

ACCEPTED VERSION – NOT FINAL VERSION

Introduction

Applied theorising should result in the development of theory and at the same time raise insight **within** the context in which it is employed (Barney, 2014). For alignment to occur there needs to be the conscious selection of theories **to support the understanding of a business context. The premise of this paper is that the business context studied should influence the selection of theory and ‘ways of looking’.** It makes a contribution in seeking better alignment between the theory of **differentiation** - through ‘values added’ - and **the** speciality coffee context, a sector largely populated by independent coffee producers and coffee shops. **Theorising adopts a playful approach, selecting and applying the alternative lens of songlines, with a view to understanding differentiation through values added and extending the scope of theorising across the supply chain and into coffee shops.**

The total value generated by the global coffee industry is \$235 bn (Wheeler, 2016).

The speciality coffee sector has grown in popularity and size (Ferreira, 2017;

Mintel, 2015) and the independent businesses that make up the majority of this

sector have approximately 30% of the UK market share (Allegra Strategies

Project Cafe 2016 UK Report, 2015). Speciality coffee is defined by high quality,

differentiated coffee products (Carvalho et al., 2016) and discernibly different coffee

shop experiences. However, value added concepts do not adequately express ‘values

added’ across the sector and **therefore** the nature of product and service differentiation

is not fully understood. **To** address this issue, songlines are proposed as a lens for the

identification and expression of shared values, songlines being a meaning system of

values transferred through song and story to provide a map and guide to a journey (Chatwin, 1986; Judge, 1998). **This approach** is deemed relevant to **both** the supply of coffee and customer excursions **to** coffee shops. The aim of the study is to explore the nature of ‘values added’ in speciality coffee **through the application of songlines. The findings inform differentiation and consider the implications for further research in this sector. The application of songlines reflects a playful approach to theorising from and for a specific business context, the intended outcome being to bring conceptual and practice based thinking into alignment.** The paper combines academic literature **drawn from a range of disciplines** and context sources; it is **organised as follows. Starting** with an overview of value added concepts and theory, **the discussion identifies the** omission of ‘values added’ **in relation to differentiation.** It proceeds to explore the nature of speciality coffee as a movement differentiated by shared values. Songlines are **then** applied and a conceptual model **developed to encompass** shared values relating to: ecology, journey, integration and attention to detail. **Finally, an** applied research agenda **is proposed** for understanding differentiation through values **added in speciality coffee. The approach is deemed playful in proposing songlines as a metaphor for identifying and exploring values added within a complex business context. The constraint of applying predetermined theories (Badley, 2015; Barnett, 2012; Willis, 2009) - in this case, ‘the value chain’ - is effectively removed.**

Differentiation and adding value – conceptualised in chains

Differentiation strategies are typically analysed in terms of ‘value added’.

Associated literature is rooted in the structural frame, the descriptors being inputs, operations, actions and outputs (Bolman and Deal, 1997). **Value added thinking is**

influenced by the dominant metaphor of value ‘chains’ and the assumption that strategic success is derived through conformity and tightly coupled **transactional** relationships. Porter’s value chain (1985) provides an antecedent to the now widespread term of ‘adding value’ and this concept still influences the articulation of differentiation strategies. It is concerned with action, interaction and workflow within an organisation and demonstrates how business unit strategies are converted into co-ordinated primary and support activities (Mintzberg et al., 1998) to deliver low costs and/or differentiated products and services. Activities that conform to efficiency and quality standards **are deemed to** ‘add value’. With the chain intact, products and data can flow from producers to customers. However, value added concepts and **debate**, give values very little consideration. Values **are seen as** shared beliefs that impact on behaviours and interactions (Thornbury, 2003) **and with this** determines how people make sense of their context (James, 2014). **They reflect a preference for doing things in a certain way (Terrell and Troilo, 2010) and can impact on both business and consumer behaviours. Values may encompass personal, social and cultural interests in addition to business logic, and so their contribution to differentiation is not** directly identified within value and supply chain representations (McPhee and Wheeler, 2006; Walsh, 2011). **Furthermore, little** is known about the transfer of values from business to consumer and **the resultant impact on differentiation.**

Product and service differentiation may reflect the optimisation of specific skills and functions (Grant, 2010), or be a result of capabilities in superior co-ordination and process management (Porter, 1991). The value chain is underpinned by the notion that value added is quantifiable and measurable within organisations and, therefore, **collective** supply chain performance can be assessed in terms of **quality**, cost

