see that even though the number of international tourist arrivals is increasing rapidly, the industry is neither growing in terms of its share in total GDP nor in terms of its share in employment. Furthermore, the lack of improvement in Ethiopia's ranking shows that Ethiopia has not improved its competitiveness in the market compared to other countries.

*Table 3: Statistics from the Travel and Tourism Competitiveness Reports 2013-2019 on Ethiopia's travel and tourism industry*

	2013	2015	2017	2019
<i>Rank (total number of countries included in ranking)</i>	120 (140)	118 (141)	116 (136)	122 (140)
<i>International tourist arrivals (number of people)</i>	523,000	681,000	864,000	933,000
<i>T&amp;T industry GDP (US \$, millions)</i>	1,480.3	1,926.4	2,504.2	3,218.5
<i>T&amp;T industry GDP (% of total GDP)</i>	4.3	4.2	4.1	4.1
<i>T&amp;T industry employment (number of jobs)</i>	920,500	985,500	1,013,860	924,400
<i>T&amp;T industry employment (% of total jobs)</i>	3.6	3.8	3.6	3.5

*Source: World Economic Forum, 2013, 2015, 2017, 2019*

These findings suggest that the country is lagging behind in achieving the ambitious goals set out in the STMP. In order to get an idea of the long road ahead to achieve Ethiopia's vision (i.e., becoming one of the top five tourist destinations in Africa by 2025), Table 2 compares Ethiopia with the five most competitive travel and tourist countries of mainland sub-Saharan Africa.

It is noteworthy that in terms of competitiveness, Ethiopia still has a long way to go. There is a gap of nine mainland sub-Saharan countries between Ethiopia and the top five presented in Table 4 (World Economic Forum, 2019). Looking at the data, it is notable that even though Ethiopia has the lowest number of international tourist arrivals, it has the highest number of people working in the tourism sector. Despite the fact that several data collection-related factors could be responsible for this imbalance, such as dealing with informal employment when measuring employment, it seems unlikely that this imbalance is merely to be explained by such factors. Other possible explanations are domestic tourism, the qualifications of the employees or for example the geographical dispersion of tourist attractions.

Furthermore, it is remarkable that regardless of the low number of international tourist arrivals, the contribution of the industry to the GDP is

considerably high. This could potentially be explained by domestic tourism or by differences in tourist target groups, i.e., the tourists going to Ethiopia have more money to spend.

*Table 4: Statistics from the Travel and Tourism Competitiveness Reports 2013-2019 on the five most competitive travel and tourist countries of mainland sub-Saharan Africa and Ethiopia*

	South Africa	Namibia	Kenya	Botswana	Tanzania	Ethiopia
Rank (out of 140)	61	81	82	92	95	122
International tourist arrivals (number of people)	10,285,200	1,499,000	1,363,900	1,574,000	1,275,000	933,000
T&T industry GDP (US \$, millions)	10,499.1	447.9	3,015.6	894.1	2,265.2	3,218.5
T&T industry GDP (% of total GDP)	2.8	3.2	3.4	4.7	4.0	4.1
T&T industry employment (number of jobs)	687,300	41,200	402,000	30,700	492,100	924,400
T&T industry employment (% of total jobs)	4.2	5.3	3.1	3.2	3.6	3.5

*Source: World Economic Forum, 2019*

In the Global Competitiveness Report 2019 (World Economic Forum, 2019), the areas in which Ethiopia scores the highest are price competitiveness (rank: 60<sup>th</sup>), natural resources (rank: 65<sup>th</sup>) and cultural resources and business travel (rank: 71<sup>st</sup>). In terms of price competitiveness Ethiopia ranks especially high on fuel price levels. The high rank on natural resources is mainly caused by the biodiversity and the protected areas including one World Heritage natural site. The high rank on cultural resources is mainly caused by Ethiopia's eight World Heritage cultural sites.

The areas on which Ethiopia scores the lowest are tourist service infrastructure (rank: 138<sup>th</sup>), ICT readiness (rank: 131<sup>st</sup>) and human resources and labour market (rank: 128<sup>th</sup>). The low score on tourist service infrastructure is caused by the lack of ATMs and hotel rooms. Regarding ICT readiness, Ethiopia ranks extremely low on virtually all indicators, e.g., mobile phone and internet subscriptions. When it comes to human resources and labour market, the low

scores can be mainly explained by the secondary education enrolment rate, the degree of customer orientation and the qualifications of the labour force.

Striking is that the areas in which Ethiopia scores particularly high are embedded in the land and the culture, i.e., natural and cultural resources. These are areas that are nearly impossible to develop when they are not present. The aspects in which Ethiopia does not score that high, such as tourist service infrastructure and human resources, present significant challenges, but are generally easier to influence. This emphasises, again, the incredible potential of Ethiopia as tourist destination.

### **3.5 COVID-19 and political conflict**

It is no secret that the impact of the COVID-19 crisis on the tourism industry has been enormous. Between January 2020 and 2021 a worldwide decline of 87 per cent in international tourist arrivals has been recorded, compared to the year before (UNWTO, 2021a). Ethiopia has suffered a decline in international arrivals of 69 per cent in 2020 compared to 2019 (UNWTO, 2021a). These numbers are staggering, even when compared to previous crises in tourism. To illustrate, the SARS outbreak in 2003 led to a global decline of 0.4 per cent in international tourist arrivals and the global financial crisis in 2009 resulted in a decline of 4 per cent (UNWTO, 2021b). The scale of the COVID-19 crisis is truly global and this clearly reflects in the data.

Besides the consequences of COVID-19, Ethiopia is simultaneously going through another crisis with potentially severe consequences for international tourism, i.e., a domestic political conflict. The conflict amounted into fighting starting early November 2020 (see Walsh & Dahir, 2021) and therefore the consequences of this conflict on tourism to Ethiopia have been masked by the enormous declines due to COVID-19. Consequently, it is rather difficult to assess the consequences of this conflict on tourism in Ethiopia. However, looking at the data during the 2016 protests in Ethiopia (see Human Rights Watch, n.d.) leaves room for optimism. In this year of unrest and protests, no decline in international tourist arrivals was recorded. Whether the impact of the current conflict will be different is completely unknown at this point, as it probably greatly depends on the developments during the coming months.

Considering the declines related to COVID-19 and the current situation in Ethiopia, it is needless to say that the data presented in Table 1-4 does no longer apply to the present situation. What does apply to the current situation is largely unknown yet. However, by focusing on cross-border partnerships and the impact of COVID-19, this thesis aims to present a tiny piece in that immense puzzle.



## 4. Methodology

### 4.1 Operationalisation of concepts

#### 4.1.1 Value chain governance

As previously discussed, value chain governance is concerned with how a GVC is controlled, how flows are coordinated throughout the chain and with the power of different actors within the chain to influence this process (Gereffi, 2014). Using the concept of GVC governance to study partnerships between OTOs and ITOs therefore places emphasis on the power dynamics of these partnerships.

Since value chain governance is concerned with the coordination of flows and the power of different actors, information on value chain governance will be extracted from the data on partnership flows and qualities that will be discussed in the following sections.

As can be derived from the research design table on p. 30, when attempts will be made to refer to a certain type of governance, this study will adhere to Tejada et al.'s (2011) tourism-specific adaptation of the value chain governance typology by Gereffi, Humphrey, & Sturgeon (2005). This typology has been discussed in detail in section 2.1.1 (see p. 4) and distinguishes between market, modular, relational, captive and hierarchical value chains.

#### 4.1.2 Partnership flows

The 'new mobilities paradigm' has challenged scholars to look past mobility as mere flows of people and acknowledge the existence and interdependence of many other kinds of flows (Sheller & Urry, 2006). Though conceptually attractive, this view can become somewhat challenging when seeking to operationalise it, as any boundary, category or limitation applied for the purpose of operationalisation would contradict the concept of fluid interdependence. A rather broad operationalisation of the concept of flows is therefore inevitable. In this study, flows between partners are operationalised as: anyone or anything, tacit or explicit, that is mobile between the two collaborating partners.

In the bodies of literature on tourism value chains and partnerships in tourism, several flows were already frequently mentioned, i.e., *people* (Christian et al., 2011; Song et al., 2013), *profit* (Gereffi, 2014; Mwesiumo et al., 2019), *knowledge* (Gereffi, 2014; Gjerald & Lyngstad, 2015; Jensen, 2009; March & Wilkinson, 2009; Mwesiumo et al., 2019; Song et al., 2013), *ideas* (Jensen, 2009; March & Wilkinson, 2009) and *information* (Mwesiumo et al., 2019; Song et al., 2013).

It should be noted that no clear boundaries exist between these different flows. In fact, these flows are interdependent and can overlap (Sheller & Urry, 2006).

As described in the conceptual framework, the six aspects of movement emphasised by Cresswell (2010) will be used to analyse the partnership flows. Using this concept will enable the researcher to extract information on the social relations and power dynamics from the observed flows. Therefore, these six aspects of movement will expose how the partnership and, more broadly, the value chain, is governed. An operationalisation of each of the six concepts will now be briefly introduced.

#### *Motive force*

Motive force, according to Cresswell (2010), refers to the forces that make something or someone go from stationary to moving. In relation to the flows under investigation here, motive force refers to why something starts flowing from one partner to the other. This contributes to uncovering how the value chain is governed as it shows why these flows exist and, for example whether they are voluntary or not.

#### *Speed*

Speed relates to how fast something or someone moves (Cresswell, 2010). In relation to this study, speed points out how fast something flows through the value chain. This could reveal the social relations and power dynamics underlying partnerships, as speed, or a lack thereof, could signal for example privilege or friction, especially when it comes to flows of people.

#### *Rhythm*

Rhythm is the dimension that deals with the patterns of movement and non-movement (Cresswell, 2010). In the partnerships that are the focus of this study, rhythm deals with the patterns of certain flows and the meaning of these patterns. It contributes to exposing the governance of the value chain as it shows how often and in which specific situations certain flows occur.

#### *Route*

The aspect dealing with the routes of flows or movement is what Cresswell (2010) calls route, which comes from the idea that mobility is channelled. When it comes to the focus of this thesis, route refers to the direction of flows and the reasons for and meaning of these directions. This uncovers how a value chain is governed as it draws attention to value chain actors that have the power to channel flows.

#### *Experience*

This aspect focuses on how a certain movement is experienced (Cresswell, 2010). In relation to this thesis, experience refers to how certain flows are experienced by the OTOs and ITOs. It contributes to revealing the social relations

underlying partnerships by focusing on the individual and subjective experience of flows.

### *Friction*

According to Cresswell (2010), friction relates to when and how things or people run into obstacles or stop moving. In relation to this thesis, friction refers to why and when certain flows between partners encounter obstacles or stop. It helps exposing the power dynamics underlying partnerships as it draws attention to obstacles and shows, for example, whether the disappearance of a flow is voluntary or not.

#### *4.1.3 Partnership qualities*

As discussed in the conceptual framework, the bodies of literature on tourism value chains and partnerships in tourism also identified several relevant factors that cannot be conceptualised as flows. These factors have been brought forward as essential for effective and satisfactory collaboration by multiple scholars (Gereffi, 2014; Gjerald & Lyngstad, 2015; Jensen, 2009; Mwesiumo et al., 2019; Mwesiumo & Halpern, 2018; Song et al., 2013; Yodsuwan & Butcher, 2012). Therefore, these factors will be referred to as partnership qualities. As previously discussed, this study focuses on three distinct partnership qualities, i.e., risk management, trust and interdependence.

Risk management refers to the distribution of risk in the value chain and, in the context of a partnership, to the sharing of risks between partners (see Gereffi, 2014; Gjerald & Lyngstad, 2015; Jensen, 2009; Mwesiumo et al., 2019).

Trust refers, rather logically to the presence or absence of trust in partnerships (see Jensen, 2009; Song et al., 2013; Yodsuwan & Butcher, 2012).

Lastly, interdependence refers to the extent to which dependence between partners is symmetric (see Mwesiumo & Halpern, 2018; Yodsuwan & Butcher, 2012).

#### *4.1.4 Resilience*

Resilience is a concept that first emerged in ecology and was later applied to social-ecological systems (Cochrane, 2010). As previously stated, the concept revolves around the amount of disturbance an organisation can absorb (Mair et al., 2016). Even though definitions of the concept differ, most scholars seem to agree that the capacity to adapt is the pivot of resilience (Cochrane, 2010; Dahles & Susilowati, 2015; Mair et al., 2016). Therefore, resilience will be operationalised as the adaptive capacity of the tour operators during the current COVID-19 crisis. Consequently, the impact of the partnership flows and qualities on the operator's resilience will be assessed by reviewing how these aspects have or have not contributed to the operator's capacity to adapt to the crisis.

#### *4.1.5 Impact*

As can be derived from the 'Concepts' column of Table 5, there are two sub questions that aim to assess impact. Firstly, the impact of the partnership qualities, flows and value chain governance on the resilience of tour operators will be reviewed and secondly, the impact of the COVID-19 crisis on the partnership flows, qualities and value chain governance will be analysed. In both instances the impact will be operationalised as perceived impact. The main research question focuses on opportunities and constraints of the Ethiopian tour operator. It is more relevant to assess how those operators perceive those opportunities and constraints as their future decisions will be based on their perceptions and not on whether these perceptions are accurate.

#### **4.2 Methods and techniques**

As becomes clear from the research design presented in Table 5, in-depth interviews have been used as the method of data collection. The exploratory nature of the research questions means that answering them will depend on access to a wide variety of experiences from different tour operators. In-depth interviews specifically provide the opportunity to gain a vast range of insights based on personal experience with the topic and is therefore deemed a suitable method of data collection for this study (Hennink, Hutter & Bailey, 2011).

Nonetheless, it cannot go unmentioned that the exploratory nature of this study also means that it would greatly benefit from focus group discussions as an additional method of data collection (Hennink et al., 2011). Besides, using an additional method would have helped to validate findings through triangulation of data. Ideally, prior to interviewing tour operators, two separate focus group discussions would have been organised, i.e., one with Dutch tour operators and one with Ethiopian tour operators. The benefits of doing this and the reasons for not having organised focus group discussions will be further reflected upon in section 4.5 (see p. 35).

Prior to conducting the interviews, interview guides were developed following the structure suggested by Hennink et al. (2011). Separate interview guides were created for Dutch and Ethiopian tour operators. The former can be found in Appendix A (see p. 80), whereas the latter can be found in Appendix B (see p. 82). Note that the interview guides in Appendix A and B were the initial interview guides. These initial versions have been adapted several times throughout the data collection process.

