Jumuiko la Maliasili Tanzania

Tanzania Natural Resource Forum

"Amplifying synergies for Landrights CSOs"

The State of Land-Based Investments in Tanzania:

A Situational Analysis Report

Report prepared for Tanzania Natural Resource Forum | By Emmanuel Sulle

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Contents

Acronyms and Abbreviations

AU	African Union
BOT	Bank of Tanzania
CAADP	Comprehensive Africa Agriculture Development Programme
CSO	Civil Society Organisation
ESRF	Economic and Social Research Foundation
FAO	United Nations Food and Agriculture Organisation
GOT	Government of Tanzania
LBI-WG	Land-based Investment Working Group
LEAT	Lawyers' Environment Action Team
MNRT	Ministry of Natural Resources and Tourism
MVIWATA	MuunganowaVikundivyaWakulima Tanzania
NARCO	National Ranching Company
SAGCOT	Southern Agriculture Growth Corridor of Tanzania
TBS	Tanzania Bureau of Standards
TIC	Tanzania Investment Centre
TRA	Tanzania Revenue Authority
URT	United Republic of Tanzania

1.0 Introduction

From mid-2000s Tanzania experienced a significant interest in land-based investments, with foreign investors leasing chunks of land for agriculture, tourism and forest plantations (Kamanga 2008; Locher and Sulle 2013; Sulle 2016). To date, few land-based investments have generated significant incomes for rural communities while others are disputed. While land-based investment is needed to achieve development goals such as poverty alleviation, industrialization, food security and improved nutrition, an investment that wrongfully displaces rural people and turn them into low-wage or temporary labourers does not meet such goals. Instead, it may create harm to local people and communities and it may prove difficult to implement beneficial partnerships between communities and investors when legitimate right holders are displaced.

This report provides a situational analysis of the current land issues in Tanzania. It does this by assessing the impacts of land-based investments in the country with specific focus on investments located within and outside the Southern Agriculture Growth Corridor of Tanzania. It gives an overview of the current state with regards to land deals in the country, the existing and planned business models and highlights the existing limitations on data and knowledge about these deals. It focuses on the forms and the impacts of existing land-based investment projects on affected populations, with a specific focus on policy, legal and institutional framework governing large-scale land-based investment. The study thus draws insights from five districts of Mainland Tanzania. The review identifies several land-based investments models to monitor in investment areas, provides recommendations and strategic direction for the work of Land-Based Investment Working Group (LBI-WG).

LBI-WG formed by NGOs working on land matters was established in March 2016 and endorsed by a group of NGOs which have joined the National Engagement Strategy (NES). NES establishment is supported by the International Land Coalition (ILC) which promotes People Centred Land Governance (PCLG) to enhance transformation in land governance at a country level. The NES approach works towards two main outcomes: a) setting-up of a multi-stakeholder platform on land governance for policy dialogue and knowledge sharing; and b) a country strategy for engagement on land governance. In Tanzania, NES has three key components which include: (a) coordination, communication, advocacy and policy dialogue implemented by Tanzania Land Alliance (TALA); (b) the land-based investments component coordinated by the Tanzania Natural Resource Forum (TNRF); and (c) rangelands component coordinated by the International Livestock Research Institute (ILRI), the Ministry of Agriculture, Livestock and Fisheries (MALF) and the Parakuyo Indigenous Community Development Organisation (PAICODEO).

Studying, evaluating, monitoring and auditing land-based investments is critical, because such investments still pose a significant threat to local people, especially when they are carried out without local people's full participation and consent. Since 2009, large-scale land acquisition has been at the heart of the Government of Tanzania's (GOT) transformation agenda, which aims at "modernizing" and transforming the agriculture sector through the increased participation of the private sector. To date, the

GOT, development partners and private sector have pointed to the potential for "win-win" outcomes provided by beneficial partnerships in land-based investments that incorporate local small producers. Yet, there is limited information and specific strategies as to how such beneficial partnerships between agribusinesses and small producers might work. CSOs, as one of the oversight institutions, have always played a key role in providing policy makers and the government with key information about pressing issues on land matters. Indeed, it was the work of CSOs such as Hakiardhi which prompted the government to issue moratorium on further allocation of large-scale land acquisition, dubbed 'land grabs', for biofuels projects in 2008. Since then, other organisations such as TNRF, Oxfam, Care International, LEAT, MVIWATA have produced influential reports and have convened various national dialogues to debate and discuss land-based investments. This report aims to go beyond these debates by proposing further activities such as assessing, monitoring and auditing land-based investments in the Tanzania.

The rest of this report is structured as follows: section two sets out the key objectives of this assignment and the employed methodology. Section three provides a broad overview of forms and models of land-based investments in Tanzania. This is followed by section four which details research findings from five districts. The fifth section discusses overarching issues in land-based investments. The report ends with conclusions and recommendations which put forward several options for CSOs in Tanzania to shape land-based investments for the benefits of the majority of poor rural men and women.

2.0 Objectives, methodology and scope of work

2.1 Objectives

The main objective of this study is to:

- Produce a report detailing the situational analysis of the impacts of land-based investments within and outside SAGCOT.