and time. Theoretical developments in the form of value adding ‘constellations’ (Normann and Ramirez, 1993) and ‘virtual value chains’ (Rayport and Sviokla, 1995), have integrated information systems as a means of activity co-ordination and product and service differentiation (Jaiswal and Kaushik, 2005; Sawney and Parikh, 2002). However, little is known about the transfer of values between supply related organisations and how these impact on cohesion, integration and relationships between **businesses and customers. In the context of speciality coffee, co-ordination between geographically disparate organisations is vital for differentiation (Valkila et al., 2010). The complex trans-global journey of coffee is supported by configurations of small scale independent businesses (Johannessen and Wilhite, 2010; Ortiz-Miranda and Moragues-Faus, 2015; Valkila et al., 2010), from cultivation (Whittaker, 2006) to roasting (Ferreira, 2016) and coffee shop (Pilgrim, 2016). Extensive inter-organisation collaboration is required to ensure the sustainable supply of coffee and for the story of the coffee to journey to the customer. Both contribute to differentiation in terms of product attributes, discernible tastes and coffee shop experience. Global value chains for coffee are complex and geographically dispersed, Ponte and Sturgeon (2014) acknowledge the need for governance and quality management throughout supply, yet the values that underpin inter-firm relationships remain underexplored.**

Knowledge sharing, **relationship enhancement** and relationship development skills and are a product of supply chain functioning (**Hammervoll, 2009**). McPhee and Wheeler (2006) note that an organisation’s supply chain connections and external relationships are part of the value-added proposition **and therefore the** boundaries between the contributions of individual organisations and their **customers are blurred.**

The implication is that good internal and external relationships are crucial for effective value systems.

While little is written about what binds the supply of speciality coffee with coffee shops, there are strategic and operational interdependencies. Drinking quality coffee (produced by a unique supply system) is likely to impact on the look and feel of the coffee shop as well as in-store behaviours - known as coffee sociality (Bookman, 2014). Coffee shop space and place forms part of the differentiating proposition. Coffee shops may be perceived as attractive places to be, thereby influencing perceptions of the surrounding area (Steel, 2016). As Ferriera (2017) notes

Each individual cafe represents a different site of potential sociability, and therefore has the potential to take a different role in the community. p. 70

The accrued **benefits of sector wide relationships** are difficult to determine **in the sense that** not all relationship outcomes can be measured (Argyle, 1991; Hammervoll, 2009; Mattysens and Van der Blute, 1994; Moss Kanter, 1994) or **attributed to specific organisations**. Walsh (2011) proposes a ‘values chain’ to inform policies for sustainable development, acknowledging that multiple stakeholders contribute value **through differentiation**, both tangible and intangible.

Values are an integral part of the **resource based view** of strategy (RBV) (Wernerfelt, 1984; Wills-Johnson, 2008), the strategic agenda being to **nurture, protect and embed this source of differentiation** (Degraevl, 2012) **to support the development of products and coffee shop experiences**. To deliver sustainable differentiation, values should be meaningful (economically), rare, and imperfectly imitable (Barney, 1986); they must **also** be recognised and consciously managed by organisations. **It is proposed that shared values differentiate speciality coffee as a sector but their**

representation is constrained by theories that emphasise the flow of tangible inputs and outputs between organisations. Moreover, there is no conceptual machinery for the expression of values that underpin and support the development of inter-organisational relationships. Value added theory is typically organisation focused, whereas values can also be contributed through customer interactions (McPhee and Wheeler, 2006). In speciality coffee, customer sociality influences perceptions of product and place. The following section explores the characteristics of the speciality coffee context and explains the growing importance of values.

Differentiation and the speciality coffee context

Speciality coffee is a sector characterised by distinct approaches to sourcing, processing, brewing and serving coffee (Carvalho et al., 2016; Manzo, 2014; Meikle-Janney, 2016), creating the capacity for a unique and variable product and differentiated coffee shop experience (Van der Merwe and Maree, 2016). **It is a sector populated by** businesses that have evolved product and service differentiation through stronger association between the taste of coffee **and the origin and variety** of beans. It uses high grade coffee (Carvalho et al., 2016; Donnet et al., 2010; Ponte and Gibbon, 2005) to deliver tastes that reflect the ‘terroir’ of the coffee. It is also known colloquially as the ‘third wave’ (Manzo, 2014); this term **refers to** the evolving nature of quality, both in terms of intrinsic product attributes and the coffee shop experience.

Coffee in waves

The first wave of coffee was characterised by the widespread growth in consumption through the innovation of instant coffee, a commoditised product - subject to price competition - consumed in or out of the home. The second wave raised