In total 12 interviews have been conducted between October 2020 and March 2021. The interviews with Dutch participants have been conducted in Dutch, whereas all other interviews have been conducted in English.

Table 5: Research design

Research sub questions	Concepts to be used	Operationalisation of concepts	Method of data collection
<p><i>What do the partnership flows and qualities say about the governance of the value chains these partnerships are a part of?</i></p>	Value chain governance	<p>Information on value chain governance will be extracted from the data on partnership flows and qualities.</p> <p>Following the typology by Tejada et al. (2011) based on Gereffi, Humphrey, &amp; Sturgeon (2005):</p> <ul style="list-style-type: none"> <li>• Tourism market</li> <li>• Modular value chains</li> <li>• Relational value chains</li> <li>• Captive value chains</li> <li>• Tourism hierarchy</li> </ul>	In-depth interviews
	Partnership flows	<p>Anyone or anything, tacit or explicit, that is mobile between the two collaborating partners. Among others:</p> <ul style="list-style-type: none"> <li>• <i>People</i> (Christian et al., 2011; Song et al., 2013)</li> <li>• Profit (Gereffi, 2014, p. 13; Mwesiuno et al., 2019, p. 300)</li> <li>• Knowledge (Gereffi, 2014, p. 26; Gjerald &amp; Lyngstad, 2015, p. 14; Jensen, 2009; March &amp; Wilkinson, 2009, p. 456; Mwesiuno et al., 2019, p. 299; Song et al., 2013, p. 10)</li> <li>• Ideas (Jensen, 2009, p. 145; March &amp; Wilkinson, 2009, p. 456)</li> <li>• Information (Mwesiuno et al., 2019, p. 301; Song et al., 2013, p. 3)</li> </ul> <p>Aspects of movement (Cresswell, 2010, pp 22-26): Motive force, speed, rhythm, route, experience, friction</p>	In-depth interviews

	Partnership qualities	<ul style="list-style-type: none"> <li>• Risk management (Gereffi, 2014, p. 13; Gjerald &amp; Lyngstad, 2015; Jensen, 2009; Mwesiumo et al., 2019, p. 300)</li> <li>• Trust (Jensen, 2009; Song et al., 2013, p. 3; Yodsuwan &amp; Butcher, 2012, pp. 68-70)</li> <li>• Interdependence (Mwesiumo &amp; Halpern, 2018, p. 347; Yodsuwan &amp; Butcher, 2012, pp. 68-70)</li> </ul>	In-depth interviews
<i>How have the partnership flows, qualities, and value chain governance impacted the resilience of Ethiopian inbound tour operators?</i>	Resilience	Cochrane (2010, p. 1); Dahles & Susilowati (2015, p. 37); Mair et al. (2016, p. 15): <ul style="list-style-type: none"> <li>• Adaptive capacity</li> </ul>	In-depth interviews
	Impact	<ul style="list-style-type: none"> <li>• Perceived impact</li> </ul>	In-depth interviews
<i>How has COVID-19 impacted partnership flows, qualities and value chain governance?</i>	Impact	<ul style="list-style-type: none"> <li>• Perceived impact</li> </ul>	In-depth interviews

Source: by author

Interviews have been transcribed verbatim in the language in which they were conducted, and all identifiers have been removed to assure anonymity. All interviews have been coded through computer-assisted coding, using NVivo 12. Following the approach offered by Hennink et al. (2011), code development and analysis were based on the principles of grounded theory, however also acknowledging the importance of deductive strategies. The main reason this approach was selected is that it acknowledges the intertwinement of data collection and analysis, allowing the researcher to improve the quality of the data yet to be collected (Hennink et al., 2011). Considering the limited availability of participants, this proved to be pivotal in ensuring richness of data.

The analysis of the data was done following a specific succession of steps based on the steps provided by Hennink et al. (2011), i.e., description, comparison, categorising and conceptualisation. For each concept listed in Table 5, an overview of issues raised by participants has been created. The issues

raised by Dutch OTOs and Ethiopian ITOs have first been compared to the issues raised by other tour operators within that group. Subsequently, the most apparent issues have been compared to issues raised in the other group. Lastly, issues that were identified under different concepts, but were closely connected were grouped together and these groups have been used to gain a conceptual understanding of the data. Note that, as described by Hennink et al. (2011), performing these distinct steps was done in a circular manner and with overlap between the different steps.

### **4.3 Sampling strategies**

As mentioned by Hennink et al. (2011), the first step in the sampling process was to define the study population. The study population of this research consists of all OTOs from the Netherlands with partnerships with Ethiopian ITOs and all ITOs from Ethiopia with partnerships with Dutch OTOs.

The second step of recruiting participants is selecting a recruitment strategy (Hennink et al., 2011). Due to the COVID-19 pandemic, this research had to be carried out from the Netherlands, which presented significant challenges to the recruitment of Ethiopian tour operators. However, considering the focus on partnerships, the initial idea was to first approach Dutch organisations offering trips to Ethiopia and subsequently requesting them to ask whether their Ethiopian partners would be willing to participate in this research. Identifying Dutch outbound tour operators active in Ethiopia was relatively easy, since many Dutch tour operators are a member of a trade organisation, such as the ANVR or the VvKR. The websites of these trade organisations provide lists of tour operators per destination country and even though the lists had to be filtered, since they included companies that no longer operated in Ethiopia or companies that did not exist anymore, a list of Dutch OTOs that fall within the study population was easily produced.

The list included 14 tour operators that were a member of the ANVR of which eventually three have participated in this study and it included seven tour operators that were a member of the VvKR of which also three have eventually participated. The reasons for organisations not participating included and were limited to not being able to establish contact with the tour operator, the tour operator not being willing to participate, or the tour operator not falling within the study population after all. Some of the tour operators that eventually did not fall within the study population outsourced their trips to Ethiopia to another Dutch tour operator. Following up on this information resulted in one additional participant.

Subsequently requesting the seven Dutch outbound tour operators to ask whether their Ethiopian partners would be willing to participate in this research led to a list of five Ethiopian tour operators of which eventually two have participated in this research. The sole reason for three of the five companies not participating was not being able to establish contact. Since the interviews with

these two Ethiopian tour operators did not result in saturation, further attempts were made to recruit more Ethiopian ITOs. Contacting a Dutch development organisation with operations and a large network in Ethiopia eventually led to a list of three additional Ethiopian inbound tour operators, all of which eventually participated. The sample characteristics are summarised in Table 6 below.

It should be noted that the sample contains one Dutch OTO and one Ethiopian ITO that are not part of the study population. In the case of the Dutch tour operator, it concerned a business that did operate in Ethiopia, but did not have a partnership with an Ethiopian ITO. Whereas in the case of the Ethiopian tour operator, it concerned a business that worked with European outbound partners, but not with a Dutch outbound partner. Nonetheless, the decision was made to include these participants in the sample, due to the challenges of finding enough participants. However, the data resulting from the interviews with these participants has merely been used for contextual information, rather than for the analysis of partnerships.

Considering the sample characteristics in Table 6, it is especially striking that nearly all participants from Ethiopian inbound tour operators were, in fact, Europeans. Even though this is a clear limitation, it is also a relevant finding and therefore will be dealt with in chapter 6 (see p. 49)

*Table 6: Sample characteristics*

Participants	Number
Dutch outbound tour operators	7
Of which ANVR member	3
Of which VvKR member	3
Of which male/female	1/6
Ethiopian inbound tour operators	5
Of which through Dutch partner	2
Of which male/female	3/2
Of which Ethiopian nationals	1
Of which European nationals	4

Source: by author

#### **4.4 Reflection on positionality**

The positionality of the researcher has a major influence on the information collected and thus on the quality of the data (Hennink et al., 2011). When it comes to this study, there are several ways this came to the fore, depending on the tour operator that was being interviewed.

Since the participants on behalf of the Dutch tour operators shared the same nationality with the researcher and had often also obtained a master's degree from a Dutch university, they recognised themselves in the researcher and the researcher's situation. This played a role in their willingness to



participate, as several participants from Dutch tour operators explained that they, too, were once struggling to find participants for their thesis and their memory of this struggle convinced them to participate. This recognition was even further stimulated by their familiarity with Utrecht University as a research institute. These conditions simplified legitimising the researcher's presence and interest significantly.

Besides recognition when it comes to the researcher's situation, many of the participants on behalf of Dutch tour operators assumed some kind of alignment of norms and opinions with the researcher. This specifically became apparent when speaking about cultural differences with Ethiopia and Africa more broadly. Factors that evoked these assumptions are presumably the sharing of nationalities, sharing the same, white, skin colour, communicating in the native tongue and familiarity with the researcher's way of thinking throughout the interview. This assumption of alignment positively influenced their willingness to share their views on these matters, though at the same time obscured the meaning behind what they were saying.

As the sample of Ethiopian tour operators was more diverse in terms of nationality, the influence of the positionality of the researcher differed greatly with each interview. However, nearly all Ethiopian tour operators expressed their gratitude for being interested in Ethiopia and in their work, implicating that they experienced this as a rarity. This seemed to evoke enthusiasm about the study and positively influence their willingness to participate. Prior to starting the interviews, there was a slight concern that the Dutch nationality of the researcher and the fact that the researcher had already spoken to the Dutch tour operators, in some cases even with the partner of the Ethiopian tour operator, would negatively influence the willingness of Ethiopian tour operators to speak negatively about their Dutch partners. Consequently, the researcher placed additional emphasis on the anonymity of the interviews and the absence of any formal links with Dutch tour operators. Even though the participants of the Ethiopian tour operators seemed to speak openly about their experiences with Dutch tour operators, one cannot dismiss the possibility that information was held back.

Furthermore, many of the interviewees of Ethiopian tour operators showed the same kind of presumed alignment of norms and opinions when discussing cultural differences as experienced with Dutch tour operators. Factors that evoked these assumptions are presumably the sharing of European nationalities, sharing the same, white, skin colour and familiarity with the researcher's way of thinking throughout the interview. The fact that these presumptions were absent in the interview with the Ethiopian national, further confirms role of the identified factors.

#### **4.5 Limitations and potential biases**

As is the case with any study, there are several limitations and possible biases to be identified on the basis of this methodology.

One major limitation of this study is that it uses only a single method of data collection, i.e., in-depth interviews. The researcher is aware that triangulation to validate findings with multiple methods is desirable. As previously mentioned, ideally, focus group discussions would have been organised prior to the in-depth interviews. Focus group discussions are especially useful when exploring a relatively new topic, as issues raised by a range of participants can be singled-out on a single occasion (Hennink et al., 2011). These issues could have been used as fundamentals for in-depth interviews, which would presumably have increased the quality and depth of these interviews. Especially the interviews with the Ethiopian tour operators would have benefited from this as the issues raised by them were more diverse than those raised by Dutch operators. However, the current COVID-19 crisis has brought many challenges. Finding participants in Ethiopia while being in the Netherlands proved to be an extremely slow and difficult process. Organising focus group discussions with the Ethiopian tour operators under these circumstances was deemed close to impossible. Taking this into account, combined with significant time constraints, led to the decision not to invest time and effort in trying to conduct focus group sessions.

The limited number of participants leads us to another major limitation. Even though the sample presented in Table 6 has resulted in a significant amount of information relevant to the topic, saturation has not been reached. The reason for not reaching saturation is twofold. When it comes to the Dutch tour operators, the researcher has insufficiently overlapped the data collection and the data analysis process. This disabled the researcher to adequately adapt the interview guide to the issues raised in previous interviews, leading to needing more interviews to reach saturation of data. In the case of the Ethiopian tour operators the researcher did intertwine data collection and analysis, however the number of participants recruited was simply insufficient. As previously stated, finding participants in Ethiopia while being in the Netherlands was rather challenging. As a consequence, the researcher was eventually forced to settle for the current sample size.

Furthermore, the language in which the interviews were conducted might have created a bias. The interviews with the Ethiopian tour operators were mostly conducted in English, which was neither the native tongue of the researcher nor of any of the participants. This could have influenced the level of comfort of both the interviewer and the interviewee and could have led to a loss of information due to difficulties in expressing oneself. Moreover, it could have resulted in an asymmetry or a bias, since interviews with Dutch tour operators were conducted in both the researcher's as well as the participant's native

tongue. This bias has possibly been intensified by the issues discussed in the reflection on positionality.

## 5. Partnerships and value chain governance

This is the first of three chapters in which the main results of this study will be presented and analysed. This will be done by focusing on the different sub questions stated earlier. The first two chapters focus on these partnerships prior to the COVID-19 crisis and will concentrate on the following question:

*What do the partnership flows and qualities say about the governance of the value chains these partnerships are a part of?*

This chapter will paint a general picture of the power balance within partnerships between Dutch OTOs and Ethiopian ITOs and the resulting value chain governance type. This will be based on some of the most commonly identified flows, i.e., price communication and profit, and the partnership qualities interdependence and risk management. Thereafter, this general picture will be nuanced by zooming in on flows and partnership qualities that slightly alter this general picture. In section two of this chapter this will be done by focusing on the 'depth' of partnerships by focusing on flows of personal information, ideas and knowledge, whereas the final section of this chapter will concentrate on the channelling force of institutions. Chapter 5 further serves to bring nuance to this general picture by focusing on forms exclusion from the value chains.

As previously explained, adhering to the concept of fluid intercedence as promoted by the 'new mobilities paradigm', becomes particularly difficult when operationalising a flow perspective. For analytical purposes this chapter will often mention specific flows and partnership qualities that have been identified in the data. However, as also confirmed by Sheller & Urry (2006), these are interdependent and can overlap, i.e., in reality no clear boundaries between the different flows and partnership qualities exist.

### 5.1 Interdependence, price communication and risk: a balance of power

Contrary to what has been written about the balance of power in partnerships between outbound and inbound tour operators (e.g. by Mwesiumo & Halpern, 2018), analysis of the data gathered for this study finds no indication of a clear power asymmetry between Dutch OTOs and Ethiopian ITOs. Rather, the analysis of most flows and partnership qualities suggests that power is relatively well balanced. This section will zoom in on certain flows and partnership qualities to further support this statement.

#### 5.1.1 Interdependence

An argument that has previously been used to support the claim that a power asymmetry favouring OTOs is widespread, is that the replaceability of their

inbound partners makes OTOs less dependent on them, whereas the OTOs themselves are relatively irreplaceable (Mwesiumo & Halpern, 2018).