The specific objectives of the study are to:

- Identify existing and planned agricultural and pastoralist investment models available in the country;
- Document current issues and opportunities related to land investments and power relation between the investors, government and the people surrounding the investments that LBI working group members may engage with;
- Identify key linkages and impact of large-scale commercial investment on land rights in the investment areas and identify the necessary interventions and point of entry for LBI working group members;
- Highlight issues related to social differentiation as a result of land investments in the study area, identifying who are the winners and losers, unpacking gendered aspects of differentiation and power relations in general; and
- Identify several land-based investment models to monitor in investment areas.

2.2 Methodology and scope of work

Evidence for the study was gathered through a case study approach, combining qualitative methods (document reviews, focus groups and key informant interviews) with quantitative analysis of data obtained from primary and secondary sources, such as previous and ongoing studies by consultants in the country. The study also drew as much information as possible from key informants from various organizations working on land rights and tenure security in the country, local government authorities and government agencies.

2.2.1 Document Reviews

The consultant conducted a literature review by gathering (1) secondary data from high quality peer reviewed journals and books, (2) recent and up to date grey reports and studies obtained from various research institutions and land rights organizations and (3) web-based databases and any other existing research reports on the subject in question. For relevance and accuracy reasons, literature based on the Tanzanian context was prioritized. In addition, relevant government policies, development plans, strategies and legal documents that provide for both men and the women's land rights and security were analysed. Through the literature review, the researcher was able to identify the existing gaps in the implementation of land-based investment models and programmes in the realisation of the study in question.

2.2.3 Key informant interviews

The aim of this situational analysis report is to develop a highly-nuanced understanding of the current state and impacts of land-based investments in Tanzania, particularly within and outside the SAGCOT region. In this regard, the researcher contacted leading practitioners, scholars and activists in the areas of land rights and land-based investments. Specifically, the list of the key informants was drawn from communities, private sector, research institutions, civil society organizations and government ministries (particularly ministries of agriculture, land, livestock and industries).

2.2.4 Participant observation

Although this is mainly desk-based review, the consultant was able to use some of his previous experiences and information in regard to selected districts to update potential socio-economic impacts caused by land-based investments implemented in those selected districts.

2.2.5 Case study approach

This study adopted a case study approach to collect data and necessary information to meet the objectives set out in the TOR. Evidence was gathered from five distinct districts (Ngorongoro, Kilombero, Kilwa, Kilolo and Mvomero) provided an opportunity to observe and follow the unfolding events within the grassroots community, the village government, and the village assembly and to connect these activities to actions and events at higher levels (ward, district and the nation). Throughout the research period, the information was triangulated to mitigate the limitation of case study approach to ensure that generalized conclusions (Yin, 2004) are accurate.

3.0 Land-based investments in Tanzania: Forms, business modelsand impacts

3.1 Forms of land-based investments

Land-based investments can take different forms and each form has different impacts to local communities and the country. The most common form of land-based investments involves mostly companiesand or few individuals acquiring land rights through long-term leases or concessions. Another form of land-based investment involves a variety of arrangements with small-scale producers (Vermeulen and Cotula 2010). In Tanzania, although, the second form of land-based investments is practiced in different parts of the country (e.g. among cotton and tobacco growers), the large-scale acquisition of land rights is championed through various initiatives including SAGCOT. However, since the large-scale landacquisitions have displaced and continue to displace most of the rural poor in different parts of Africa, this form of investment remains contested.

In Tanzania (and many other African countries) foreign direct investments in agriculture and other sectors is promoted by investment promotion centres that play a key role in ensuring that countries compete to attract investors. In the process of attracting investors, the last two governments of Tanzania have adopted several policy and legislative measures to ensure the country remains an attractive destination for foreign direct investments (FDIs). Yet, these investment promotion centres – the Tanzania Investments Center (TIC) and SAGCOT Center – remain largely understaffed. Tanzania currentlyhas a gross lack of transparent and up-to-date information on land-based investments; it is also unclear which agency collects, monitors and updates information on land-based investments. When consulted about this problemin 2013, for instance, officials of the Tanzania Investment Center (TIC) complained that staff shortages limit their ability to update the status of registered companies (Sulle 2013). It is likely that this situation has not changed much because recruitmentremains the same or, has perhaps, worsened in recent years because of ongoing re-evaluation of civil servants' certificates which led to the termination of the contracts of nearly 10,000 employees in various government's departments (The Citizen 2017). In order to understand better various forms of land-based investments, the report now discusses fivetypes of main economic activities which are land based investments in Tanzania.

3.1.1 Agriculture

Agriculture remains the key economic activity in Tanzania, employing over 65.5% of the workforce (URT 2016), and directly contributing to the livelihoods of more than 80% of the population (Hella et al 2014). Although its contribution to the overall gross domestic product declined, while many other sectors such as services (tourism) and financial sectors grew rapidly, agriculture will remain the most reliable sector for many years to come. For instance, in 2016, the agricultural sector accounted for 29.1% of the GDP compared to its previous year's contribution of 29.0% (URT 2016).

The agricultural sector's growth is driven by the smallholder farmers who contribute more than 90% of total production in the country (Yvonne et al. 2014). Despite a hostile policy environment, smallholders have remained resilient and absorbed shocks following on from the disastrous implementation of Structural Adjustment Programmes that rolled back state provision of inputs and extension services. Policy reforms carried out from early 2000s such as the Comprehensive Africa Agriculture Development Programme (CAADP) have improved conditions for African farmers, including Tanzania's farmers. The core reforms include reducing heavy taxes on agricultural produce, and encouraging private investments and innovations (Wiggins and Keats 2014). Despite the promising policy reforms in the sector, small producers still face political, social and environmental challenges as highlighted below.