the importance of quality **in terms of the** coffee bean and roast. This phase was energised by the growth of **national and international coffee shop chains** in the 1990s, which redefined coffee as a differentiated product, experienced within the dedicated **space** of a coffee shop (Ferreira, 2017; Simmons, 2004). **The second wave capitalised on changing urban land use and the availability of newly vacant properties for ‘brandscaping’, where coffee could be sold and consumed in themed spaces to enhance the sensory outcomes of the experience (Bookman, 2014; Nadiri and Gunay, 2013).** The **coffee shop** multiples were instrumental in establishing a global coffee menu and offering a range of drinks made from freshly ground Arabica beans **using** espresso machines. In the UK, the second wave generated a coffee culture in which coffee shops became **social and economic hubs, new businesses moving in to re-inhabit vacant space in urban centres (Dobson, 2016).** It is now host to a **varied typology of coffee shop businesses, including global multiples, national chains, franchises and independents (Ferreira, 2017).** According to Florida et al. (2010) the social processes of innovation and entrepreneurship are conducive to city life. From a social network perspective, entrepreneurship prospers through **relationships that support access to resources and market understanding (Pellinen, 2014).** In urban centres, coffee shops were sited to capture the journeys and **footfall of those passing through and stopping off for business or pleasure (Shiau, 2016) redefining urban spaces both culturally and economically.** The growth of the international chains became associated with the gentrification of urban centres (Kern, 2016), to some extent marginalising other social communities and challenging the place and prominence of independent food and drink retailers. The second wave **also** created a new community of coffee enthusiasts (Harkin, 2011) bound together through learned

coffee sociality **that involved** the relocation of work activity. Coffee has long been associated with **innovation, networking and community** (Cowan, 2005), from the coffee shops of the 1700s (known as penny universities), where political debate took place, to the modern day talk of work meetings and networking events. The coffee shop servicescape has drawn the back-office functions of business out into public spaces, **offering seating areas designed specifically for meetings and portable technologies.** **The evolution of the third wave has continued to impact on the location** and design of coffee shops. The contemporary servicescape of **the** third wave coffee shop provides a context for the transfer of ideas; businesses benefit from the meet up possibilities, networking space and accepted practice of working in public (**Hodge, 2016**). **Drinking coffee is a sensory experience, reflecting playfulness through pleasure seeking (Starbuck and Webster, 1991) and there is a nuanced relationship between work and play. Coffee shops accommodate work and social opportunities that are merged through the sociality. Purposeful work can come from playful meetings. Hodge (2016) identifies an atmosphere that is conducive to creative thought, not only for work, but for self-reflection. Customers become creative about building networks and find opportunities for personal success through playful encounters.** Therefore, differentiation is associated with ‘place’ both in terms of the origin of coffee served and the social environment where coffee is consumed. (Bryant and Sisal, 2016; Manzo, 2010). Having a cup of coffee has become socially complex (Barney, 1986), the taste and constituent qualities of coffee¹ combining with sentiments of “when and where” of the coffee shop.

¹ The status of speciality coffee is awarded to coffee batches that achieve 80 points or more on the SCAA/SCAE sensory scales. Points are awarded for aroma, taste, aftertaste, acidity, body uniformity, balance, clean cup and sweetness. (Carvalho et al., 2016)

In contrast to the second wave, the third wave presents customers with product and place ambiguities, which can be positive for novelty seekers (Byun et al., 2017). Finding out about the coffee provides the opportunity for the customer to become involved in the experience through questioning and interaction with baristas and business owners. In speciality coffee, the enthusiast has become connoisseur through the availability and acquisition of product and service knowledge. Flavours and origin are explained in tasting notes, detailed menu boards and discussions with baristas. This knowledge transfer is part of the emerging sociality of the speciality coffee shop, enhancing perceived quality and differentiating the experience. Between business and consumer there is a shared sense of knowing coffee. The third wave is a scene populated by skilled baristas and clued up customers (Manzo, 2014), consuming drinks **within** eclectic café **spaces (Steel, 2016). It** is characterised by variation, in terms of product tastes and customised settings **but speciality coffee shops have** a look and feel that can be recognised (**Newall, 2016**). Third wave coffee shops are likely to be independent businesses (**Ferreira, 2017**; Steel, 2016; Van der Merve and Maree, 2016) providing a setting in which the story of the coffee is conveyed and the barista demonstrates technical and artistic skills in making drinks. Growth in speciality coffee has corresponded with the certification of barista training² and the establishment of the World Barista Championships (Pilgrim, 2016). As coffee has decommo­ditised, so the contribution of the barista has become professionalised (Manzo, 2014; Monk and Ryding, 2007). The coffee shop is a differentiated proposition in terms of product variability, the **nature** of complementary space (Jensen et al., 2012) and, potentially, the independent status of the coffee shop. **Speciality coffee is also influencing the**

² Certified by SCAA (Speciality Coffee Association of America) and SCAE (Speciality Coffee Association of Europe)

competitive dynamics within second wave businesses (Bryant and Sisal, 2016). The large coffee shop multiples mimic speciality coffee in offering varied roasts, extensions to coffee menus and new brew methods in selected locations. However, while the in-store menu may reflect third wave, supply practices are discernibly different. In the third wave, the values associated with quality through origin, variability, and ways of doing business contribute to differentiation. An important part of the values added proposition is the approach to sourcing and supply.