Focussing on interdependence between Ethiopian ITOs and their Dutch partners does seem to support the idea of OTO irreplaceability. An important source of Ethiopian operators' dependence on their overseas partners, is that in some cases the Ethiopian ITOs depend on just one or a few partners for half of their sales. The loss of such a partner would have far-reaching consequences for the company. Furthermore, several Ethiopian ITOs claimed that finding a new Dutch partner is rather difficult, as many OTOs work with a partner already and are often reluctant to switch, thereby confirming the irreplaceability of the Dutch OTOs.

Despite this irreplaceability of Dutch tour operators, interdependence between Dutch and Ethiopian partners does not appear to be asymmetric. When Dutch tour operators were asked about the possibility of finding a new, similar, Ethiopian partner, most participants immediately pointed to the abundance of tour operators in Ethiopia. Nevertheless, when given the time to think about it, nearly all of them expressed the challenges of finding a partner that matches their quality criteria. In other words, in terms of quantity, finding a new partner would hardly be an issue, however, finding a quality partner presents significant challenges. As a direct result of this dynamic, many Dutch OTOs have had several Ethiopian partners over the course of just a few years. Nonetheless, once they find a reliable partner, partnerships last for years. Some Dutch tour operators even seem to become rather dependent on their partner, as one of the participants claimed that, if it was not for their current partner, the company would not offer trips to Ethiopia at all.

Looking at the observed symmetry in terms of dependence from a value chain perspective, one could argue that the value chains these participants are a part of, portray signs of the relational type of value chain governance. Relational value chains are chains in which the power balance between buyers (Dutch OTOs) and suppliers (Ethiopian ITOs) is more-or-less symmetric and mutual dependence between partners exists (Tejada et al., 2011). Furthermore, according to value chain governance typologies, relational governance exists in chains where the product and/or transactions are complex and thus, specialised and often scarce suppliers are needed (Gereffi et al., 2005; Tejada et al., 2011).

Issues of complexity of the product and/or transactions have been addressed in multiple interviews. An example is an interview with a participant from a small Dutch OTO. This participant was telling the researcher about the process of planning and organising a trip. At some point in the story, the participant touched upon issues of complexity, as becomes clear from the following fragment:

**Participant:** And then there is something else uhm uhm it is very difficult to for example book rooms so if you are not one hundred per cent sure that a certain tour will take

place uhm then you can't book the uhm . . . book the rooms, unless you make a down payment, well obviously in some cases you do that, but in other cases you don't. So that means that you also always squabble over the hotels. Uhm the same goes for local guides, uhm yes you do need to build really good relationships with local guides in order to be able to also use the good ones for your customers. Uhm local guides are mandatory right, even though there are some there are some people who try to uhm uhm bypass that but we obviously find it very important to use local guides. Uhm uhm then there is the fact that Ethiopians don't trust each other at all and so that means that everything you have to organise in the area uhm or the country, is just very difficult to organise because they don't trust each other and something could just suddenly go wrong. Then there is the fact that there is always the possibility of some unrest somewhere, uhm and then on top of that there is the thing that people uhm people don't want to disappoint and don't say 'no' and so rather talk around something and because of that you are also never fully sure uhm how things really are and if it is true what is being said, uhm that the road was blocked or uhm uhm that the hotel was double-booked. Uhm that makes it uhm for uhm for many international tour operators very difficult to work with Ethiopia and even we can't guarantee everything for one hundred per cent.<sup>1</sup>

During the same interview, the participant states that four other Dutch OTOs, two British OTOs and a Canadian OTO have all confirmed to the participant that Ethiopia is one of their most difficult destinations in Africa. Even though such statements cannot be verified and do not provide solid proof that Dutch tour operators indeed experience Ethiopia as one of the most difficult destinations to work with, many of the issues raised by this participant were echoed by other participants. For example, two other participants from Dutch tour operators also referred to communication challenges related to their Ethiopian contacts not saying 'no' and both Dutch and Ethiopian tour operators pointed to issues regarding hotel reservations.

In other words, for Dutch OTOs, operating in Ethiopia involves more complex transactions than most of their other destinations, which creates a dependence of these Dutch tour operators on the capabilities of their Ethiopian partners. This dynamic, combined with the irreplaceability of Dutch tour operators, results in a mutual dependence in these partnerships. It could be argued that this has led to a relative balance of power and a relational value chain. However, if this would be the case, this relational type of governance should also be observed in relation to other flows and partnership qualities.

### *5.1.2 Price communication*

As stated in section 2.1.2 (see p. 8), it has previously been assumed that the more powerful party in a partnership has more influence on the distribution of profits (Mwesiumo & Halpern, 2018). In the data of this study, several aspects have been identified to provide relevant information on the distribution of profits, most importantly, flows of communication about prices and the partnership quality risk management. Following the logic of Mwesiumo & Halpern (2018),

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<sup>1</sup> Translated from Dutch

being attentive to price communication and risk management in partnerships between Dutch OTOs and Ethiopian ITOs should provide information on the power dynamics and value chain governance.

Looking at the rhythm of these price communication flows, quite some differences can be observed. These differences mostly originate from the type of trip that is being offered. In the case of predefined group tours, price communication centres around one single moment each year. However, when it comes to individual tailor-made trips, each trip comes with a different price and therefore communication about price occurs with every new trip request. Regardless of these differences in rhythm, the way these flows were experienced among Ethiopian tour operators was comparable. Most Ethiopian tour operators expressed that discussing prices with Dutch tour operators was not experienced as an attack on their profit margin. One participant even pointed out that it is rare for their Dutch partner to negotiate the price they offer.

Participants who did mention negotiations with Dutch tour operators explained that the purpose of these negotiations was usually to change the itinerary of the trip in a way that would lower the price, for example by including cheaper hotels or doing less activities, rather than negotiating the profit margin.

Nonetheless, there were a few instances where profit margins were reduced. Some of these cases referred to situations in which both the Dutch and the Ethiopian tour operator had to lower their margins due to unforeseen circumstances. However, in total, two cases were identified of partnerships in which the profit margin of the Ethiopian tour operators was sometimes lowered after a request from their Dutch partner. In both cases it was stated that these occasions were vastly scarce. One of these two Ethiopian tour operators explained that these scarce requests of their Dutch partner are usually honoured in order to create goodwill and to stimulate the Dutch partner to keep sending as many clients as they have been doing over the course of the partnership. Even though this suggests some form of dominance of the Dutch partners, the rhythm of these occasions, i.e., the low frequency, does not signify a pronounced or consequential imbalance.

Similarly, Dutch tour operators report that price communication is rather effortless and rarely the cause of any issues. Particularly striking is that fierce negotiations with Ethiopian ITOs were deemed rare, even by Dutch operators who were used to intense negotiations with their partners from other destination countries. Furthermore, the information provided by the participants from Dutch tour operators confirmed the impression that much of the negotiations revolve around the specifics of the itinerary in relation to the price, rather than the profit margin.

Overall, it could be argued that the data on price communication suggests a balanced power dynamic between Dutch OTOs and Ethiopian ITOs. This supports the impression of a value chain in which the power balance between

buyers (Dutch OTOs) and suppliers (Ethiopian ITOs) is more-or-less symmetric and, thus, confirms the presence of a relational value chain.

Nonetheless, it has been observed that risks have the potential to disturb the agreed upon distribution of profits. Consequently, in order to obtain a more complete comprehension of each party's influence on the distribution of profits, it is essential to consider risk management.

### *5.1.3 Risk management*

Interestingly, the issues raised by Dutch and Ethiopian tour operators when confronted with questions about risks varied. For example, besides the risks related to the previously described challenges of communicating with their Ethiopian partners, nearly all Dutch tour operators pointed to the continuous possibility of cancellations due to unrests being one of the major risks. Whereas, among Ethiopian tour operators, the disturbance of ongoing trips due to unrests received more attention.

When it comes to the management of risks, some Dutch tour operators pointed out that the costs of cancellations due to unrests are shared based on predefined terms and conditions. The closer the date of cancellation to the starting date of the trip, the higher the burden for the Dutch tour operator. However, other Dutch tour operators stated that the full burden of this risk was to be carried by the Ethiopian tour operators. Even though these are interesting insights, the conclusions that can be drawn based on this information remains limited without being aware of how these risks were experienced by the Ethiopian tour operators. Unfortunately, the Ethiopian partners who were expected to carry the full burden of the cancellations have not been interviewed.

The risk of unrest causing extra costs to an ongoing trip, was usually carried by the Ethiopian tour operator. Nonetheless, Ethiopian tour operators seemed to consider this rather customary, as this was never labelled as unreasonable. When explaining why they carry this risk, the founder and partial owner of an Ethiopian tour operator explained, they "take the responsibility, this is the land where we live, this shit happens". Even though several other minor risk-related issues were mentioned, several Ethiopian tour operators visibly struggled to come up with risks specifically related to partnerships.

Altogether, it could be stated that the interviews have produced insufficient insight in risk management to be able to draw solid conclusions. This relates to both the vast diversity of answers given as well as the absence of certain experiences in the sample. Nonetheless, none of the issues raised in the interviews give reason to believe that a significant imbalance of the burden of risk exists. Furthermore, neither Dutch nor Ethiopian tour operators reported the distribution of risks to be unreasonable or troublesome. Combined with the previously observed balance regarding price communication, the data gathered for this study implies that neither Dutch nor Ethiopian tour operators have a



disproportionate influence on the distribution of profits, thereby reconfirming the overall impression of a balanced power dynamic and a relational value chain.

This section showed how, based on some of the most commonly identified flows and partnership qualities, it could be argued that, from a value chain perspective, the power dynamics in partnerships between Dutch outbound tour operators and Ethiopian inbound tour operators are well balanced. In other words, the data does not suggest that one side of the partnership has significantly more influence on the coordination of flows or the distribution of risks, and no signs of asymmetric interdependence have been found. This leaves the impression of a relational value chain.

Notwithstanding, the data strongly calls for nuance to be added to this general picture. The remaining two sections of this chapter will attempt to do so by focusing on flows of personal information, ideas and knowledge and the channelling force of institutions.

## **5.2 Knowledge, ideas and personal information: the ‘depth’ of partnerships**

### *5.2.1 ‘Depth’ of partnerships*

This section will discuss the first factor that has been observed to bring nuance to the impression of a balanced power dynamic, mentioned in the previous section. This factor will be referred to as the ‘depth’ of a partnership and can be exposed by observing flows of knowledge, ideas and personal information, especially focusing on the remarkable differences between the accounts of different tour operators regarding these flows. ‘Depth’, in this case, refers to the extent to which contact with the partner extends itself beyond the communication necessary for the continuance of day-to-day business operations. Prior to diving into the specifics of these flows it is helpful to demarcate what is meant by these flows in the context of ‘depth’.

Knowledge, ideas and personal information are flows that are closely intertwined with general information flows. Nonetheless, in literature on business partnerships, knowledge and ideas are often identified separately due to their importance for these partnerships (see Table 5, p. 30). The separation of personal information, i.e., information about one’s private life, was a choice made specifically for this study in order to reveal the ‘depth’ of partnerships.

Flows of general information are rarely free of knowledge, ideas and/or personal information. However, the motive force behind the information flows will determine whether the flows can be considered flows of knowledge, ideas and/or personal information. In other words, only when the reason for communicating is to transfer knowledge or to inform about one’s personal life, the flow is considered as such. Flows of knowledge and ideas can then be further distinguished based on whether they refer to knowledge and ideas necessary for

the continuance of day-to-day business operations, or knowledge and ideas not necessary for the continuance of day-to-day business. The former could be, for example, ideas about changing an upcoming group tour due to unrests, whereas an example of the latter is ideas about increasing community participation. When referring to flows of knowledge and ideas in this section, it concerns only the latter group of flows, as these flows will carry the most relevant information regarding the 'depth' of partnerships.

### *5.2.2 Flows of knowledge, ideas and personal information*

The data gathered for this study suggests that flows of knowledge, ideas and personal information between Dutch OTOs and Ethiopian ITOs are rather scarce. Looking at the rhythm and route of information flows, e-mail communication appeared to be most frequent. However, both Dutch OTOs and Ethiopian ITOs reported that e-mail communication mostly regarded day-to-day business and that this channel of communication was rarely used for personal information or exchanging knowledge. Nonetheless, some ideas were reported to be exchanged through e-mail. This particularly concerned ideas closely related to the products offered, e.g., ideas from Ethiopian tour operators concerning new activities that could be added to trips or ideas for FAM-trips<sup>2</sup> in neighbouring countries.

Nearly all Dutch and Ethiopian tour operators also reported flows of information via phone and face-to-face, which were observed to be channels much more frequently used for flows of personal information, knowledge and ideas. Paying attention to the motive force and rhythm of these flows of phone and face-to-face communication immediately reveals a divide among Dutch tour operators.

On the one hand, several Dutch OTOs reported to have frequent phone contact and/or rather frequent face-to-face contact. Phone contact, among this group of Dutch tour operators, has been observed up to weekly frequencies, even during periods where no day-to-day business needed to be handled. Face-to-face contact, although less recurring than phone contact, was still relatively common, with frequencies of at least once a year. Particularly striking is that the motive force behind these flows was, in some cases, reported not to be related to business at all. Reasons for calling ranged from business related matters to simply asking how one is doing, whereas face-to-face contact varied from visiting the office to having dinner with the entire family. This implies that among these Dutch tour operators and their Ethiopian partners, flows of personal information, ideas and knowledge are common. Considering this, the fact that most of the participants from these Dutch tour operators reported to have

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<sup>2</sup> FAM-trip stands for familiarisation trip and refers to trips offered by destination management organisations for outbound tour operators and travel agents with the goal of familiarising these outbound companies with the destination and convincing them to add the destination to their packages. Sometimes also other parties, for example writers for travel magazines and other media are invited to such trips.

become friends with their Ethiopian inbound partners is no longer surprising. In one case, this friendly relationship has also been confirmed by the Ethiopian inbound tour operator, which supports the impression of frequent flows of personal information, ideas and knowledge in these partnerships and, therefore, a rather 'deep' partnership.

On the other hand, another group of Dutch tour operators reported less frequent phone and face-to-face contact and most importantly, the motive force and rhythm of these flows seemed to be entirely dictated by business matters. Especially flows of personal information were extremely rare among this group of tour operators and when these flows were observed, it was mostly before or during formal networking events, such as trade fairs. Flows of personal information outside of this formal setting could even be experienced negatively, as one participant from a Dutch tour operator expressed his frustrations about the Ethiopian partner sending family photos to his private phone number.