Inadequate political will to fully support agriculture

Despite recent progress in formulating strategies, initiatives, and programs to transform Tanzania's agricultural sector, there is inadequate political will to fully implement these initiatives. For instance, the government failed to meet the 10% budget allocation to its agricultural sector as required by the 2010 CAADP compact.

Poor public investments in agricultural sector

Many scholars agree that public and private investments are critical to agricultural growth (Wiggins and Keats 2014; Cooksey 2013) However, there is clear distinction between investments carried out by the public sector in public interest, and those carried out by the private sector trying to accrue private benefits (López 2004). In Tanzania, as in many other developing countries, the agricultural sector is characterized by inadequate public investments in research and development (R&D), low use of agricultural technology, lack of financial resources for farmers, poor infrastructure (markets, roads and irrigation), limited skilled human resources, widespread corruption, lack of effective agricultural infrastructure, and ineffective extension services (Sanghvi et al. 2011). Such problems are mainly due to an inadequate budget being allocated to the agricultural sector and the lack of a political will to design and implement policies which are not only pro-poor, but effectively empower the country's small-scale producers. For instance, for the last decade, Tanzania's agricultural sector growth rate has remained low – between 4.0% and 5.2% since 2000 (slightly above the African growth of 3.9%) (Yvonne et al 2014). In 2016, the agricultural sector's growth crashed with only a 2.1% growth rate (URT 2017a). Nonetheless, in 2017, the Agriculture Minister's budget speech indicated that food production increased from 6.6 to 6.7 million tons, leaving the country with a surplus of 3 million tons (URT 2017a). This increased food production was however not due to improved crop yield; instead food production resulted from an increase in land used for agricultural production (Yvonne et al 2014). In the same period under review, the number of livestock in the country also continued to increase, but production has not become more efficient and new breeds have not been introduced (Yvonne et al 2014: 7).

Lack of reliable markets for agricultural produce

Small-scale farmers in Tanzania receive low prices for their produce because of a lack of reliable markets and frequent exploitation by the middlemen. The former UN Rights to Food Rapporteur (De Schutter) argues for the need to reduce the role of intermediaries to ensure commodity/food prices are fair for farmers and affordable for consumers (De Schutter 2011 cited in Twomey et al. 2015: 23). In this regard, emulating and supporting the efforts of farmer organizations such as MVIWATA to establish farmers' markets in different parts of the country is important (Interview, July 2017).

Given the increasing demand for quality agricultural produce, Tanzanian farmers have huge potential to register significant earnings from the sector. For instance, according to the Bank of Tanzania's Monthly Economic Review, for the year ending May 2017, the value of traditionally exported agricultural produced increased by 11.7% to US$851.4 million. The sector's performance is linked to improved cashew nuts exports which nearly doubled to US$340.9 million in 2017 from US$186.3 million in May 2016 (BOT 2017: 7; see Table 1 above). Cashew nuts are mainly produced by small-scale farmers along the expansive Tanzanian southern and coastal regions.

3.1.2 Pastoralism

For the purposes of this study, pastoralism is defined as a holistic livelihood option which includes pastoralists' culture, identity, and way of life (Mollel and Porokwa 2013). In Tanzania, pastoralism is the dominant livestock production system employed in the country's vast rangelands and elsewhere in the country. The International Livestock Research Institute established three categories of livestock production in the country: ranching, pastoralism (indigenous), and mixed pastoralism (agro-pastoralism) which account for about 4%, 16% and 80% respectively of the livestock production (cited in Mollel and Porokwa 2013: 101). Overall, Tanzania is the third largest producer of livestock in Africa, after Ethiopia and Sudan. Globally, Tanzania is the 11th largest producer with about 25 million cattle representing 1.67% of global cattle holdings.[1] Livestock are not only essential assets for livelihoods, but are key to alleviating poverty and a critical source of saving for rural households (Scoones and Wolmer 2006).

However, Tanzania's livestock sector is often viewed as underdeveloped, based on mobile livestock keeping which is generally considered backward and/or outdated. Based on this view, since independence, the Tanzanian government and some development partners have tried to implement various policies that aim to sedentarise, improve and replace the dominant customary livestock keeping system in the country. New development proposals within and outside SAGCOT make clear that the government aims to adopt modern approaches to livestock keeping, including ranching. For example, initial SAGCOT documents argue that "in order to improve productivity, quality and value addition, NARCO has decided to privatise key assets across its ranches", by offering land and assets to investors with the necessary technical skills "in exchange for minority equity stakes" (SAGCOT 2012a: 13). Such transactions will allow NARCO to receive dividends once the project is profitable. According to SAGCOT (2012a:3) livestock investment opportunities document, all transactions are because "growing middle-class and demand from tourists and international investors" have led to growth in Tanzania's top-end meat market, but because of "a lack of quality ranches, abattoirs and meat processors, virtually all quality meat needs to be imported".