The supply of speciality coffee

Speciality coffee shops are maintained by intricate networks of **suppliers**. In the first instance, product flavours are determined by the grade of the coffee, the bean variety (Hoffman, 2014) and the ecology of the growing location. Despite the market dominance of national and international coffee shop businesses (the vanguard of the second wave), cultivation is still fragmented with 70% of the global coffee harvest produced by over 25 million smallholders (Brits, 2016). Speciality coffee typically sources high grade, single origin coffee, around 6% of total coffee output (Steel, 2016). In terms of supply chain dynamics there has been a concerted effort to improve links between producers, wholesalers, roasters and retailers (Bowman, 2016) in the pursuit of: sustainable supply (Karjalainen and Moxham, 2013), the fairer distribution of wealth (Wheeler, 2016) and product differentiation. The strategic challenge for speciality coffee is one of achieving scale; sharing the benefits and retaining the capacity for differentiation, **reconciling shared values concerning sustainability and fairness with economic interests. Coffee related supply chains, value chains and global value chains emphasise the physical journey of coffee, via inter-organisational transactions (Donnet et al., 2010; Johannessen and Wilhite, 2010; Ortiz-Miranda**

and Moragues-Faus 2015; Ponte, 2002; Ponte and Sturgeon, 2014). However, concepts and discussions reveal little of values transfer and their impact on cohesion in the supply system.

Carvalho et al. (2016) acknowledge that speciality coffee is niche, reflected in a value system that prioritises quality retention over efficiency. Close links that support information flows and knowledge transfer are conducive to enhancing product quality. However, environmental change and financial uncertainties in coffee supply have impacted on sustainability (Karjalainen and Moxham, 2013; Ponte and Gibbon, 2005; Whittaker, 2006), so producer welfare will continue to influence the future development of the industry (Brits 2016; Ortiz-Miranda and Moragues-Faus, 2015) and scope for differentiation. Farmers are ultimately dependent on local conditions, including: the ability to access micro finance (Jena et al., 2012), the opportunity to pursue value adding processing operations and finding alternative routes to market. The less coffee processing performed by farmers, the lower the potential financial yield (Wheeler, 2016) and so the sustainability of the industry is challenged. Speciality coffee attempts to reconcile supply chain imbalance by integrating the name and location of the cultivator into product branding and packaging, thus raising the contribution of the farmer at the final point of sale. The roaster is important in building links between retailers and cultivators (Bowman, 2016) as well as influencing differentiation in terms of taste and the story of taste. The roaster must translate the terroir of coffee into appealing tastes. Speciality coffee is associated with a lighter roast that releases more subtle flavours (Meikle-Janney, 2016; Steel, 2016), which impacts on grinding and brew methods in coffee shops. Supply chain and coffee shop

operations must adjust to the varied terroir of the sourced coffee and communicate this to the consumer. The barista is the last link in the chain and responsible for managing expectations in terms of product and place, through knowledge transfer with customers (Manzo, 2010). They represent the product and service front line as “curator of coffee” (Newall, 2016: p247) and custodian of the coffee machine (Manzo, 2014). They must have both technical competencies and social abilities to ensure a memorable and positive service experience (Bharwani and Jauhari, 2013).

There is a collective interest – across speciality coffee - to engage with shared values, but their transfer and representation is complex. For some parts of the sector there is simply limited data on how businesses operate (Jena et al., 2012), equally the interpretation of values manifests in different practices depending on the function of the business. For example, values associated with ‘shared prosperity’ are reflected in the supply system in terms of agendas and policies that support shared economic rewards (Johannessen and Wilhite, 2010; Kolk, 2013).

Within the context of coffee shops, shared prosperity may refer to supporting local food producers and the marketing of ethical products (Murphy and Jenner-Leuthart, 2011). A shared value contributes to different agendas, behaviours and outcomes in different parts of the sector, but it also brings coherence and creates commitments between businesses and customers. It is argued that speciality coffee is more akin to a movement, in which practices reflect a collective philosophy and outlook (Manzo, 2010). Values added underpin both product and service differentiation, but this can look and feel different across the sector. The management of shared values therefore requires a ‘new way of seeing’ the context.

Due to the incompatibility between the metaphor of the ‘chain’ (that is typically used to explain value added) and the need to understand the relationship between shared values and differentiation, a less restrictive lens is sought. From a transactional perspective, differentiation is concerned with the timely and sustainable flow of quality coffee beans, from cultivator to consumer. From an intangible perspective, the story of the beans, the link between origin and taste and the corresponding ethics of farmer welfare and sustainability must also journey to the customer.

Breaking the chain – reconceptualising speciality coffee

Values are abstract and fluid and their evidencing is complex. In common with nomadic cultures, speciality coffee **can be seen as a values system**, a ‘way of life’ that cannot be easily deconstructed into the specified inputs, operations and outputs that are conversant with a single perspective of **quality**. **In the speciality coffee context, businesses and consumers must find ways to reconcile values and quality. The strategy of a coffee shop may reflect social and ethical intent as well as the need to make money.**

Rather like the playful customer, the business owner may be in speciality coffee to be part of something novel, to be involved in a movement and to pursue intrinsic rewards as well as profits. The embedded nature of values means **that** they are rarely acknowledged and managed **in terms of resourcing differentiation**. Despite **being pervasive**, shared values are not easily surfaced or mapped.