Relative to flows of personal information, flows of ideas and knowledge were slightly more frequent among these operators and varied from ideas about sustainability and community participation to exchanging knowledge about each other's businesses and the political situation in Ethiopia. However, neither flows of knowledge nor flows of ideas were observed to be as frequent as they were among the group of Dutch tour operators discussed before. Overall, this group of Dutch tour operators seems to prefer to keep the relationship strictly business focused. Analysing the flows of information reported by their Ethiopian partners further supports this impression. This focus seems to create friction for flows of knowledge and ideas and, particularly, flows of personal information, resulting in more 'shallow' partnerships.

A side note, and limitation, is that the section above mostly focuses on the perspective of Dutch OTOs. The accounts of these participants do contain some information on the perspective of the Ethiopian partners, for example in the case of the family photos. Furthermore, in several cases, interviews with the Ethiopian partners confirmed the information given by the Dutch tour operator. However, overall, the interviews with Ethiopian ITOs have not resulted in enough data on these flows to really explore their perspective on the 'depth' of partnerships.

### *5.2.3 'Depth' of partnerships and value chain governance*

Analysing the data while considering the divide between Dutch tour operators with 'deep' and 'shallow' partnerships, makes it almost impossible to deny that Dutch tour operators belonging to the same group have several things in common. Since this is not a quantitative research, a correlation between the 'depth' of partnerships and these commonalities cannot be confirmed. Nonetheless, it is useful to analyse these commonalities, as they provide an interesting direction for future research and, moreover, they have implications for the power dynamics within partnerships and contain information on the

governance of these value chains. A list of shared characteristics among Dutch operators belonging to the same group is presented in Table 7 below.

*Table 7: Commonalities among Dutch tour operators engaged in either 'deep' or 'shallow' partnerships*

'Deep' partnerships	'Shallow' partnerships
Smaller and/or specialised tour operators	Larger tour operators
Offering few other destinations	Offering many destinations worldwide
Main contacts have strong personal connection to Ethiopia	Main contacts have no strong personal connection to Ethiopia
Rarely visit trade fairs	Frequently visit trade fairs
Rarely negotiate prices	Sometimes negotiate prices

Source: by author

Firstly, as discussed in section 5.1.2, none of the tour operators reported intense negotiations about price. Nonetheless, it was stated that two cases were identified of partnerships in which the profit margin of the Ethiopian tour operator was sometimes lowered after a request from their Dutch partner. Both of these cases belong to tour operators with 'shallow' partnerships, whereas the tour operators who reported to rarely engage in negotiations belong to the group with 'deep' partnerships. Regarding the rationale behind not negotiating prices, multiple Dutch tour operators referred to the importance of the fact many people have to earn an income out of these prices. This type of empathic reasoning strongly suggests a connection with the 'depth' of their partnerships and implies additional influence on the distribution profits for the Ethiopian ITO. Consequently, one could argue that Ethiopian ITOs have more influence on the governance of chains with rather 'deep' partnerships, than they do in chains with rather 'shallow' partnerships.

Secondly, most other commonalities listed in Table 7 above are all presumed to have an influence on interdependence. The number of destinations offered are likely to influence the dependence on Ethiopia as a destination and the same holds for the personal connection with the country. The frequency of visiting trade fairs presumably influences the possibilities of finding new partners, thereby having implications for the dependence on the current partner. Note that the shared characteristics of the tour operators with rather 'shallow' partnerships signify less dependence of Dutch tour operators on their Ethiopian partners, while the reverse is true for tour operators with rather 'deep' partnerships. These asymmetrical dependencies signify a power balance favouring ITOs in chains with rather 'deep' partnerships, whereas they signify a

more powerful position of Dutch tour operators in chains with 'shallow' partnerships. This, again, confirms the impression that that Ethiopian ITOs have more influence on the governance of chains with rather 'deep' partnerships, than they do in chains with rather 'shallow partnerships.

Therefore, the general impression of a balanced power dynamic and a relational value chain, discussed in section 5.1, should be nuanced by considering the 'depth' of partnerships.

### **5.3 Flows of people: the channelling force of institutions**

The previous sections have discussed different aspects of the partnerships between Dutch OTOs and Ethiopia ITOs, based on the analysis of several partnership flows and partnership qualities. Nonetheless, the process of data analysis also brought up several institutional issues, that are not directly part of the partnerships that form the focus of this study. These issues, however, seem to have such an influence on these value chains that their presence cannot be ignored and therefore will be dealt with in this section.

As described by Cresswell (2010), channelling movement is closely related to power. Previous sections have referred to the channelling of flows in several ways. Section 5.1 described, among others, how profit is distributed within partnerships, whereas section 5.2 focused on the channelling of several flows of information. When it comes to channelling flows of people, however, actors outside of the value chains were found to have a significant channelling force.

#### *5.3.1 The media*

One of the actors that the data suggested to have a significant channelling capacity is the media.

Firstly, it has to be noted that one could indeed debate whether the media are to be considered an institution. Discussing the media in this section should not be interpreted as an attempt to interfere or participate in this debate, but is done so merely because the media is a powerful actor external to the TGVC.

When discussing the growth of Ethiopia as a tourist destination, many tour operators referred to the changing image of Ethiopia being one of the reasons for its growing popularity. There are many factors that contribute to a changing image, however several tour operators, among which both Dutch and Ethiopian tour operators, specifically acknowledged the role of the media in this process. These participants similarly explained that negative media coverage, for example in the case of political conflict, has a direct and immediate effect on their sales. On the other hand, they mentioned that positive media coverage, for example Ethiopia's Prime Minister winning the Nobel Peace Prize, contributed positively to the popularity of Ethiopia. These findings imply that choices made by the media, in terms of whether to cover something and/or how to cover

something, could impact the public image of Ethiopia and thereby influence flows of people towards Ethiopia.

The fact that this public image is not always based on facts is showcased by an example given by a European founder and partial owner of an Ethiopian tour operator, who mentioned Ethiopia suffered a significant decrease in popularity due to the Ebola outbreak in 2014. The participant stated that, even though this outbreak mainly took place in West-Africa and Ethiopia was unaffected, the popular image that “Africa is a country” meant that Ethiopia did notice the effects of the outbreak.

Thus, the public image of Ethiopia was found to have a significant impact on the popularity of the destination and several participants linked this public image to media coverage. Therefore, choices made by the media about whether or how to cover certain events have a serious influence on flows of people, which displays the channelling force of the media.

### *5.3.2 The Ethiopian government*

Besides the media, another actor appeared to possess a notable channelling capacity. Several tour operators brought the efforts of the Ethiopian government and semi-governmental tourism bodies under attention when trying to account for Ethiopia’s growth as a tourist destination. These accounts included government activities indirectly impacting tourism and government activities directly aimed at tourism. Activities indirectly impacting tourism were for example improvements in infrastructure, whereas examples of activities directly aimed at impacting tourism were making tourism a government policy priority, increased promotional activities by Ethiopian embassies and professionalised appearance on European trade fairs.

The fact that several tour operators identified the direct and/or indirect influence of the Ethiopian government’s activities on the increasing popularity of Ethiopia as a tourist destination displays the channelling force of Ethiopia’s government.

It seems that Ethiopia is not an exception in this case. A participant from a Dutch OTO mentioned that it is not uncommon for destination country governments to conclude contracts with source market governments to promote tourism to their specific destination. Even though this has not been identified to be the case for Ethiopia specifically, it does show the potential channelling force of destination country governments.

### *5.3.3 The Dutch Ministry of Foreign Affairs*

Lastly, the data suggests that also the Dutch government possesses a capacity to channel flows of people. When speaking about risks, more than half of the Dutch tour operators claimed to follow the travel advice of the Dutch MoFA. In their travel advice, the MoFA works with four colour codes to label areas ranging from green (safe to travel) to red (do not travel) (Ministerie van

Buitenlandse Zaken, n.d.). Most Dutch tour operators stated not to send any clients to areas with either code orange or red. Thus, the travel advice of the MoFA has an enormous impact on flows of people. This is in itself not a surprising conclusion. However, in their annual assessment of the functioning of the MoFA, the Netherlands Court of Audit concluded that the considerations that play a role in changing the colour label of a certain area are unclear, leading to a seemingly inconsistent application of the colour labels (Algemene Rekenkamer, 2020).

In other words, by changing the colour labels of certain areas and countries, the Dutch MoFA influences immense flows of people from the Netherlands to other countries in the world and it does so without transparency of their considerations. Without this transparency of considerations and criteria, it is not possible to properly assess the process of changing the colour codes of certain countries. As a result, the channelling power that comes with controlling the travel advice remains firmly with the MoFA.

The immense channelling force that some institutions possess, places the channelling force of OTOs and ITOs discussed earlier in a different perspective. Channelling flows of people, i.e., control over mobility, is not free from politics and comes with significant power (Cresswell, 2010). Exposing the channelling force of institutions, such as the media and governments, displays the power these institutions have. Furthermore, the fluid interdependence of flows implies that the flows of people channelled by these institutions, are accompanied by many other relevant flows, such as flows of money. Looking at value chain governance from this perspective, shows that the capacity of OTOs and ITOs to govern their value chains is relative and cannot be isolated from the institutional context.

Concluding, this chapter exposed that the power dynamics between Dutch OTOs and Ethiopian ITOs is relatively balanced, which translates itself in a relational value chain with mutual dependence. Nonetheless, the governance of value chains where OTOs and ITOs had rather 'deep' partnerships differed from those where partnerships were 'shallow'. The former type of partnership seemed to place more power in the hands of the ITO, whereas the opposite seemed true for the latter. Furthermore, discussing the capacity of institutions to channel flows of people through these value chains, shows that these chains and their governance cannot be isolated from their institutional context.

## 6. Exclusion from the value chain

Chapter 5 has painted a general picture of the power balance within partnerships between Dutch OTOs and Ethiopian ITOs and the resulting value chain governance type. The same chapter has brought nuance to this general impression by addressing the ‘depth’ of partnerships and the channelling force of institutions. The current chapter remains focused on the same sub question and will continue to add nuance to this general impression by discussing exclusion from the value chains.

The manifestation of what will be discussed in this chapter revealed itself at an early stage of the data collection process and has been briefly mentioned in section 4.3 (see p. 32). When introducing their Ethiopian partners, it was observed that only one out of the seven Dutch tour operators actually worked with a fully Ethiopian-owned partner organisation. Out of the six remaining Dutch tour operators, five worked with operators that were partially<sup>3</sup> owned by Europeans, whereas one Dutch tour operator worked with a partially North American-owned partner. Furthermore, out of the five Ethiopian tour operators in the sample of this study, none was 100 per cent owned by Ethiopian nationals and only two out of five were managed by an Ethiopian managing director. This is striking, especially when considering the fact that out of the 467 tour operators that are officially registered and licensed by the MoCT, 74.3 per cent are Ethiopian-owned businesses (MoCT, n.d.).

In other words, Ethiopian tour operators owned by non-Ethiopians are overrepresented in the sample of this study. This is a clear limitation and simultaneously, perhaps, one of the most relevant findings of this study, as it indicates that the Ethiopian partners of Dutch tour operators are, presumably, disproportionately often non-Ethiopians. The remainder of this chapter will dive deeper into the dynamics and implications of this manifestation by focusing on trust within partnerships and on the importance of trade fairs.

Please note that it is important to be mindful not to fall prey to the temptation of simply ascribing this phenomenon to nationality. Rather, it is necessary to consider the intersectionality and take into account that these European and North American business owners are not only European and North American, they are also, for example, mostly white, they generally have easy access to visas everywhere in the world and they sometimes speak the same European language as their partners in source markets. Note that therefore, the terms Ethiopian, non-Ethiopian, European and North American, do not merely point to nationality but to the diverse aspects these identities encompass.

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<sup>3</sup> In this context, partially mostly means 50 per cent. This relates to an Ethiopian policy stating that non-Ethiopian nationals are only allowed to establish a business together with an Ethiopian business partner.



## **6.1 Trust: the exposure of a system of exclusion**

### *6.1.1 Trust*

Some initial insights regarding this phenomenon can be found in the statements of European ITOs in Ethiopia. Several participants from European ITOs in Ethiopia explained they have an advantage over their Ethiopian competitors, as they are more aware of what European tourists want. Furthermore, they suggested that their advantage was also related to several 'cultural' differences such as the value of punctuality, proactiveness and the speed of communication.

Taking a closer look at the accounts of participants from Dutch OTOs, seems to confirm the idea that communication is closely connected to the phenomenon described above. When introducing their partner, several Dutch tour operators emphasise that their partner not being Ethiopian changes their experience of communicating. Illustratively, multiple times it has been stated that having a European partner in Ethiopia eases communication, as those European partners are said to have a similar understanding of making agreements and promises and they are more aware of the wants and needs of Dutch tourists and tour operators. Often, these statements are preceded or succeeded by referring to negative experiences the participants had with Ethiopian tour operators, directly relating this to 'cultural' factors.

Indubitably, these Dutch tour operators have had many negative experiences with Ethiopian-owned ITOs and many positive experiences with European ITOs in Ethiopia. Moreover, undoubtedly, many Ethiopian tour operators are less punctual, less proactive, less aware of the wants and needs of Dutch tourists and take longer to respond than most of their European competitors. However, several Dutch tour operators seem to entirely link these differences to 'cultural' differences, failing to notice other relevant factors such as previous work experience, experience in working with European tourists, education levels etc.

In other words, in the light of negative experiences, several participants from Dutch tour operators seem to reduce the identities of Ethiopian business owners to solely being Ethiopian. These participants overlook the intersectionality of identities and, thus, connect previous negative experiences merely to the 'Ethiopian-ness' of their partners. This allows for generalisations, which appear to lead to a system of exclusion that is not based on the capabilities of Ethiopian tour operators, but on the mere fact of being Ethiopian or not.

The effects of this dynamic can be observed through its impact on trust. An example thereof is offered by an Ethiopian managing director of an Ethiopian ITO. The participant explained that, when communicating with his European

outbound partners, he often requests help from his tour leaders<sup>4</sup>, who are from the same country as the outbound partners:

**Participant:** It's me it's me who is doing everything, of course I've got also some good tour leaders based in (Western European country), who really helping me in communication of course this this way yes, they really help me a lot. My tour leaders based in (Western European country) did a lot of communication with tour operators and my agent in (Western European country) even and maybe that can help of course, yes, yes, in this regard yes that really helped a lot. That really helped a lot. When they see their citizen, they will uh more be really, more rely on them than if I am going to their office myself. I go most to the, I went mostly with uh somebody from (Western European country) and that will make them better feeling and better trust.