[1] FAO 2013. World Cattle Inventory: Ranking of countries, accessed on 12 August 2017 at:http://www.cattlenetwork.com/world-cattle-inventory-ranking-countries-fao

SAGCOT's argument raises two key issues: (1) immediate need to meet the growing and quality meat, and (2) it is not acknowledged that ranches existed in Tanzania but failed to produce expected results. Therefore, stakeholders in the livestock sector and the general public need to ask if we have learnt from our past mistakes in this same sector, such that past mistakes are informing our current plans to revamp livestock sector? Previously, Tanzania's livestock sector has adopted several initiatives that aim to modernize and transform the pastoral communities. For example, a 1950s project called the 'Maasai Development Plan' (MDP) was a key pre-independence initiative geared towards developing mobile livestock-keeping to produce beef. The initiative banked on the idea that with the help of 'expert' advice and 'modern' technologies, the Maasai would be transformed into modern ranchers in demarcated areas. The project goals were to be achieved by constructing permanent water supplies, clearing bushes with tsetse flies, and providing pasture land and fodder production (Hodgson 2001). As part of the implementation strategy, Maasai communities were expected to (1) co-fund the project through taxes, (2) increase the supply of livestock sales to Tanganyika Packers' factories both in Arusha and Dar Es Salaam (Raikes 1981), and (3) transfer some of the Maasai's fertile land to farmers (both small-scale (African) and commercial (European). However, alienation from and controls on resource rich areas curtailed pastoralists' access to dry season grazing areas and widened their distrust in many intervention programmes (Hauf 2003).

These historical analyses are critical, and they need to inform any attempt to improve the livestock sector in Tanzania. A sensible policy decision must thus be informed by not only local politics, but also local context as highlighted above.

3.1.3 Conservation and tourism

Following major reforms carried in the wildlife sector in the late 1990s, among other things, the government of Tanzania opted for the decentralization of wildlife governance by establishing Wildlife Management Areas (WMAs), i.e. areas of village land set aside for wildlife conservation (Nelson and Agrawal 2008). WMAs are covered in Wildlife Policies of 1998 and 2007 and reinforced by the Wildlife Act of 2009 as amended in 2012. The pilot WMAs has been in place since the 1990s. As of March 2017, 38 WMAs are in different stages of development, with 22 WMAs occupying 30,623km^{2}which have been gazetted at different times (URT 2017b). In addition, 16 WMAs are in different stages of establishment, includingZiwa Natron, Mpimbwe, YaedaChini, Mchimalu, Ndonda, ISAWIMA naUbende (URT 2017b).

Although WMAs are the only official unit of conserved area within the village land(s), a number of villages next to conserved areas such as national parks have long established conservation and tourism initiatives in partnership with tour operators(see Nelson 2004; Nelson and Makko 2005; the case of Ngorongoro District below). Today, several tourism investments are being undertakenin communal lands such as camping sites, tented lodges and game drives. Investors often enter in to multi-year contractual arrangements to establish camps, lodges and other facilities on WMA and village land. As a result, in places where such arrangements are somewhat fair, WMAs and villages are earning significant income from concession fees.

But, as I further illustrate below, not all communities are benefitting from current arrangements and partnerships with tour operators because of governmentpolicy changes and conflicting interests between and among actors (Sulle and Banka 2017). For instance, a recent study, which included aerial surveys to count wildlife in WMAs, found large herds of wildlife and few carcasses of dead elephants in most WMAs located in the north, while in the south, there were many carcasses of dead elephants (PIMA 2015). The study concluded that unlike those in the southern part, the WMAs in the northern part of the country have significantly improved wildlife conservation and revenue generated for the WMAs' member villages (PIMA 2015). The discrepancy between the WMAs in the north and the south can be explained by the well-established tourism infrastructure in the northern circuit. This development is further linked to the presence of big tourism brands in the north such as the World HeritageSites, the Serengeti National Park, and Ngorongoro Conservation Area (Sulle and Banka 2017).

Benefit and cost sharing model among and between WMA actors

As part of the current policy, legal and institutional framework, especially Wildlife Conservation (Wildlife Management Areas) Regulations, 2012, all the revenue generated from the WMAs must be shared by fourentities: theWildlife Division (WD)/Tanzania Wildlife Protection Fund (TWPF), Treasury (TR), District Council (DC) and the WMA. The 2008 introduction of this policy and regulatory regime, radically changed the operations of tour operatorson village lands and WMAs. In a positive way, the regulations provided base prices for tourism activities, but, in a negative way, they took away the powers of local authorities to deal directly with investors e.g. tour operators. As a result, only the Wildlife Division collects and distributes all revenues generated in both WMAs and village lands. Therefore, all tour operators conducting business on villageland and WMAs need to pay all tourism-related fees and taxes directly to WD.

Therefore, based on the Non-consumptive Regulations, 2008 and the WMA regulations, 2012, upon collection, the MNRT (Wildlife Division) returns 65 percent of the total revenue generated from non-consumptive (photographic) tourism in a respective WMA to that WMA. It also retains 60 percent of total revenue generated from the tourism activities occurring on village land and only returns 40 percent of income to the village. Moreover, the WMA regulations stipulate the allocation of total revenue earned by each WMA as follows:

- No less than 15 percent shall be re-invested for resource development;
- No less than 50 percent shall be directed to member villages forming the WMA;
- No less than 25 percent shall be used to strengthen the Authorized Association (AA).

As the case of Ololosokwan Village illustrates in the case of Ngorongoro District, following the implementation of these new regulations a number of village–tour operator initiatives have either collapsed or generated less viable economic opportunities (see Sulle et al 2014).