Many find the concept of values too intangible, and as a result, fail even to articulate a meaningful set of values, never mind translate them into reality (Thornbury, 2003, p. 70)

The previous **discussion demonstrates** that values are not organisation specific; rather they journey through supply and into coffee spaces **as collective ways of doing things**. In terms of artefacts and symbols (such as drinks, labelling, packaging and menus), the manifestation of values can be in plain sight (Darwin et al., 2002) and aspects of coffee sociality can be observed; however, interpretation of **shared** values is less obvious; furthermore, the link between values and organisational performance remains unclear (Pinho et al., 2014). The analytical challenge is one of **identifying** values and **tracing their** transfer and impact across the sector. In relation to speciality coffee, the questions are: what are the shared values, how are they transferred and what is their impact on differentiation? **These questions require a new way of seeing. Speciality coffee traverses time, through successive waves of product development, and space in terms of distance, maintaining strong relationships that go beyond resource transfer. Songlines are proposed as a metaphorical map and guide for understanding shared values across this sector.**

Songlines as a means to understanding ‘values added’

Songlines are an expression of ‘being’ in Aboriginal culture. They refer to a labyrinth of tracks that lead and intersect across terrain; reflecting a way of life – in terms of how to journey - and a way ‘to life’ **and finding resources**. From the dreamtime of their creation, songlines bind together places and routes, in song and story (Chatwin, 1986, cited by Judge, 1998). The only boundary to this values system is the edge of knowledge – where shared memory of place ceases. Songlines are both the map and the means to make sense of the map. **They encompass philosophy and perspectives on creation, explanations of ecology, astronomy (Norris and Harney, 2013) and, in practical terms, provide routes to resources; understanding songlines enables**

journey. They are exchanged primarily through song, story and visual image (Cameron, 2015); however, there is no universal representation or language of song, and therefore a single definition cannot be imposed. Songlines are a multi-faceted **and multi-lingual** guide with no immediate means of verification other than a shared sense of knowing and the collective ability to act in a meaningful way.

In common with the Inuit pan arctic network of routes, songlines are conversant with nomadic life (Aporto, 2009). **They reflect an association between traveller and context; each journey an articulation of people and places over time (Konig et al., 2010). The association with speciality coffee can be seen in terms of a values system connected to, and informed by, context (in contrast, value chain representations are abstracted from their environment). The application of songlines can therefore help to inform ‘values added’ and the differentiation of products, places and experiences.** Their association with journey is conversant with the increasing importance of coffee origin and the changing nature of coffee spaces. Speciality coffee does not have a definitive form but there are strong associations in the way organisations do business. Operating without specific definitions for product and place, speciality coffee can be expressed and interpreted by businesses and customers, so that meaningful exchange can occur. **A sense of playfulness pervades consumer and business behaviours. Novelty seeking consumers may engage in coffee shop dialogue, thereby deepening their involvement in how the sector develops. Coffee festivals and independent coffee guides extend the coffee culture (Ferreira, 2017) and the sharing of values. Speciality coffee is also a place for independence in collective space.** Quality is synonymous with variability; drinks are consumed in **places that accommodate purposeful and playful behaviours and coffee shops allow**

customers to create a sense of private space within a public place. Within this sector, there is room for variation and multiple interpretations; the standardised brandscape of the second wave has been superseded by products that taste different, served in places that feel different, **by design**. Songlines also combine a myriad of expression to convey detailed and multi-layered knowledge of place. Attention to detail is required for understanding where resources are located, what exchanges lay ahead and how to journey through. For speciality coffee to grow, new businesses and consumers must be guided to make the transition and build attachments within the context. They must be able to make sense of the detailed expressions of quality. In terms of guidance, songlines impart ecology, helping the traveller **understand their** environment.

Reflections on songlines and speciality coffee through shared values

Collectively businesses are developing and evolving the sector in collaboration with consumers. In taking a playful approach to theorising, a stronger sense of alignment emerges between speciality coffee and songlines. Reflecting on the literature reviewed, Table 1. presents shared values identified through songlines and proposes opportunities for further exploration.

Shared values categories: songlines and speciality coffee	Opportunities for exploration
Harmony with ecology	The importance of terroir in relation to taste and story of taste; sustainability in the supply chain.
Prosperity through journey	Communication; information transfer; guidance for producers and consumers; journey as a means of learning and experiencing differentiation in coffee spaces.
Independence and integration, for mutual benefit	Sharing and interpreting the story of coffee; business integration and relationship building; loyalty and sustainable relationships; coffee sociality.