Based on the previously discussed statements of Dutch tour operators and the quote above, it can be argued that trust towards Ethiopians differs greatly from trust towards Europeans or North Americans. In the quoted section, the Ethiopian managing director explains that he experienced a lack of trust when he went to the offices of European tour operators alone, whereas this lack of trust disappeared when he was accompanied by a compatriot of the European tour operator. Consequently, this leaves the impression that the possibilities of finding a partner in Europe are influenced by being either European or Ethiopian. This impression was further confirmed in other interviews. For example, a European General Manager from an ITO in Ethiopia discussed the possibility of finding partners in Europe and explained which factors helped him with that:

**Participant:** Uh because of my language, because uh I speak both languages so it was it was easier to communicate with them uh and uh not not only about it's not only about communication it's also a matter of trust, if they if they know I am from uh from (European country), also (European language) speaking and so on then uh and and if they are sending to us then (European nationality) or (other European nationality) uh clients, uh then you know they they know we have the same uh mentality and so on so that's uh in the end it's as I said uh a a matter of uh trust and uh yeah this is how how we started.

To put it briefly, the data suggests that trust towards Ethiopians differs from trust towards Europeans, which directly influences the possibilities of Ethiopians finding partners in Europe and therefore excludes fully Ethiopian-owned ITOs from these value chains.

Besides impacting the possibilities of finding new partners, this dynamic also seems to influence existing partnerships. The data shows that participants from Dutch OTOs who have an Ethiopian contact with their inbound partner also relate negative experiences with their partners to 'cultural' differences, i.e., the

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<sup>4</sup> A tour leader is someone who accompanies and leads group tours. A tour leader is usually from the same country as the tourists and speaks their language, but is also supposed to have extensive knowledge about the destination.

'Ethiopian-ness' of their partners. This became apparent by the Dutch participants referring to several negative aspects of the communication as typically 'African' or a 'cultural' difference. The prevalence of such generalisations and stereotypes forms an obstacle for the establishment of trust, for even when actual communication improves, the Ethiopian contacts will always remain Ethiopian. Furthermore, they will most likely also impact the establishment of trust with future Ethiopian partners and/or contacts, whether they are satisfied with the communication or not.

An example of the manifestation of this dynamic is again given by the Ethiopian managing director of an ITO. The participant explained that when communicating with his European outbound partners, he often requested help from his tour leaders. Thereafter, he was asked whether he indeed meant that, as an Ethiopian, it is easier to work with European OTOs when another European does the communication for you. He answered with an example about trip evaluation reports that are usually prepared to inform the outbound partner about the successes and failures of trips:

**Participant:** I will I will say so, I will say so, yeah. You know, even sometimes uh, if I tell you one thing for example, let's say uh, uh a tour leader coming from uh from uh a country that speaks his language the language of the group, uh let's say if a Dutch speaking tour leader is coming you know, uh to Ethiopia as a leader and uh and uh he he is not doing his uh work properly but he make a very good report just maybe he could be lying and he could be focusing on his own interest only promoting himself and blabla and then uh . . . if you put all the both reports together they will uh they will uh give more trust on his report than with your report, if I uh, yeah, if I tell you tell you the truth you know it's just, it can be very very rare but this this happens you know, I saw it happening

In the same interview, the Ethiopian managing director also expressed his frustrations that some European tour operators go behind his back to verify certain prices he has told them. The fact that such signals have not been observed with European participants from ITOs in Ethiopia, exhibits the impact of the previously mentioned obstacles for the establishment of trust between European tour operators and their Ethiopian contacts.

### *6.1.2 Trust and value chain governance*

Keeping the sub question that guides this chapter in mind, this section will explore the implications of these differences in trust for the power dynamics and the governance of value chains.

Section 5.1 (see p. 37) was concluded stating that, the power dynamics in partnerships between Dutch OTOs and Ethiopian ITOs are well balanced, which has translated itself in a relational value chain with mutual dependence. Based on the data gathered, this general impression still holds. Nonetheless, it should not be forgotten that the sample of this study included no ITO that was 100 per cent owned by Ethiopian nationals and only two out of five were managed by an

Ethiopian managing director. Moreover, only one out of the seven Dutch tour operators actually worked with a fully Ethiopian-owned partner organisation. In other words, the conclusion of section 5.1 is almost entirely based on partnerships between Dutch OTOs and Ethiopian ITOs partially owned by Europeans and North Americans. Given the newly gained insights regarding trust and its exclusionary effects, one could argue that the power dynamics and governance of chains with Dutch operators and fully Ethiopian-owned partners would vary from the image painted in section 5.1.

Firstly, the finding that a lack of trust negatively influences the prospects of Ethiopians finding partners in Europe, implies that European partners become harder to replace for Ethiopian business owners. Consequently, the dependence on Dutch OTOs is higher for fully Ethiopian-owned businesses than it is for European ITOs in Ethiopia. Following the previously referred to logic of Mwesiumo & Halpern (2018), this increased dependence places the Dutch OTO in a more powerful position, which implies that these Dutch OTOs have more influence on the governance of these value chains.

Furthermore, besides affecting potential partnerships, it has also been discussed that the dynamic addressed in this chapter creates obstacles for the establishment of trust in existing partnerships. This could have severe implications for the power dynamics as well, especially when taking into account the fluid interdependence of partnership flows and qualities, meaning that obstacles for the establishment of trust will most likely have an impact on many other partnership flows and qualities. Unfortunately, the absence of fully Ethiopian-owned tour operators in the current sample makes it impossible to actually observe the impact on existing partnerships.

It cannot go unmentioned that, besides the negative business-related consequences for fully Ethiopian-owned tour operators, this system of exclusion is problematic, in the first place, simply because it is unethical.

An interesting sidenote is that some Dutch tour operators themselves, on some level, also seemed to feel uncomfortable about working with non-Ethiopian partners. This uncovered itself through the immediate rationalising of their decision to work with a non-Ethiopian partner following the reveal of their partner's nationality. An often-used rationalisation strategy by participants from Dutch tour operators, was trying to proof the 'Ethiopian-ness' of their non-Ethiopian partners. Examples of this strategy are given in the following two fragments of interviews with owners from Dutch OTOs.

When telling the researcher about the non-Ethiopian partner they were working with, they stated:

**Participant:** . . . and who is a (West-European), who does live there for twenty-five years already, so who is uh, yeah, more Ethiopian, but does have that European background.<sup>5</sup>

**Participant:** He is not originally, the person I work with, he is not originally an Ethiopian, he is a (North American). But, yes he is born in Africa so actually in his heart he is also an African.<sup>6</sup>

Although relevant, based on the data of this study it cannot be confirmed where this discomfort originates from, which makes it virtually impossible to tie any conclusions to this finding.

## 6.2 The importance of trade fairs

Section 5.3 (see p. 46) showed how partnerships between Dutch OTOs and ITOs in Ethiopia, their value chains and the governance of those chains cannot be isolated from their context. Therefore, it is important to acknowledge that also the exclusion of fully Ethiopian-owned ITOs from these chains, has some roots that do not originate in these chains themselves.

One of the external factors that has been found to contribute to this exclusion is the importance of tourism trade fairs. When asked about finding a new partner, several Dutch tour operators mentioned the importance of trade fairs and, more specifically, half of the Dutch OTOs in the sample stated that they first met a previous or current partner at a trade fair. Similarly, all Ethiopian tour operators also brought up trade fairs when asked about finding new partners. When asked whether it is possible to find a European partner without participating in a trade fair, an Ethiopian participant from an ITO answered that this is rather rare and very difficult. This claim was supported by the statement of a product manager from a Dutch OTO who mentioned to only be willing to start partnerships with ITOs after meeting them at a trade fair.

Observing the widespread relevance of trade fairs from a flow perspective leads to some interesting insights. Considering flows of people, and specifically paying attention to the route of these flows, it is remarkable that all trade fairs referred to by both Dutch and Ethiopian tour operators were trade fairs taking place in Europe. When asked whether there were trade fairs that attracted European tour operators in or close to Ethiopia, two participants from Ethiopian tour operators stated that even though the government is currently playing a more active role, such an event does not yet exist. The nearest trade fair mentioned was in Dar Es Salaam, Tanzania, which is a three-hour-flight away from Addis Ababa. Thus, in order to meet each other to form new partnerships, Ethiopian and Dutch tour operators travel to European trade fairs. The difference in distance these tour operators have to cover signals a power

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<sup>5</sup> Translated from Dutch

<sup>6</sup> Translated from Dutch

imbalance in favour of Dutch tour operators. One could wonder, however, if this power imbalance perhaps refers to a more general power imbalance in the tourism industry and the organisations responsible for organising and promoting these trade fairs. Zooming in on the implications of these flows of people brings us closer to answering this question.

Visiting a trade fair in Europe offers significantly more obstacles for Ethiopian business owners than it does for European business owners in Ethiopia. In other words, an Ethiopian travelling to a European trade fair, experiences more friction than a European travelling to a European trade fair.

First of all, unlike Europeans, Ethiopian nationals need a visa to be able to enter a European country. The visa application process requires Ethiopian nationals to have travel insurance, to provide bank statements as proof of sufficient funds and to pay a fee (German Embassy Addis Ababa, 2020). Thus, besides costing time and effort, this process also costs money.

Having to meet visa requirements and having to go through the visa application process is a form of friction based on nationality and, thereby, one could argue, leads to exclusion based on nationality. Furthermore, in this particular case, this exclusion based on nationality also manifests itself along the lines of race. This dynamic further contributes to the previously stated finding that it is more difficult for Ethiopian-owned ITOs to find European outbound partners. Moreover, it offers an additional explanation of the disproportionate representation of partially European-owned ITOs in value chains with Dutch OTOs.

Secondly, however, when it comes to visiting trade fairs, the amount of actual friction experienced depends not only on nationality. Consider the following fragment of an interview with the owner of a Dutch tour operator who was telling about a conversation she had with her Ethiopian inbound partner about visiting a trade fair in the Netherlands in the near future:

**Participant:** He he he told me, (name participant), this is not doable, because yeah, even only the flight and the accommodation, but then also the prices there. It's a small world there haha<sup>7</sup>

Based on this fragment, one could argue that the necessity to visit trade fairs in Europe does not only lead to exclusion based on nationality, but also to exclusion based on class. For example, for the manager of a large and established Ethiopian-owned tour operator, the visa fee will create less friction than for the sole proprietor of a small and newly established tour operator. The same goes for the costs of, for example, the flight, accommodation, attending the trade fair and the costs relating to the fact that many European countries are, in general,

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<sup>7</sup> Translated from Dutch

more expensive than Ethiopia. Consequently, finding partners in Europe will present less challenges to wealthy tour operators.

The exclusionary effects discussed above do not seem to come from an individual operators' decision, but from the fact that Ethiopian tour operators always have to travel to Europe to attend these trade fairs. This means that the cause of the problem lies with the parties responsible for this, rather than within the partnerships. Reducing these exclusionary effects is, then, also a responsibility of the parties involved.

Even though a thorough discussion of the parties involved and their role in this process, goes beyond the scope of this analysis, it cannot go unmentioned that the organisers of trade fairs and the government of Ethiopia and/or surrounding countries could have a large influence on solving this problem. Regardless of being aware of this problem or not, it seems as though these institutions are already working on solutions. Two Ethiopian tour operators explained how the Ethiopian government increased their efforts to develop and market Ethiopia as a destination and one participant particularly stated that the government attempted to establish a trade fair in Ethiopia. Furthermore, Messe Berlin, the organiser of the ITB in Berlin, the most frequently mentioned trade fair in the data of this study, is already organising trade fairs in for example China, India and Singapore. When it comes to reducing the exclusionary effects of the importance of trade fairs, developments such as these are a reason for optimism.

Concludingly, this chapter exposed how some Dutch tour operators overlook the intersectionality of identities and, thus, seem to connect negative experiences merely to the Ethiopian-ness of their partners. This appears to have allowed for generalisations, negatively affecting trust towards fully Ethiopian-owned ITOs in Ethiopia, both prior to and during partnerships. Combined with the importance of visiting European trade fairs, this dynamic has led to the exclusion of fully Ethiopian-owned tour operators from value chains with Dutch OTOs.

Since fully Ethiopian-owned tour operators are absent in the sample of this study, it is rather difficult to assess the exact impact on this group of tour operators. Nonetheless, two things can be concluded regarding this dynamic.

Firstly, besides potential business-related downsides, the forms of exclusion discussed in this chapter are unethical and should be considered as such.

Secondly, the analysis presented in this chapter suggests that this exclusionary dynamic shifts the power balance in favour of the Dutch tour operator. This implies that, in value chains with Dutch operators and fully Ethiopian-owned partners, the Ethiopian ITOs have less influence on the governance of these chains than suggested by the general image painted in section 5.1.

## 7. Resilience and the impact of COVID-19

After having discussed the specifics of the observed partnership flows and qualities and their implications for the power dynamics and the governance of value chains, the current chapter will focus on resilience and the impact of COVID-19. The questions that will guide this chapter are the following:

- *How have the partnership flows, qualities, and value chain governance impacted the resilience of Ethiopian inbound tour operators?*
- *How has COVID-19 impacted partnership flows, qualities and value chain governance?*

The first section of this chapter will focus on the first of these two sub questions and, thus, on the concept of resilience. As previously discussed, adaptive capacity is the pivot of the concept of resilience. The first section will therefore explore how the partnerships discussed in the previous chapters have impacted the adaptive capacity of Ethiopian ITOs.

Thereafter, the following section will focus on the second question listed above. Firstly, the impact of COVID-19 on the partnership flows and qualities will be discussed. Thereafter, the implications for the power dynamics and governance of the value chain will be analysed. In this section, some of the employed adaptations strategies will be exposed, linking the impact of COVID-19 to the concept of resilience.

Lastly, the importance of government support will be reflected upon.

### 7.1 Building resilience

#### 7.1.1 *Resilience and influence on the distribution of profits*

In section 5.1 (see p. 37) the complexity of Ethiopia as a destination for Dutch tour operators has been discussed. Regardless of this complexity, many Ethiopian ITOs state that the interest in Ethiopia as a tourist destination has been increasing over the years. Both Dutch and Ethiopian operators provide a variety of explanations for this development. Often addressed were the changing image of Ethiopia as a country, the improvement of (tourism) infrastructure, positive publicity because of the Prime Minister's Nobel Peace Prize in 2019, positive feedback of tourists who have visited the country and increased promotional efforts by the Ethiopian government. As a result of this continuous growth, several participants from Ethiopian tour operators reported the last season before COVID-19 to be their best season so far. The following fragment presents an example of such a participant. In this particular fragment the founder and partial owner of an ITO explained what the company has been doing since the COVID-19 crisis started:



**Participant:** Yeah I mean as everyone we are just sitting at home yah, there is no tourism, all things are empty, so because last year was such a great year, in terms of a lot of tourism a lot of income, we have been able to pay all our workers, still we are paying our drivers, still we are paying the girl at the office who works with me and the partner and me still we are getting our salaries

As the example points out, the growth of Ethiopia as a destination has been extremely relevant for the current level of resilience of this tour operator. Since multiple Ethiopian tour operators reported similar growth and nearly all of these operators have been observed to be able to continue paying most of their staff, this is likely to be the case for others as well.