Yet, despite the communities' participation in conservation and tourism activities in Tanzania and elsewhere in the world, these activities continue to claim community land, as they have done for decades. For example, in their article entitled 'Green Grabbing: a new appropriation of nature?' Fairhead, Leach and Scoones(2012)documented cases of green grabs for conservation or tourism related investments around the world. They argue that

> Green grabbing builds on well-known histories of colonial and neo-colonial resource alienation in the name of the environment – whether for parks, forest reserves or to halt assumed destructive local practices. Yet it involves novel forms of valuation, commodification and markets for pieces and aspects of nature, and an extraordinary new range of actors and alliances – as pension funds and venture capitalists, commodity traders and consultants, GIS service providers and business entrepreneurs

The quote above has many issues that resonate with what is happening in Tanzania. Recently, conflicts pitting communities and state authorities including park and or protected area authorities are on the rise. For example, recent evictions in Mbarali and Loliondotook place because of claims that communities are destroying environment. Such claimsare often made without sufficient consultation and evidence, which confirms Fairhead et al.'s (2012) above argument.

3.1.4 Forestry

Despite facing persistent threats such as drought and deforestation, Tanzania is one of the few African countries where about 40% of the country is classified as forest land (Sulle 2012). Available data from the MNRT shows that Tanzania's forests and woodlands cover about 38.8 million ha (FAO 2007), including gazetted national or local government forests which account for about 13.5 million ha with the remaining 25.5 million ha as forests in either villages or general lands (UTR 2011). The Tanzanian Forest Policy of 1998 and the Forest Act No. 14 of 2002 promote the distribution of resources and accommodate multiple stakeholders, especially local communities, in conserving forests. Section 4 of the Act designates four categories of forests: national forests, local authority forests, village forests, and private forests. Section 34 grants some autonomy to village governments to manage forests on village lands. Some communities have already established community-managed forests, such as village forest reserves through facilitation from government and national and international organizations.

The four categories were established by the policy, legal and institutional frameworks which govern the sector. Both the Tanzanian Forest Policy of 1998 and Forest Act No 14 of 2002 were designed to promote conservation and resource distribution, while accommodating multiple stakeholders, including local communities, in conserving forests. The policies and legislation were meant to ensure that the local communities gain substantial benefit from their conservation efforts which will in turn encourage them to participate effectively not only in the conservation but the management of forest resources. The Forest Policy 39 aptly states:

> Local communities will be encouraged to participate in forest activities. Clearly defined forest land and tree tenure rights will be instituted for local communities, including both men and women.

Therefore, because of the implementation of the 1998 Forest Policy, over 4 million ha ofcommunity-based forest management plans for forests and woodlands across the mainland were registered (Blomley and Idd 2009). Renowned community-managed forests include the Mpingo Conservation and Development Initiative (MCDI) and SULEDO forest in Kilwa and Kiteto districts respectively.

The Forest Act No. 14 of 2002 provides the basis for conservation and management of forest resources and regulates trade in forests products. Section 34 provides wide discretion to the village governments to manage forests that fall under their village lands. Nonetheless, conservation by the community at the village level may be successful when they have capacity to manage, harvest and share their resources (MCDI 2011). Some successful community-based forest management programmes have also received significant donor support.

In addition to the natural conservation initiatives, Tanzania, like many other developing countries, has realized an increase in private forest plantations from the mid-2000s till the present. Most investors who acquired land and those who did not were targeting village lands (see the case of Kilolo and Kilombero districts below). However, there is limited publicly available data showing how many hectares are occupied by private forests in the country. Although policy and the lawdo recognize and give certain powers to rural communities to participate in and benefit from forest resource governance and management, a critical challenge in establishing village forest reserves is the fact current forestry policy and regulatory framework does not provide full autonomy to village authorities to manage and benefit from forests established on their village land. Yet, like much other legislation in the country, poor implementation of land and forest laws makes it impossible to realise their good intentions unattainable (TNRF 2012).

3.3.5 Mining

In Tanzania, the mining sector boomed under the liberalization era of President Mkapa (1995 to 2005). Several laws on land, investment, and mining were revised or enacted in his era. Key legislation enacted or revised include the mining laws in 1998 (the Mining Act of 1998 repealed the 1979 Act), which aimed, through various incentives on offer,to attract foreign investment in the mining sector. The legislationallowed 100% foreign ownership, unlimited repatriation of profits and capital, and offered guarantees against nationalization and expropriation (Butler 2004). Other incentives include generous tax exemptions (no import duty or Value Added Tax (VAT)) on mining equipment and a relatively low royalty rate of 3% (Butler 2004)(the royalty rate has now increased to 6% in thenew Mining Acts of 2017.After these reforms were completed, six new gold mining companies were established: the Geita Gold (Anglo-Ashante) in 1998, Golden Pride (Resolute Tanzania) in 1998, and four others operated by the then Barrick Gold Corporation (now ACACIA) in Bulyanhulu in 2001, North Mara in 2003, Tulawaka in 2005 and Buzwagi in 2009 (Roe and Essex 2009).

In addition, from 2006 to 2017, Tanzania has registered another significant interest in gas and oil exploration with huge discoveries of gas deposits already made. Tanzania has been exploring gas for over the past fifty years, but the commercial production of the earlier gas discoveries started in 2006 in the coast of Lindi and Mtwara regions. The gas is transported via pipeline to Dar es Salaam for electricity generation, domestic and industrial uses. Further major discoveries only happened between 2012 and May 2016. To-date, a total of trillion cubic feet (TCF) 57.25 has been discovered of which TCF 47.13 are in offshore wells and TCF 10.12 in inland especially, in Ruvu area, Coastal Region (URT 2017c).