Attention to detail	Interpretations of quality; coffee shop location and context; product and place variability; place attachment; sensory experiences.
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Table 1. Shared values categories in speciality coffee.

Each shared value is discussed through the alignment and application of songlines with a view to raising issues in differentiation.

Value: Harmony with ecology

Speciality coffee is concerned with access to - and creating the capacity for – single origin coffee products. Bean variety and terroir determine the nature of the coffee product, in terms of grade and potential as speciality (Steel, 2016). Supply **systems** reconfigure to access different **bean varieties and growing locations**. As coffee sourcing shifts from region to region, so the tastes vary. The coffee shop customer experiences the impact of nomadic supply that moves to and from different producers. In association with songlines, coffee is a product of the environment, the ecology of which will have an impact on taste and story; it is embedded in the product and in the human system that interacts to produce, **process and brew the coffee**. **With reference to songlines, Rose (2014) notes that to understand ecology is to be able to conceptualise the interrelationships between constituent natural elements.**

Knowledge of how living things fit is not just a body of information, and it is a system of action, interaction and connection (Rose, 2008 cited by Rose, 2014, p. 432)

The third wave of coffee accentuates the association between coffee origin and the welfare of farmers. It is a movement defined by small scale producers and supportive supply relationships (Hoffman, 2014). There is a shifting balance of power towards the producer, as the commercial success of speciality coffee lies with the sustainable cultivation of high grade coffee. Depending on the dispersal of supply related information, these changes might also be driven by customers who seek fairness and

fair products (Ponte and Gibbon, 2005). Values concerning shared prosperity are not only redefining supply, they inform marketing within the coffee shop (Murphy and Jenner-Leuthart, 2011). Ecology informs differentiation **throughout the value system and product origin information has become ever more detailed.**

While second wave coffee may mention the country of origin, third wave coffee always provides the country of origin and sometimes even the specific farm where the coffee was grown (Bryant and Sisel, 2016, p. 1)

In songlines, knowledge of ecology is sung into existence and passed through generations (Judge, 1998; **Norris and Harney, 2013**). Songlines are “**everywhen**” **expressing how terrain was created and formed (Clarke, 2009) as well as guiding journey through. In speciality coffee, the embedding of the past and present is important to the sustainability debate, as it provides the means to understanding changes in terroir. Songlines are a construction of memory and express cycles of creation in the natural world (Konig et al., 2010; Rose, 2014). Speciality coffee depends on a responsive supply system that will adjust to ecological and economic challenges. It is a sector undergoing creation and evolution. There is an interest in understanding which aspects of ecology are shared and understood across the sector and the extent to which this knowledge informs product and service differentiation.**

Value: Prosperity through journey

Songlines provide the means to independent travel. Their navigation requires negotiation with different groups or clans; **where** journeys intersect **there are** opportunities to share songs and build relationships. Growth in **speciality coffee** is driven by **new organisations and customers joining and integrating into** the values

system. There is no definitive model of what speciality coffee or the third wave should be, or where coffee shops and spaces should be located. The agenda for new entrants is to learn the values system and locate within it. Speciality coffee contains map and guide for producer, barista and consumer **but the multitude of independent businesses creates the space for interpretation and variation in products and experiences.**

It's not really written down anywhere but it definitely exists. It tells the would be speciality coffee shop owner which machines to buy and what kinds of drinks to make. It tells them they should be drawing pictures in the milk...and it helps them to decide what size cups to buy... (Newall, 2016, p.247)

From a market perspective, speciality coffee must **entice customers to journey** from second to third wave. The publication of regional coffee guides and the growing number of **coffee events help** consumers to locate speciality coffee **and embark on their journey** through. Historically, coffee has been seen as an enabler to sociability and dialogue (Hoffman, 2014; Lyons, 2005; Manzo, 2010). The location of coffee places and the **design of space influence the convergence of purposeful and playful behaviours. Speciality coffee offers customers and businesses the opportunity to be involved in a movement; the different spaces and places allowing individuals to engage with the product and redefine their concept 'of self'.** Songlines are not concerned with territories per se but movement through; ways to meet others and then leave and return. Speciality coffee leads consumers and producers to access and **appreciate new interpretations of: quality, organisational form and coffee shop sociality.** As a context it must consider invitation, permission and restriction (Kern, 2016) **and determine the definitive features of speciality coffee and the impact on sector growth.**

Through the oral transfer of instruction, songlines become a collective memory bank (Judge, 1998). The sharing of songlines is, therefore, a considered act of legacy. Journey - and the will to journey - can be driven by **curiosity and a playful search for social connections**. Customer journey **within speciality coffee** may reflect adventures in sociality, finding the context that meets their social intent, be it work or pleasure (Bookman, 2014; Shiau, 2016). Coffee shop excursions can be driven by a desire to build relationships **and to be involved. They may be playful, an exercise in “go see”, to satisfy curiosity, to derive sensory enjoyment and to learn more and derive intrinsic benefits (Van Vleet and Feeney, 2015). Customer journey** may reflect ‘walkabout’ (Taylor et al., 2014). The search for knowing is **mirrored in businesses when representatives** journey through supply networks to **enhance knowledge and engage in** relationship building. **The implication is that** values are learned and shared through journeying, both in a **physical sense** and through the stories transferred in the sociality of the coffee shop.