Obviously, a growth in the number of clients especially leads to increased resilience if it is also translated in growth of profit. The observed balance in terms of influence on the distribution of profits, as discussed in section 5.1, therefore plays a pivotal role in this building of resilience. In case the influence on the distribution of profits would be highly asymmetric in favour of the Dutch tour operator, Ethiopian tour operators would have lower profit margins. Following the logic of the participant above, this would imply a lower resilience. However, the observed balance of influence on the distribution of profits has allowed ITOs to build resilience.

### *7.1.2 Resilience and interdependence*

The observed mutual dependence, also discussed in section 5.1 is relevant for resilience as well, as highly unequal interdependence could lead to a dependency regarding resilience. Key to this argument is the understanding of a dynamic that was exposed by the general manager of an Ethiopian ITO who, when asked about the risks of working with partners, mentioned that during the current crisis, the bankruptcy of partners is a real threat. In other words, the resilience of a tour operator working with partners, is as high as its own resilience and that of all of its partners. Consequently, the more dependent one is on a single partner, the bigger the threat.

Illustratively, in section 5.1 it was stated that some Ethiopian tour operators depend on just one or a few partners for half of their sales. As discussed, this creates a dependence of Ethiopian tour operators on their outbound partners since a loss of such a partner, for example due to a bankruptcy, could have far-reaching consequences. Following the logic of the general manager, one could argue that this increased dependence on the OTO implies that the resilience of the Ethiopian tour operator also becomes increasingly dependent on the resilience of the outbound partner. The chances of survival of an Ethiopian tour operator would, in that case, depend on both one's own resilience and the resilience of the partner. Considering this risk-adding dynamic, dependency could be argued to have a negative impact on resilience.

### *7.1.3 Resilience and the 'depth' of partnerships*

Besides interdependence, the observations regarding flows of personal information, ideas and knowledge, i.e., the 'depth' of partnerships, also relate to the adaptive capacity of Ethiopian ITOs. Section 5.2 (see p. 42) described how the data showed a clear divide between Dutch tour operators with rather 'deep' partnerships and operators with rather 'shallow' partnerships. In this section it was stated that participants from Dutch tour operators with rather 'deep' partnerships often considered themselves friends with their inbound partners which seemed to be the reason that several of these Dutch tour operators showed empathic reasoning when speaking about their partners. These feelings of empathy also seem to materialise in flows that affect resilience. In one particular case, a participant from a Dutch OTO explained that, after having run a small COVID-related crowdfunding campaign, money was donated to their Ethiopian inbound partner to show their support. This displays how these feelings of empathy, often witnessed in 'deeper' partnerships, can indirectly contribute to increasing the adaptive capacity of a partner.

Besides empathy, there are other aspects of 'depth' that might have contributed to this donation.

Firstly, this donation could also be related to the fact that Dutch tour operators with 'deeper' partnerships are, as discussed, often more dependent on their inbound partners. As discussed in the previous section, a strong dependence implies that the chances of survival a tour operator depend on both one's own resilience and the resilience of the partner. Consequently, being highly dependent on a partner provides a strong rationale for contributing to building a partner's resilience. Following this logic, the opposite could be argued for Dutch tour operators with rather 'shallow' partnerships. As previously stated, these operators are often larger tour operators offering many destinations worldwide (see Table 7 p. 45). Even though these operators are dependent on their Ethiopian partner because of the complexity of the destination, the loss of a partner in a single destination is barely a threat to their survival. This lack of immediate dependence could be argued to reduce the rationale to contribute to building a partner's resilience. Nonetheless, this is merely an alternative explanation for the finding regarding the donation, and this dynamic has not actually been observed in the data. Therefore, future research should decide on the existence of such a dynamic.

### *7.1.4 Resilience and exclusion*

Moreover, chapter 6 (see p. 49) described the lack of trust towards Ethiopian ITOs, both prior to and during partnerships.

The lack of trust prior to partnerships has led to the exclusion of Ethiopian-owned ITOs from value chains with Dutch OTOs and this exclusion also comes with implications for resilience. It has previously been explained how a lack of trust and the importance of trade fairs makes it more challenging for

Ethiopian-owned ITOs to find partners in Europe. The limited prospect of finding new European partners directly affects resilience, as it implies a lower adaptive capacity for Ethiopian-owned tour operators. In a time of crisis, where the loss of partners becomes a realistic scenario, the Ethiopian-owned tour operator will have less options available to replace such a partner compared to a partially European-owned ITO.

As previously mentioned, fully Ethiopian-owned tour operators are unfortunately absent in the sample of this study. Furthermore, only two out of five ITOs were managed by an Ethiopian managing director. Therefore, the sample has not resulted in enough data to draw conclusions on the effect of the lack of trust towards Ethiopians on resilience in existing partnerships.

## **7.2 The impact of COVID-19**

### *7.2.1 COVID-19 and partnerships*

In section 3.5 (see p. 25) the enormous impact of COVID-19 on the tourism industry has been briefly discussed. Examining the impact of COVID-19 on partnerships between Dutch OTOs and Ethiopian ITOs contributes to further exposing the greatness of this impact.

Firstly, looking at flows of people, it becomes clear that COVID-19 has caused an enormous friction. Nearly all Dutch tour operators claimed that they have not sent a single client to Ethiopia after the pandemic reached the Netherlands in early 2020. Consistent with this image, several Ethiopian tour operators stated that they have not received any clients since March 2020 and that practically none of the trip requests they received, ended up becoming an actual trip. The impact of this friction in flows of people on the partnerships between European and Ethiopian tour operators is tremendous. Key to fully grasping the impacts of this friction, is the realization that the flows of people form the very core of these partnerships. In fact, these partnerships are the formalisation or institutionalisation of these repeated flows of people and the disappearance of these flows strips these partnerships of their meaning. The mere reason that these partnerships are continuing to exist is the prospect of a return of these flows. Considering this, it is rather easy to understand the observation that the friction in flows of people has led to friction in all other flows within partnerships.

When asked about the state of the partnership during COVID-19, nearly all tour operators, both Dutch and Ethiopian, provide a similar answer, stating that there was some contact now and then. This contact usually centred around how each of the partners was doing and around the travel restrictions and COVID-19 measures in Ethiopia. The general manager of an Ethiopian tour operator mentioned this communication to be particularly important in order to let their partners know that they are surviving and that they are prepared to restart operations as soon as tourism flows will resume. In rare cases the

communication extended to the planning of trips for the next season, however in general, communication seemed to be rather basic and limited.

When it comes to this, rather limited, communication, the divide between tour operators with 'deeper' partnerships and those with rather 'shallow' partnership continues to remain visible. Tour operators with 'deeper' partnerships had more frequent contact and/or more personal contact compared to the tour operators with more 'shallow' partnerships. Considering the previously mentioned fact that these Dutch tour operators often considered themselves friends with their inbound partners, this finding is not surprising. As stated earlier, this 'friend-like' relationship sometimes even materialised in actual flows of money. Nonetheless, in the data of this study this example remains rather isolated.

Besides this limited communication, very little flows have been observed after the spread of COVID-19. Furthermore, communication between partners was so trivial that little information about other partnership flows or partnership qualities during COVID-19 could be extracted from them. In fact, in many cases, if it was not for this limited communication, one would not assume there to be any link between the tour operators at all.

Based on the data of this study, one could therefore argue that during the COVID-19 crisis, many partnerships between Dutch OTOs and Ethiopian ITOs nearly come to a complete stop. In itself this is perhaps not an exciting, surprising or even meaningful finding. However, when this finding is linked to the concept of resilience, it becomes relevant.

### *7.2.2 Adaptive capacity during COVID-19*

The observation that many partnerships between Dutch OTOs and Ethiopian ITOs have nearly come to a complete stop means that the adaptive strategies of partners are nearly completely separated from each other. Thus, whereas section 7.1 showed how the process of building adaptive capacity is closely connected to the partnerships, actually employing this adaptive capacity during the COVID-19 crisis seems completely disconnected from them. This detachment of adaptive strategies of Dutch and Ethiopian partners during the COVID-19 crisis is further confirmed by both Dutch and Ethiopian tour operators responding negatively to the question whether these partnerships influence how they deal with the COVID-19 crisis.

In order to fully grasp the impact of COVID-19 it then becomes relevant, to observe the actual adaptation strategies that have been employed by tour operators during the COVID-19 crisis.

Even though many different adaptation strategies have been observed, there are significant resemblances between the approaches adopted by both Dutch and Ethiopian tour operators. When it comes to the Ethiopian ITOs, all but one reported having temporarily diverted to domestic tourism. Furthermore, two out of four reported to be focussing on renting out their cars, including

drivers, for purposes other than tourism. Among Dutch tour operators the most commonly reported adaptation strategy was focusing on European destinations. Even tour operators that did not previously offer any European destinations have been observed to adopt this strategy.

Taking a closer look at these employed strategies, it is noticeable that the localities that are connected through these strategies are less geographically dispersed than before the COVID-19 crisis. For example, several Ethiopian tour operators mentioned that, in order to develop domestic tourism, they have started partnerships with other Ethiopian ITOs. On the other hand, Dutch tour operators that are newly offering European destinations, have also started new partnerships closer to their country of origin. In other words, one could argue that, just as flows of people, private partnerships of both Dutch and Ethiopian tour operators have deglobalized during the COVID-19 crisis.

Interestingly, it became apparent that these strategies were not so much a direct response to changing flows of people, but to government decisions and restrictions. For example, the decision of Ethiopian tour operators to focus on domestic tourism was not reported to be based on a witnessed increase of domestic tourism, rather these operators stated to have looked at the possibilities within the boundaries set by the government and decided to try and develop domestic tourism. Similarly, the Dutch tour operators who added European destinations to their product range, reported to have done so in a response to the travel restrictions for non-EU countries, not in response to a witnessed increase of intracontinental tourism. This exposes how both Dutch and Ethiopian tour operators do not merely act as 'followers' of flows of people but also as 'creators' in the sense that they channel flows of people. Therefore, channelling flows of people within the boundaries of institutional restrictions in such a way that income can be generated is, one could argue, the actual, underlying adaptive strategy employed by nearly all Dutch and Ethiopian tour operators included in the sample during the current COVID-19 crisis.

### *7.2.3 COVID-19 and value chain governance*

After having discussed the influence of COVID-19 on the partnerships and having analysed the adaptive strategies during the COVID-19 crisis, this section will dive deeper into the impact of COVID-19 on the power dynamics and the governance of the value chains in which these partnerships take place.

As previously discussed, Cresswell (2010) argues that there are social relations underlying the concept of mobility, i.e., flows, and that these relations involve the production and distribution of power. Value chain governance, then, is concerned with how these flows are coordinated throughout the chain and with the power of different actors within the chain to influence this process (Gereffi, 2014). Based on these presumptions, this study and its conceptual model (see p. 16) assume that value chain governance only takes shape and becomes real through the flows it guides. Therefore, the finding discussed in

section 7.2.1, i.e., the impression that partnerships between Dutch and Ethiopian tour operators have nearly come to a complete stop during COVID-19, carries immense implications for the governance of value chains.

One could argue that, since governance only becomes real through the flows it guides, the absence of flows implicates that governance is no longer practiced. In other words, this study suggests that the detachment of Dutch and Ethiopian partners during COVID-19 has resulted in a disappearance of governance of their value chains.

At the same time, however, this statement implies that value chain governance will re-emerge immediately as recovery starts to take place and flows between Dutch and Ethiopian tour operators reoccur. This leads to the question whether, based on the data, anything can be said about the impact of COVID-19 on value chain governance from the moment of recovery onwards.

The data of this study seems to suggest that the consequences of COVID-19 result in several changes that could potentially influence the governance of value chains, once partnerships between Dutch and Ethiopian tour operators start to recover.

Firstly, even though participants from both Dutch and Ethiopian tour operators denied that the partnerships had any influence on how they dealt with the current crisis, some did seem to believe that the partnerships could play a role in the recovery process. Consider the following fragment of an interview with the managing director of Ethiopian inbound tour operator. The participant was asked whether he believed that the partnerships he has with OTOs will have an influence on the recovery process after the COVID-19 crisis, and replied as follows:

**Participant:** Possibly yes, it will have influence. Uh because we are in the same uh in the same line in the same uh road so we both are looking for our for our business to revive, to survive, to be back, to recover. . . .So we will do our best to to promote and attract uh customers you know, uh so to motivate individuals to come so you know, I I do send something and they also do the same

Thus, this participant believes that the outbound partners could positively influence the recovery process, mainly due to their ability to reach the market. Later in the interview the participant draws the comparison with a fictional situation in which the participant does not work with outbound partners and explains that, in such a case, it would be significantly more difficult to reach the market and attract customers in the early phase of recovery.

Firstly, these findings signal a potential positive influence of partnerships on the recovery of Ethiopian tour operators. Nonetheless, the account of the participant also has implications for the governance of the value chain.

In the fragment of the interview, the participant points to the mutual interest of OTOs and ITOs to stimulate tourism flows in the early phase of

recovery. However, in cases where outbound operators offer multiple destinations, those operators seem mostly interested in stimulating tourism flows in general, whereas the ITO is solely interested in tourism flows to Ethiopia. One could argue that the emphasised importance of stimulating the market in the early phases of recovery, and the fact that this is particularly done by Dutch OTOs that, in some cases, have the power to channel these flows to different destinations, creates an interdependence asymmetry. This asymmetry could increase the power of Dutch tour operators over their inbound partners in the early phases of recovery. This interdependence asymmetry, as well as the shifting power balance in favour of Dutch tour operators, indicate that in these situations, the power to govern the value chain rests increasingly in the hands of the OTO. When these changes remain intact after the recovery phase, this could signal a shift to a more captive value chain.