Unlike other land-based investments such as agriculture, forestry and tourism where communities may somehow be part of such investments, mining investments – particularly gold and diamonds have led to local (artisanal) miners being displaced. For the past few decades until 2017there has been an outcry that mining is not benefiting immediate communities and the country at large (Fisher 2007, Lissu and Curtis 2008; Perdesen et al 2016; Jacob et al 2016; Figure 1). The major problem with the mining industry is not only inadequate policy and regulatory frameworks (which govern the industry, stipulate revenue sharing with communities, taxes and charges due to the state), but poor implementation of such instruments (see Figure 1).Since the above weaknesses were acknowledged by the government, further reforms were executed which saw the enactment of the Mining Act of 2010 and the Petroleum Act of 2015, both of which provide extensive details about the obligations of extractive sector companies and the right of the state to oversee, control and tax their operations (Jacob et al 2016). The recent reforms have also brought back government interest as an investor in the extractive sectors especially through the Tanzania Petroleum Development Corporation (for oil and Mining) and State Mining Corporation (for minerals) (Ibid).

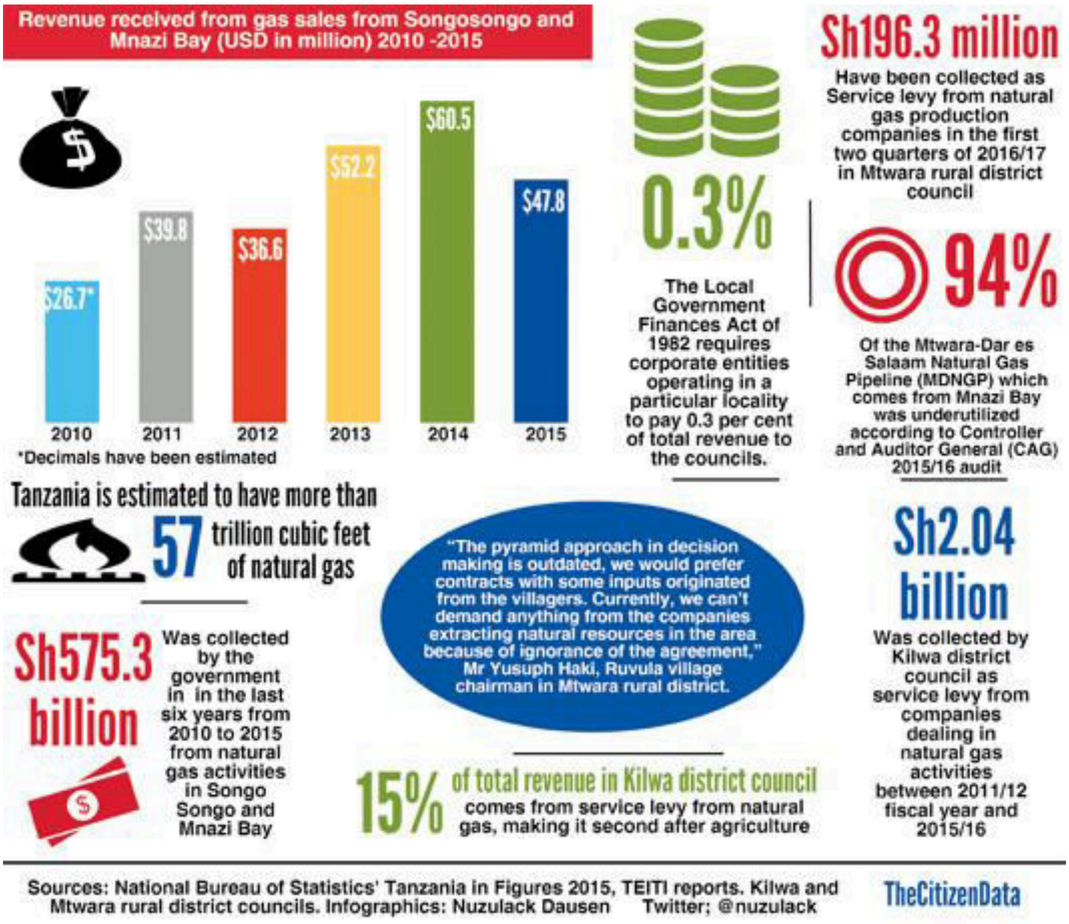
Mining: A source of revenue, conflict, injury and death?

In Tanzania, mining (especially gold mining) contributes significant foreign currency earnings, amounting toUS$ 1.5 billionin 2016 (BOT 2017). However, since large-scale mines have been established, the country has experienced numerous conflicts between artisanal miners and villagers on the one hand, and companies on the other, as they both struggle to maintain their interest in the lucrative business. As a result, for decades, mining activities have caused not only conflicts, but serious injuries, loss of life, and loss of domestic animals. For example, Phambazuka News (August 2017) reported that since 2014 there had been 69 injuries and 22 deaths at North Mara mine. The report said:

> Most of the victims were impoverished villagers who scratch rocks for tiny bits of gold and who often mined these territories prior to Barrick's arrival. An early 2016 government report found security and police paid by Barrick had killed 65 people and injured 270 at North Mara since 2006. Tanzanian human rights groups estimate as many 300 mine related deaths and the *Financial Times* reports that not a single police officer or security guard working for the company has been killed on duty.