Value: Independence and integration, for mutual benefit

For nomadic life to prevail songlines must be shared and interpreted. In their exchange, the tone of the song is as meaningful as the sites and features expressed. The listener must be able to make sense of song. Songlines allow knowledge to be transferred with the potential to raise the capacity for survival and journey, **therefore** understanding is a vital component of this transfer. Speciality coffee is characterised by collaboration between independent businesses. But connections - and the pattern of relationship development - may not appear systematic. In their discussion of supply dynamics, Carvalho et al. (2016) distinguish between independent coffee businesses that occupy one place within the value system and vertically integrated businesses (such as

combined roasters and coffee shops), arguing that the premium nature of speciality coffee is enhanced through closer integration. Quality derives from collaboration and knowledge sharing. Songlines intersect at sites or locations of exchange. A successful convergence at a site may not be defined by resource gain, but by the ability to move on and through. What a relationship could be is reimaged through the exchange (Chatwin, 1986; Judge, 1998); each interaction fuels the conceptualisation of more. In the context of speciality coffee, the drive for sustainability and the agenda for mutual benefit has facilitated stronger relationships and policy development (Golding and Peattie, 2005), which in turn provide the basis for ‘more’ in terms of collaborative supply (Karjalainen and Moxham, 2013; Valkila et al., 2010). In time, more value adding activity may take place at the point of coffee origin (Bryant and Sisel, 2016; Wheeler, 2016). **Understanding the speciality coffee context involves exploration of the relationship between values, value transfer and relationship building. As Hammervoll (2009) notes, relationships develop over time, enabling both tangible and intangible contributions to differentiation.**

Value: Attention to detail

The aesthetic of a culture is expressed through song. In songlines, repetition and tone are important to understanding (Judge, 1998). The coffee shop is also an accumulation of ‘attention to detail’ in terms of location (Lyons, 2005), ambience, product, service (Chen and Hu, 2010; Monk and Ryding, 2007) and social dynamics (Bookman, 2014; Van der Merve and Maree, 2016; Manzo, 2014). The coffee drinking experience – in terms of space and sense of place - is crucial to how consumers construct and refer to positive memories and form place attachment (Tumanan and Lansangan, 2012).

Interactions between staff and customers, and from customer to customer, differentiate

the experience (**Lobo, 2016; Manzo, 2014**) **and place**. Service differentiation is typically recalled in emotional and sensory terms (**Nadiri and Gunay, 2013**) in relation to a complex mix of product and place related variables (Kauppinen-Räsänen et al., 2013). Unlike the second wave, there is no specific blueprint for the coffee shop environment. While the coffee machine is the constant (Manzo, 2014) and latte art the expression of barista skills, coffee shops can look different. **They may be mixed use venues or dedicated to coffee; cluttered or stripped back in appearance; offering relaxed seating or short stay espresso bar. Customers look to menus, espresso machines and the sociality** within the shop to determine ‘where’ they are.

Differences in coffee taste and experience becomes a shared reality when talked about (Manzo, 2010). Values added may be a direct product of the social milieu that convenes within coffee shops, with or without direct service intervention, **furthermore** social media may be an important part of the collective memory of experiences. As product quality is defined by variability so the third wave coffee shop represents somewhere different (Pilgrim, 2016). It is the association with variability that makes the servicescape of speciality coffee unique and a distinct challenge in terms of research **and business development. The numerous variables that contribute to ambience and sociality require detailed consideration as** their contribution to differentiation is complex. **The challenge is to understand the relationship between values added, the influence of the wider speciality context and the culture and values of specific businesses and how these influence differentiation.**

Towards a conceptual framework for ‘values added’

In seeking better alignment between the theory and practice of values added and differentiation, theoretical development must respond to the limitations of value adding concepts. Firstly, research within speciality coffee should extend through the value system, in recognition that differentiation is a context wide agenda from producer and supplier organisations to the coffee shop and the sociability of customers. Secondly, emphasis should be given to the intangible, sensory and emotional aspects of differentiation. A values added debate must go beyond structural references and consider the relationship between the tangible outputs of the system and the intangible values that are embedded in actions, interactions and artefacts. A playful approach to theorising directs attention towards intrinsic motivation and the benefits of involvement that influence customer and business behaviours. Songlines inform: the conceptualisation of shared values, how they are transferred and their impact on differentiation. Although the navigation of songlines is not well documented (Norris and Harney, 2013), there is an association with networks (Judge, 1988). Mapping networks can help to explain complex relationships, connections and, therefore, a multitude of playful and purposeful journey possibilities. The fluidity of songlines and the notion of ‘everywhen’ (that songlines express the story of their creation) link to the idea that networks emerge and develop over time, alluding to changes in strategies and behaviours. Speciality coffee emerged from the second wave; it is a product of different supply and customer relationships and a reconfiguration of coffee places. A longitudinal understanding of values and their transfer would inform how the emergence of the third wave has been enabled through differentiation.