A second manner in which the data of this study seems to suggest that the consequences of COVID-19 could potentially influence value chain governance, can be found in analysing the adaptive strategies employed by tour operators. Some of the adaptation strategies that have been observed among both Dutch and Ethiopian tour operators could have a lasting impact on the interdependence in these value chains. As described in the previous section, many of the adaptive strategies of both Dutch and Ethiopian tour operators come down to channelling flows of people within the boundaries of institutional restrictions. This has resulted in a focus, among both Dutch and Ethiopian tour operators, on operations that are completely separate from the Dutch-Ethiopian partnerships. Previously mentioned examples are Dutch OTOs adding European destinations to their product range and Ethiopian ITOs renting their cars and developing domestic tourism. Another relevant example is that several Ethiopian ITOs are currently increasingly focusing on free independent travellers (FITs), rather than, for example, on group tours organised by OTOs. They do this as they expect these FITs to be the first to start travelling again, once the institutional restrictions are lifted. One could state that, rather logically, these adaptive strategies are all aimed at making the tour operators less dependent on their pre-crisis operations. It is imaginable that these adaptive strategies prove successful, i.e., that the new European destinations are doing particularly well or that the focus on FITs is rather rewarding. In these cases, it is conceivable that tour operators will continue to pursue these strategies, even during and after recovery from the current crisis. Since these strategies make tour operators less dependent on their pre-crisis operations, continuing to pursue these strategies will have an influence on interdependence, which could have a lasting impact on the governance of these value chains.

Please note that even though these potentialities are based on the data gathered for this study, most importantly on the analysis of adaptive strategies, they remain mere potentialities. Consequently, this section is, at best, an anticipation on the shifts in power and changes in governance that could take

place once recovery sets in. However, future research should assess the actual influence of COVID-19 on value chain governance during and after recovery.

### **7.3 The impact of government support**

Studying these value chains is decidedly relevant for gaining insights in the building of resilience and the employment of adaptive strategies during the COVID-19 crisis. Nonetheless, also when it comes to this crisis situation, these value chains cannot be isolated from their institutional landscape. This section will therefore discuss an institutional matter that was discussed in nearly all interviews, i.e., the presence or absence of government support during the current COVID-19 crisis.

Among Ethiopian ITOs, government support was mostly stated to be completely absent. An Ethiopian tour operator receiving a soft government loan<sup>8</sup> during the current crisis, was the only case of support that was observed among all Ethiopian tour operators in the sample.

On the other hand, the situation among Dutch tour operators was rather different. Around half of the Dutch tour operators mentioned to receive government support, whereas the other half reported not to receive any support. The reasons for not receiving support were limited to the operator being officially registered in another country than the Netherlands, the sole proprietor of the business being above retiring age and the sole-proprietor of the operator receiving too much income from other sources. In all other cases, government support was observed to be received in the form of salary compensation under the Temporary Emergency Bridging Measure for Sustained Employment (NOW). This temporary measure by the Dutch government is specifically aimed at limiting the loss of jobs during the current COVID-19 crisis (Ministerie van Algemene Zaken, n.d.).

The presence or absence of government support has several implications that relate to dynamics discussed before.

Firstly, one could argue that government support levels the playing field in the sense that it helps smaller and/or less wealthy businesses in their struggle to survive. Therefore, an absence of adequate government support, which seems to be the case for ITOs in Ethiopia, increases the chances that smaller and/or less wealthy tour operators will not survive the current crisis. Consequently, one could state that the absence of government support widens the gap between wealthy and less wealthy businesses and could, in the case of bankruptcies, lead to exclusion based on class.

Secondly, the difference between government support in the Netherlands and Ethiopia could have implications for the governance of these value chains. One could argue that the Dutch government's support in the form of salary

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<sup>8</sup> A soft loan is a loan with rather lenient terms for the borrower.



compensation leads to a decreased dependence on other sources of income, such as core operations. This decreased dependence does not seem to have a direct influence on value chain governance during the COVID-19 crisis. This is due to the finding presented in section 7.2.3, i.e., that flows in partnerships between Dutch and Ethiopian tour operators have nearly disappeared during the COVID-19 crisis, thereby leading to the absence of any form of governance.

Nonetheless, Dutch tour operators' decreased dependence on other sources of income, as a result of the NOW measure, could have implications for value chain governance in the early phases of recovery. Section 7.2.3 stated that governance will re-emerge as soon as recovery sets in and that Dutch tour operators are likely to have more power over their inbound partners in the early phases of recovery due to their ability to channel flows of people. Following this line of thinking, if the Dutch government support would be continued during the early phases of recovery, this would lead to a decreased dependence on core operations for Dutch tour operators, at a time where Ethiopian tour operators are increasingly dependent on their Dutch partners. In other words, this would imply a growing interdependence asymmetry, that could further shift the power to govern the value chain towards the Dutch tour operator.

Lastly, one would assume that the presence of government support positively influences the adaptive capacity of tour operators during the COVID-19 crisis, leading to an increased resilience. However, regardless of the NOW measure, several Dutch tour operators that received this NOW support reported that the COVID-19 crisis has led to the firing of several colleagues. On the other hand, most Ethiopian tour operators reported that they had been able to keep and pay most or all of their employees, even though they did not receive any form of government support. Unfortunately, a direct explanation for these seemingly contradictory findings cannot be found in the data.

Concludingly, this chapter explored how several partnership aspects, i.e., influence on the distribution of profits, interdependence, the 'depth' of partnership and exclusion from the value chain, have impacted the resilience building process of ITOs in Ethiopia. Strikingly, whereas the process of building resilience seemed closely connected to the partnerships, actually employing this adaptive capacity during the COVID-19 crisis seems completely disconnected from them.

Furthermore, it was found that during the COVID-19 crisis, many partnerships between Dutch OTOs and Ethiopian ITOs nearly come to a complete stop. This detachment of Dutch and Ethiopian partners during COVID-19 has resulted in a disappearance of governance of their value chains.

Lastly, by exposing the impact of government support it has been shown that, also when it comes to this crisis situation, these value chains cannot be isolated from their institutional landscape.

## 8. Discussion and conclusion

### 8.1 Discussion of findings

In section 2.1.4 (see p. 12) it was stated that the current state of scholarly work on cross-border private partnerships in tourism suggests a strong divide between literature focusing on tourism as a tool for development and literature focusing on cross-border private partnerships in tourism. The former body of literature was found to often overlook private partnerships, whereas the latter has solely been studied from a business perspective, ignoring the tourism-development debate. This study has attempted to start building a bridge between these two areas by focusing on the opportunities and constraints for Ethiopian inbound tour operators resulting from partnerships with Dutch outbound tour operators, both prior to and during a crisis situation.

#### 8.1.1 *Partnerships prior to COVID-19*

Chapter 5 (see p. 37) focused on the partnership prior to the global COVID-19 crisis. Based on the analysis of interdependence, risk management and price communication, this chapter has drawn a comparison between the power dynamics in these partnerships and the relational type of value chain governance as described by Tejada et al. (2011). Relational value chains are chains in which the transactions are complex and the information is not easily codifiable (Gereffi et al., 2005; Tejada et al., 2011). The complexity requires specialised and highly capable suppliers that are relatively rare (Gereffi et al., 2005). As a result, the power balance is more symmetrical and the costs of switching partners is high (Gereffi et al., 2005; Tejada et al., 2011). Even though Tejada et al. (2011) do not distinguish between outbound and inbound operators, this description matches the type of governance observed in chains with Dutch and Ethiopian tour operators.

This finding is somewhat surprising as it is often assumed that the power balance between outbound and inbound tour operators is in favour of the outbound operators (Mwesiumo & Halpern, 2018).

Furthermore, even though the complexity of Ethiopia as a destination for outbound tour operators has resulted in benefits, such as a more symmetric power balance and mutual dependence, on the long term it might negatively influence the development of tourism in Ethiopia. This negative long term effect comes the finding by Jensen (2009), that perceptions of risks of tour organisers on partnerships in the destination could influence the long-term development of tourism in a specific destination.

Despite this positive image, not all chains included in the sample seemed to be similarly balanced. In fact, several aspects of the partnerships seemed to have implications for the governance of the value chains.

Section 5.2 (see p. 42) focused on the extent to which contact with the partner extended itself beyond the communication necessary for the continuance of day-to-day business operations, exposed by flows of knowledge, ideas and personal information. This was referred to as the 'depth' of partnerships, which revealed a divide among Dutch tour operators with rather 'deep' partnerships, compared to those with rather 'shallow' partnerships. The commonalities among OTOs belonging to the same group signify a power balance favouring ITOs in chains with rather 'deep' partnerships, whereas they signify a more powerful position of Dutch tour operators in chains with 'shallow' partnerships.

Even though it is for future qualitative research to decide on whether the 'depth' of partnerships and these commonalities actually correlate, from a development perspective these power imbalances are relevant. An asymmetric power dynamic favouring the OTO has been argued to lead to the OTO having more influence on the distribution of profits in a partnership (Mwesiumo & Halpern, 2018). OTOs having a disproportionate influence on the distribution of profits, implies more profits flowing out of Ethiopia, indicating a greater leakage of tourism profits (Garrigós-Simón, Galdón-Salvador & Gil-Pechuán, 2015). Thus, it can be concluded that 'deeper' partnerships seem to lead to less leakage and thereby increase the development potential for tourism in Ethiopia.

Furthermore, even though this thesis is focused on partnerships between Dutch and Ethiopian tour operators, it is necessary to realise that these partnerships, and the different flows, qualities and types of governance that come with them, are not infinitely fluid. These partnership flows, qualities and the accompanying types of governance are merely fluid within the boundaries set by the institutional landscape. Section 5.3 (see p. 46) has shown that several institutions outside the value chain, such as the media, the Ethiopian government and the Dutch Ministry of Foreign Affairs, possess the capacity to channel flows within the value chain, especially flows of people. This finding is in line with the claim by (Song et al., 2013), i.e., that a significant amount of power to influence the coordination of flows through the TGVC is allocated to actors who are not directly a part of the TGVC.

From a development perspective, this takes part of the responsibility for tourism development from the hands of private actors and places it, to different extents, in the hands of these institutions.

Whereas chapter 5 claimed that the value chains including Dutch OTOs and Ethiopian ITOs show signs of a relational value chain, chapter 6 (see p. 49) showed that the benefits that come from participating in these chains are not for everyone to enjoy.

The analysis of trust discussed in this chapter showed how Dutch tour operators tend to overlook the intersectionality of identities and, thus, connect

previous negative experiences with inbound tour operators merely to the 'Ethiopian-ness' of their partners. This allows for generalisations, which appears to lead to a system of exclusion that is not based on the capabilities of Ethiopian tour operators. As discussed, this makes it more difficult for Ethiopian tour operators to find European partners and presumably affects trust and governance in existing partnerships between Dutch and Ethiopian tour operators. This dynamic, leading to the exclusion of Ethiopian-owned tour operators, is further aggravated by the importance of visiting European trade fairs discussed in section 6.2 (see p. 54). The data indicates that these are the main reasons for the apparent absence of fully Ethiopian-owned ITOs as partners of Dutch OTOs.

Zooming out, one could argue that this exclusion of Ethiopian-owned operators results in Europeans having significant control over tourism flows. Not only are European OTOs in the position to control flows of tourists from Europe to Ethiopia, also within Ethiopia partially European-owned ITOs direct many of these flows. The fluid interdependence of flows implicates that these partially European-owned tour operators, do not merely direct flows of tourists, but also, for example, flows of money. In that sense, the dynamic observed here is in line with the view of tourism as a technology of rule containing structures, relations and practices of power similar to those during colonial rule, as described by Lacey & Ilcan (2015). In the case of Ethiopia, these structures of exclusion seem to result in a loss of autonomy when it comes to directing tourism related flows.

From a development perspective this dynamic could be problematic. Foreign ownership of tourism activities is often associated with the leakage of tourism income from the regional economy, thereby limiting positive local development impacts of tourism (Budeanu, 2007; Garrigós-Simón et al., 2015). In other words, the exclusion of fully Ethiopian-owned tour operators might result in more money leaving the Ethiopian economy, reducing the development potential of tourism in Ethiopia.

### *8.1.2 Resilience and the impact of COVID-19*

After having discussed these partnerships in a pre-COVID-19 context, this study proceeded by zooming in on the concept of resilience and the impact of the COVID-19 crisis on these partnerships.

Section 7.1 (see p. 57) showed how several aspects of the partnerships have positively contributed to increasing the adaptive capacity of tour operators, i.e., to building resilience. Nonetheless, it was found that a strong dependency on a partner compromises a tour operator's resilience, as the bankruptcy of partners has become a realistic scenario during the COVID-19 crisis. This indicates that the resilience of a tour operator is dependent on its own resilience and that of its partners. Even though this is already a relevant finding, an interesting direction for future research would be, whether a strong dependence then leads to investments in the resilience of a partner.

Furthermore, this section exposed that the lack of trust towards Ethiopian-owned ITOs had a negative impact on the adaptive capacity of these tour operators, as it hinders these operators in finding new partners.

When it comes to these partnerships during COVID-19, section 7.2 revealed that many of these partnerships between Dutch OTOs and Ethiopian ITOs nearly come to a complete stop. This indicates that, whereas the process of building adaptive capacity is closely connected to the partnerships, actually employing this adaptive capacity during the COVID-19 crisis seems completely disconnected from them. This finding corresponds with the claim of Mair et al. (2016), who stated that a lack communication between the destination and the market is one of the main problems in crisis and disaster management. Mair et al. (2016) point to partnerships as a crucial facilitator of this communication. However, the findings of this study do not indicate that partnerships between Dutch and Ethiopian tour operators have fulfilled such a facilitating role.

Regarding the period following the current crisis, the importance of stimulating the market in the early phases of recovery was emphasised. Mair et al. (2016), who found that marketing strategies could play a large role in the recovery process of destinations, have also emphasised this. The importance of stimulating the market seemed to lead to benefits for Ethiopian tour operators working with European partners as opposed to those working without outbound partners. On the other hand, it seemed to increase dependence of Ethiopian tour operators on their outbound partners' ability to direct flows of tourists to Ethiopia. As discussed in section 7.3 (see p. 65), this dependence could become problematic due to the possible consequences of government support. That is to say, if the Dutch government support would be continued during the early phases of recovery, this would lead to a decreased dependence on core operations of Dutch tour operators, at a time where Ethiopian tour operators are increasingly dependent on their Dutch partners. However, during the data collection process, the recovery phase had not started yet and therefore, future research should assess the actual influence of COVID-19 on value chain governance during and after recovery.

From a development perspective, the finding that partnerships have nearly come to a complete halt during the COVID-19 crisis, is particularly interesting. It shows that, in a time of crisis, private sector actors are primarily concerned with their own survival. Interestingly, this finding echoes an often-heard critique regarding tourism and development. Namely, that tourism businesses' focus on individual gains limits the potential for the sector to contribute to development (Holden, 2013). This is part of a wider critique that centres around the usefulness of the private sector for development and can be seen as a response to the prevalence of private sector involvement under the current Aid for Trade regime (Murray & Overton, 2016).