Such media reports are backed up by many reports produced by Tanzanian activists and church organisations over the years (Curtis and Lissu 2008; TEC et al 2017).

Figure 1: Gas revenue and expenditure analysis



Nonetheless, new reforms executed by the fifth Government such as the enactment of new mining acts in July 2017 are promising in terms of curbing taxation evasions and other malpractices by multinationals engaged in the mining sector. It thus remains a top issue for further investigation the extent to which the newly enacted laws will be implemented and with what results in the industry. In the next section, the paper introduces the concept of business models before examining existing and proposed business models within and outsides SAGCOT.

3.2 Business models

One way to assess the impacts of land-based investments is by scrutinizing their business since each model affects communities and the country in different ways/ for example, different models for community access to productive resourcesoffer differentbusiness opportunities in the overall value chain or downstream and upstream activities (especially for mining investments). Business models are also important because the fundamental assumption of SAGCOT plans, for example, is that in respect of agriculture, smallholders will benefit from the large-scale investments promoted by the government and the private sector. For example, the nucleus–outgrowers model promoted by SAGCOT reflects recent calls in "land grab”[2] literature, suggesting that adopting ‘inclusive business models’[3] (IBMs) in land-based investmentswill provide alternatives to the current large-scale land acquisition (Vermeulen and Cotula 2010; Cotula and Leonard 2010). The core argument of IBM literature is that alternative models provide an opportunity to execute investments whichensure that the existing land users do not lose their rights to access, use, control and own land. Ideally, such models thus empower communities not only to produce in their own land, but to have a voice in business decision making processes, and share benefits and risks resulting from such business activities with their business partners(mainly processing firms). Yet, as the report illustrates below, none of the models always meets the conditions highlighted above because there is no effective legal and institutional framework that clearly stipulates the ownership of resources, and sharing of risk and rewards among the operating partners (Anseeuw et al., 2012; Prowse 2012 and FAO 2013; Care International 2017).

4.0 Findings from case studies

This report present findings on land-based investments occurring in five districts, grouped into two categories: three districts within the SAGCOT area and two districts outside SAGCOT.

4.1 Land-based investments within the SAGCOT Area

SAGCOTis the first ever initiative to set ambitious targets for large-scale agricultural plantations and ranches, and alsoset the stage for high level private sector investments in agriculture. Since it was launched at the World Economic Forum Africa Summit in Dar es Salaam in 2011, SAGCOT has been touted as the ‘Kilimo Kwanza (Agriculture First)’[4] in Action. It aims to produce “inclusive, commercially successful agribusinesses that will benefit the region’s small-scale farmers, and in so doing, improve food security, reduce rural poverty and ensure environmental sustainability”[5].The multibillion-dollar project is part of the agricultural development corridors first coined and promoted by Yara-a Norwegian Fertilizer Company (Paul and Steinbrecher 2013; Sulle 2016a). Through the SAGCOT initiative, the government and its SAGCOT partners’ aims to “bring 350,000 hectares of land into profitable production, transition 100,000 small-scale farmers into

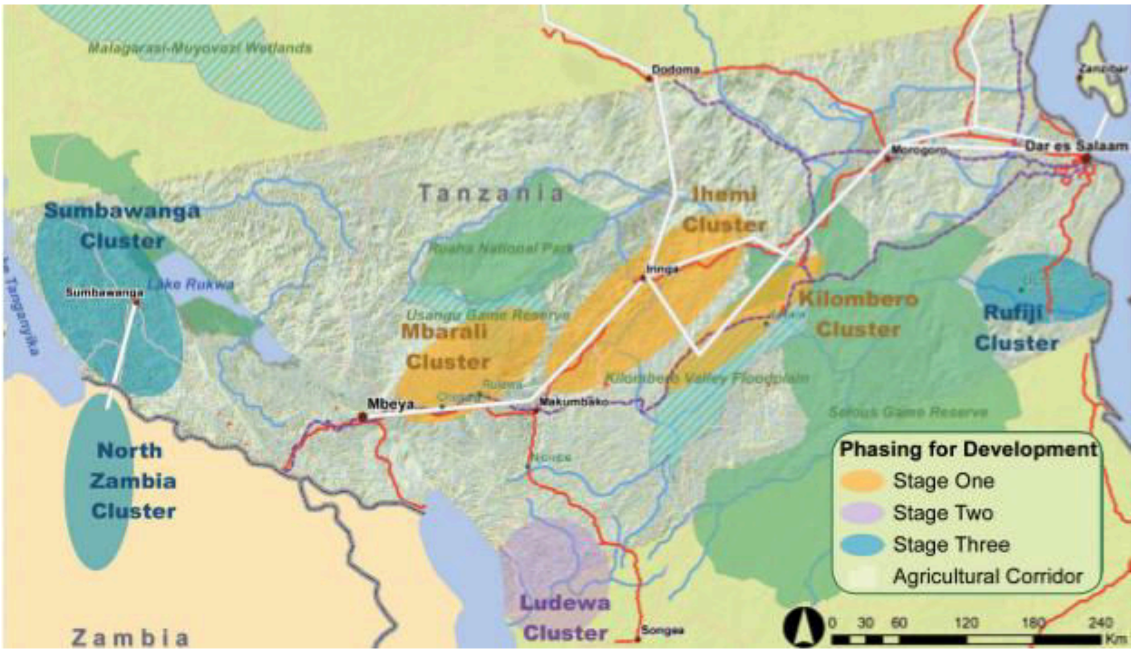
[2]A colloquial term for large-scale acquisitions, implying that these acquisitions are harmful.
[3] This report adopts the definition of inclusive business models as advanced by Vermeulen and Cotula (2010): Business models are considered as more inclusive if they involve close working partnerships with local landholders and operators, and if they share value among the partners. More inclusive business models encompass a wide range of arrangements. Some models involve large-scale farming, but with closer involvement of local landholders. Others bring smallholder farmers into the value chain. […] None of these models is perfect… (Vermeulen and Cotula 2010: 3).
[4]Kilimo Kwanza is the slogan championed by the private sector as the means to transform agriculture through enhanced productivity in the country. See more on Kilimo Kwanza in the next section.
[5]For more details about SAGCOT, its partners and project plans:Southern Agricultural Growth Corridor of Tanzania, “SAGCOT”: http://www.sagcot.com/.