Based on these preliminary insights, a conceptual framework for values added is proposed (see Fig. 1) as a means to further investigating differentiation in speciality coffee. It combines the four categories of shared values discussed and **their perceived impact on** differentiation.

Figure 1. A conceptual framework for values added in speciality coffee.

(Insert Figure 1.)

Retaining a context wide approach to analysis, shared values are intangible but **thought to** impact on differentiation in terms of: coffee products, the processes that support their creation; place (**in relation to** coffee origin and the nature of coffee shops) and finally, people, in terms of businesses and customers and coffee sociality. Given the variable nature of **coffee and aesthetics of coffee shops**, the intention is to use the conceptual model to generate case studies of customer and business journeys over time. **The adoption of a playful approach to theorising creates the opportunity for comparison and explanation in case variation. Thinking in a playful manner supports a desire to shift value adding conceptualisation away from existing theories and towards a metaphorical association that will allow for depth and breadth in reasoning. Based on the literature reviewed, the assumption is that the third wave presents unique product and place differentiation which in turn influences the purpose and playfulness of organisations and consumers (Manzo, 2010; Ferreira, 2017). The intention is to understand shared values across the sector, from producer to customer, looking for commonality and connection beyond organisational boundaries. From this an understanding of the sustainability and development of third wave can be informed. Reflecting the emergence of the third wave, values transfer should be traced over time. The implication is that**

qualitative enquiry must follow the subjects (both businesses and consumers) in contrast to instrumental case study (Stake, 1998) that prioritises the modification of existing theory. Both ethnomethodological and analytical autoethnographic approaches are proposed (Anderson, 2006; Holstein and Gubrium, 1998; Morse, 1998), in order to appreciate the social facts and conventions that underlie speciality coffee as well as **understanding playful behaviours and hedonic outcomes of engagement (Muhkerjee and Lau-Gesk, 2016; Van Vleet and Feeney, 2015).**

Conclusions, implications and limitations

This paper has shown that ‘values added’ inform differentiation strategies across the speciality coffee sector. **The discussion has argued for a disassociation from the dominant value chain metaphor as a means of understanding differentiation. Songlines have aided the appreciation of variability and multiple interpretations of speciality coffee and enabled reasoning to go beyond an economic rationale.** A conceptual framework has been developed with a view to aiding the investigation of values added, values **transfer and impact on differentiation.** The proposed categories of shared values **provide an initial** map and guide for research and context understanding, **from the origin of coffee to the social milieu within coffee shops. It has been argued that existing theories should not limit our ability to engage with a business context. Playfulness is both a theme for observation in speciality coffee and a mindset of the observer who seeks to understand values. Playful thinking provides an opportunity for non-conformity and to start again in theorising for differentiation.**

Governance systems can be challenged by societies and groups that do not conform. Nomadic cultures are increasingly rare, unable to prosper within modern 'territorial' political systems, but they can endure, providing there is access to - and an understanding of - how to work with ecology. Speciality coffee is differentiated from the second wave in its relationship with coffee origin and ecology. It rejects the convention of standardised product quality. It is bound by variable product quality, intricate supply arrangements and the predominance of small and independent businesses that seek to be different. This study has developed a conceptual frame for understanding values added **and their contribution to differentiation. However, it should be noted that values may constrain and restrict the scope of strategy, imposing a set of conventions that could prevent options from being explored.** There is limited scale to many third wave businesses, from supply to coffee shops; this may be through choice, necessity or competency – values related to independence may override the intent to grow the business. **The third wave of coffee continues to emerge, sung into existence by new entrants. Growth in the sector and in the scale of individual businesses will create dilemmas in adhering to, and prioritising, values.** For example, there may be a shared agenda to grow speciality coffee sector for mutual benefit, however, businesses must work together to protect resources and ecology, to guard against exploitation. **There may be points of tension over the prioritisation of values, as the interests of customers and suppliers converge within the sociality of coffee shops and in the dialogue between business and consumer. Both have a part to play in differentiation.**

Speciality coffee needs to make the journey, through cohesive and informed relationships, to ensure that differentiation translates into the detail of coffee products

and sensory experiences in coffee places. **For theorising to make a contribution to a 'values added' debate there needs to be better alignment between the expressive capacity of the theory and the characteristics of context. A first step in establishing this purpose has been to adopt a playful approach to exploring values added in the speciality coffee context.**

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