Furthermore, the complete halt of partnerships during COVID-19 reflects another popular critique on the private sector's potential to contribute to development. The more livelihoods depend on market linkages, the more vulnerable these livelihoods are in the face of market volatility and external shocks (Holden, 2013). Therefore, the disappearance of partnership flows during the COVID-19 crisis confirms the argument of Holden (2013) that a complete reliance on tourism is not a sustainable livelihood strategy.

Concluding, one could argue that the paralysis of partnerships between Dutch and Ethiopian tour operators during the COVID-19 crisis, confirms several important critiques regarding the usefulness of tourism as a sustainable promotor of development. In this light, the claim by Holden (2013), that in order for tourism to contribute to development, all stakeholders are required to collectively adopt an approach that is specifically targeted towards development, becomes conceivable.

## **8.2 Reflection**

In order to provide an accurate answer to the main research question, it is essential for the previously discussed findings to be interpreted in the light of several limitations of this study. Several potential biases and limitations were already discussed in section 4.4 and 4.5 (see pp. 33). This section will highlight especially those limitations that were found to have influenced the results.

Firstly, even though the limited sample of this study has resulted in interesting findings, it has also led to limitations. In several cases, the limited number of participants from Ethiopian ITOs, resulted in a lack of data on certain aspects of the partnerships. As indicated, in these instances the researcher relied on the accounts of participants from Dutch tour operators to contain information on the perspective of their Ethiopian partners. This has been the case in, for example, section 5.1.3 (see p. 41) on risk management and section 5.2.2 (see p. 43) on the 'depth' of partnerships. The possibility exists that the information given by these participants on the perspective of their Ethiopian partners is incomplete, biased or even completely incorrect.

In other cases, the limited number of participants from Ethiopian tour operators has led to the absence of relevant perspectives. For example, all Ethiopian tour operators interviewed were partially owned by Europeans or North Americans. Even though this is an important finding in itself, it indicates the absence of unique and extremely relevant perspectives. Especially considering the fact that out of the 467 tour operators that are officially registered and licensed by the MoCT, 74.3 per cent are Ethiopian owned businesses (MoCT, n.d.) This limitation has come to the surface in, for example, section 6.1.2 (see p. 52) on trust and value chain governance.

Several limitations specifically relate to the contributions of this study to specific academic fields.

When it comes to the field of tourism studies, one major limitation is that the mere focus on partnerships between Dutch and Ethiopian tour operators, indicates that this is a case study. According to Medina-Muñoz et al. (2016), however, case studies are overrepresented within tourism literature, especially when it comes to impact studies. Therefore, even though offering new and relevant insights, this aspect of the study lacks originality. Nonetheless, this is somewhat countered by adopting an approach that focuses on both the tourism market as well as the destination, which is rather rare (Song et al., 2013).

Furthermore, when it comes to the field of development studies, this study has aimed to answer to the call by Zoomers & Van Westen (2011) of taking the total development corridor as the unit of analysis. In spite of having taken the full corridor as the unit of analysis, the fact that this study has merely focused on the impacts on one side of the corridor, i.e., that of the Ethiopian inbound tour operator, is a clear limitation. Moreover, in spite of considering the development corridor, development chains of tourism in Ethiopia have remained largely unattended to.

### **8.3 Answering the research question**

Now that the findings have been discussed and the limitations of this study have been accounted for, the research question will be answered. The research question, first introduced in section 1.4 is as follows:

*How do partnerships between Dutch outbound tour operators and Ethiopian inbound tour operators shape opportunities and constraints for Ethiopian inbound tour operators, prior to and during the COVID-19 crisis?*

Based on the analysis of partnership flows, qualities and the governance of these value chains, it can be argued that partnerships between Dutch OTOs and Ethiopian ITOs are well balanced. This has resulted in both Dutch and Ethiopian tour operators significantly benefiting from these partnerships.

Nonetheless, several constraints were found to influence the potential to enjoy these benefits.

The structures of exclusion faced by fully Ethiopian-owned tour operators were the most prominent constraint reflected in the data. Relating this finding to the main research question shows the ambiguity of the question. That is to say, this dynamic exposes constraints for Ethiopian-owned ITOs on the one hand, but reveals opportunities for partially European-owned ITOs in Ethiopia on the other. In spite of this ambiguity, this system of exclusion should be regarded as something negative, in the first place because it is unethical and secondly, considering the potential negative developmental consequences discussed earlier.

Besides exclusion, the 'depth' of partnerships, especially the commonalities among Dutch tour operators with either 'deep' or 'shallow'

partnerships, has implications for the opportunities and constraints for Ethiopian ITOs. Even though qualitative research should point out whether these commonalities are actually correlated to 'depth', it suggests that 'deeper' partnerships offer more opportunities for Ethiopian tour operators, as 'deeper' partnerships seem to place more power in the hands of the ITOs.

Moreover, the findings related to building resilience and the impact of COVID-19 indicate that partnerships do contribute to building resilience of Ethiopian ITOs. Nonetheless, the lack of trust towards Ethiopian-owned tour operators limits the potential for partnerships to contribute to this group's resilience.

Contrastingly, during the COVID-19 crisis, partnerships were not observed to have any direct influence, as nearly all partnership flows seem to disappear. During the recovery phase, however, the partnerships do seem to lead to benefits. Especially the benefits that come from the OTO's ability to direct flows of tourists, form a relevant opportunity in this recovery stage. However, the data suggests that these benefits also lead to dependencies, particularly in partnerships with larger tour operators offering multiple destinations.

Concluding, it can be argued that partnerships between Dutch OTOs and Ethiopian ITOs have the potential to offer significant opportunities to Ethiopian ITOs, prior to and, potentially, after crises. However, these opportunities seem significantly limited for fully Ethiopian-owned tour operators, due to a system of exclusion facing this specific group.

Furthermore, even though the dynamics within these partnerships are important, the totality of opportunities and constraints are shaped by both these partnerships themselves as well as by several influential actors in the institutional landscape in which these partnerships are set.

#### **8.4 Policy recommendations**

Based on the findings presented and the answer to the research question discussed in the previous section, Table 8 below presents several policy recommendations. The recommendations and their aims are based on the issues raised in the discussion of findings.



*Table 8: Policy recommendations*

Actor	Recommendation	Aim	Relation to findings
European trade fair organisers Ethiopian Tourism Board	Cooperate in order to organise a trade fair in Addis Ababa that will attract European OTOs	Helping fully Ethiopian-owned to attract European partners	Chapter 6.1 and 6.2
Ethiopian Tourism Board	Provide financial and/or procedural assistance to fully Ethiopian-owned inbound tour operators to attend trade fairs in Europe	Helping fully Ethiopian-owned to attract European partners	Chapter 6.1 and 6.2
Ethiopian government	Government support for tourism businesses in a time of crisis and during the early stages of recovery	Reducing the potential interdependence asymmetry between Dutch and Ethiopian tour operators in the early phase of recovery after a crisis	Chapter 7.3
Dutch government Dutch associations for tour operators (e.g., ANVR & VVKR)	Strict CSR criteria and training for Dutch OTOs, specifically focused on the involvement of locally owned businesses in the destination, supplemented by diversity training	Making the Dutch OTOs more aware of their impact on destination societies and stimulating them to work with locally owned partners. Furthermore, making them aware of the prevalence and impact of stereotypes and generalisations towards destination country entrepreneurs.	Chapter 6.1
Dutch government	Subsidise social enterprises in the Dutch outbound tourism sector	Simulating the TGVC to collectively adopt an approach that is specifically targeted towards development (based on Holden, 2013, p. 134)	General (see section 8.1.2)

Source: by author

## 9. Bibliography

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# 10. Appendices

## A. Interview guide Dutch outbound tour operators

### Introduction

My name is Aron Vijzelman, I am 25 years old and I am a master student International Development studies at Utrecht University. For my master thesis, I am doing research on partnerships between Dutch and Ethiopian tour operators with a specific focus on crises situations. The questions I would like to ask you today relate to your thoughts and experiences on this topic. Your answers to these questions will be used for this research project only and will be fully anonymised so that no one can identify you with any answers. Your answers may be anonymously discussed with my research supervisor. If there is any question that you do not wish to answer you are free to say so.

Now that you are aware of this information, do you consent to participate in this interview?

If you consent, this interview will be recorded. No one but me will have access to the recording and the recording will only be used to make an anonymised transcript of this interview to make it suitable for analysis. After completion of the thesis the recordings will be destroyed.

Do you consent that this interview will be recorded?

Do you have any questions so far?

### Opening questions

1. Can you tell me something about your company?
  - Probe: when and why did you start this job
2. Can you tell me something about the operations of your company in Ethiopia?
  - Probe: When and why did you/your company start operating in Ethiopia, how did business go before corona

### Key questions

#### PARTNERHIP GENERAL

3. Can you tell me something about the partner(s) you are working with in Ethiopia?
  - **Probe:** when and how did you become partner, what does their organisation look like, previous partners
4. How do you feel about the partnership(s)?
  - **Probe:** positive points, negative points/things to improve
5. Have you ever had conflicts with your current partner(s) and if so, could you tell me something about it?

- **Probe:** if no conflicts maybe disagreements

#### PARTNERSHIP FLOWS

6. Before this crisis, what were things that you typically discussed with your partner(s)?
  - **Probe:** why, how often, do you exchange knowledge, do you exchange ideas (e.g. about sustainability), how did you feel about this communication
7. How do you and your partner(s) determine the prices?
  - **Probe:** how do you feel about this process
8. How easy would it be for you to find a new similar partner(s)?
  - **Probe:** why, how easy would it be for your partner
9. To what extent do you trust your partner(s)?
  - **Probe:** how did trust evolve (immediately or slowly), to what extent do you think they trust you?
10. Could you tell me something about the risks you are exposed to when doing business?
  - **Probe:** How do you deal with these risks; do you discuss them with partner, how do you feel about these risks

#### CRISIS OLD

11. How has your company dealt with previous crises?
  - **Probe:** financial crisis 2008, local (political) crises in Ethiopia, government support, insurance
12. Could you tell me something about the relation with your partner(s) during previous crises?
  - **Probe:** communication + about what, support, how do you feel about that
13. Has the partnership had influence on dealing with previous crises?
  - **Probe:** influence on recovery after crisis

#### CRISIS NEW

14. How is your company dealing with the current crisis?
  - **Probe:** government support, insurance
15. Could you tell me something about the relation with your partners during the current crisis?
  - **Probe:** communication + about what, support, how do you feel about that



16. Has the partnership had influence on dealing with the current crises?

- **Probe:** influence on recovery, influence on recovery after crisis

### **Closing questions**

17. How do you see the future?

- **Probe:** During corona, after corona, for you, for your partner(s)

18. Is there anything related to this topic that you still wish to address or say?

19. Would it be possible to speak to your partner?

- Ask them if you can give me their contact details

Thank you for participating!

## **B. Interview guide Ethiopian inbound tour operators**

### **Introduction**

My name is Aron Vijzelman, I am 25 years old and I am a master student International Development studies at Utrecht University. For my master thesis, I am doing research on partnerships between Dutch and Ethiopian tour operators with a specific focus on crises situations. The questions I would like to ask you today relate to your thoughts and experiences on this topic. Your answers to these questions will be used for this research project only and will be fully anonymised so that no one can identify you with any answers. Your answers may be anonymously discussed with my research supervisor. If there is any question that you do not wish to answer you are free to say so.

Now that you are aware of this information, do you consent to participate in this interview?

If you consent, this interview will be recorded. No one but me will have access to the recording and the recording will only be used to make an anonymised transcript of this interview to make it suitable for analysis. After completion of the thesis the recordings will be destroyed.

Do you consent that this interview will be recorded?

Do you have any questions so far?

### **Opening questions**

20. Can you tell me something about your company?

- **Probe:** when and why did you start this job, how did business go before corona

### **Key questions**

#### **PARTNERHIP GENERAL**

21. Can you tell me something about the partner(s) you are working with?

- **Probe:** how many, when and how did you become partner, what does their organisation look like, previous partners, **Dutch partner**
22. How do you feel about the partnership(s)?
- **Probe:** in general, **Dutch partner**, positive points, negative points/things to improve
23. What are the main differences between the relation with your Dutch partner and with your other partners?
- **Probe:** communication, experience of partnership
24. Have you ever had conflicts with your current partner(s) and if so, could you tell me something about it?
- **Probe:** if no conflicts maybe disagreements

#### PARTNERSHIP FLOWS (SPECIFICALLY DUTCH PARTNER)

25. Before this crisis, what were things that you typically discussed with your Dutch partner?
- **Probe:** why, how often, how did you feel about this communication, difference between **Dutch partner** and other partners
26. Do you and your Dutch partner discuss things that are not related directly to a specific trip or itinerary?
- **Probe:** knowledge about doing business/the tourism sector/culture differences/politics, difference between **Dutch partner** and other partners
27. How do you and your partner(s) determine the prices?
- **Probe:** how do you feel about this process, difference between **Dutch partner** and other partners
28. To what extent do you trust your partner(s)?
- **Probe:** how did trust evolve (immediately or slowly), to what extent do you think they trust you?
29. How easy would it be for you to find a new similar Dutch partner(s)?
- **Probe:** why, how easy would it be for your partner
30. Could you tell me something about the risks you are exposed to when doing business?
- **Probe:** How do you deal with these risks; do you discuss them with partner, how do you feel about these risks

#### CRISIS OLD

31. Has your company experienced previous crises? If yes, how has your company dealt with previous crises?

- **Probe:** financial crisis 2008, local (political) crises in Ethiopia, government support, insurance
32. Could you tell me something about the relation with your partner(s) during previous crises?
- **Probe:** communication + about what, support, how do you feel about that, difference between **Dutch partner** and other partners
33. Has the partnership had influence on dealing with previous crises?
- **Probe:** influence on recovery after crisis

#### CRISIS NEW

34. How is your company dealing with the current crisis?
- **Probe:** government support, insurance
35. Could you tell me something about the relation with your partners during the current crisis?
- **Probe:** communication + about what, support, how do you feel about that, difference between **Dutch partner** and other partners
36. Has the partnership had influence on dealing with the current crises?
- **Probe:** influence on recovery, influence on recovery after crisis

#### Closing questions

37. How do you see the future?
- **Probe:** During corona, after corona, for you, for your partner(s)
38. Is there anything related to this topic that you still wish to address or say?
39. Would it be possible to speak to your partner?
- Ask them if you can give me their contact details

Thank you for participating!