commercial farming, create 420,000 new employment opportunities, lift 2 million people out of poverty, and generate 1,2 billion dollars in annual farming revenue"[6].

While SAGCOT has indeed managed to develop several medium-scale investments in its initial three clusters (Kilombero, Mbarali and Ihemi – see Figure 2 below), to datemost of the SAGCOT targets and those of other initiatives such as New Alliance have not yet been met. One explanation for SAGCOT's failure to establish large-scale estates is precisely the difficulty in accessing village land and the possible backlash in doing so, hence SAGCOT's focus is currently on securing general land (land owned by state parastatals and/or individuals willing to offer land)[7].Elsewhere, it has recently been documented that the flag bearing projects under the disbanded Big Results Now initiative are struggling to take off. For example, the EcoEnergy Project in Bagamoyo which aimed to develop a combination of sugarcane estate and outgrowers scheme took too long to materialize largely because of (1) local communities' resistance to the project, (2) uncertainties about compensation and involuntary resettlement (Chung 2015; Action Aid 2015), and (3) the project's potential to distort natural ecosystem in the area. The project was then cancelled in November 2016.

Below I expand on the several aspects of SAGCOT within the three district case studies.

Figure 2. The first three priority cluster areas of SAGCOT



Source: SAGCOT (2011) Invest Blueprint

[6] ERM, Southern Agricultural Growth Corridor of Tanzania (SAGCOT) Strategic Regional Environmental and Social Assessment, Interim Report, prepared for the Government of Tanzania, July 2012: http://www.sagcot.com/uploads/media/Interim_Report_-_SAGCOT_SRESA_Final_12_02.pdf (accessed 12 May 2017).

[7] Interview with SAGCOT Centre Official, August 2017

4.2.1 Kilombero District: Profile

Located in the northern part of Morogoro Region, Kilombero District is one of the leading areas for hosting large-scale land-based investments in the country. It is home to the largest sugarcane producing companies – the Kilombero Sugar Company Limited (KSCL), Kilombero Plantation Limited (KPL), the largest rice-producing company in East Africa, and the largest timber producing company – Kilombero Valley Teak Company (KVTC). The Kilombero valley lies in the district, which forms part of the Rufiji River Basin – the largest river basin in the country. The district receives two distinct long and short rainy seasons of March–May and November–January/February, respectively, but rain sometimes falls uninterrupted from October to March (Smalley, Sulle and Malale 2014) making the valley deposit the richest alluvial sediment (Marshall 2008; Futoshi 2007). Kilombero district is the second most populated district after Kilosa District in Morogoro Region. According to the National Census of 2012, Kilombero District has 407,880 people, of which 202,789 are men and 205,091 women; it also has 94,258 households, with an average household size of 4.3 persons (URT 2013a).

The Kilombero Valley liesin the high profile SAGCOT[8] clusters targeted for large-scale agricultural intensification investments (SAGCOT undated). The area currently hosts the largest number of small producers producing a variety of food and cash crops as well as three large-scale agribusinesses. The district also hosts large areas earmarked as a *suitable location for large-scale rice and sugarcane farming and smallholder irrigation schemes*. These new sites include the long-time abandoned area at Ruipa, about 100km south-west of KSCL, where the Tanzanian government through the Sugar Board of Tanzania (SBT) has sought investors to lease a 10,000ha site demarcated for sugarcane production using the nucleus–outgrower model (Bergius 2014). Kilombero valley is also one of the three districts in which theGOT and three development partners are implementing the Land Tenure Support Programme (TLSP) which aims to offer up to 300,000 parcels of land titles (Certificate of Customary Rights of Occupancy (CCROs)) in Kilombero, Malinyi and Ulanga districts. Therefore, KilomberoDistrict t is not only suitable to assess the impacts of existing land-based investments, but also, crucial in determining the impacts of ongoing land formalization initiatives in the country. Before the start of TLSP programme, few villages had initiated land titling especially in cane growing areas (Smalley et al 2014). It is envisioned that these two aspects among many other issues explored in the district will provide not only key opportunities but entry points for the LBI-WG in assessing land-based investments in this district and the country as a whole.

Sugarcane farming in Kilombero District: KSCL

Sugarcane is a key commercial crop in Tanzania. Sugarcane production in Kilombero Valleystarted in early 1920s. Funded by the International Finance Corporation, the Commonwealth Development Corporation, Standard Bank and two Dutch financial organizations (Sulle 2016) the Kilombero Sugar Company (KSC) established its first

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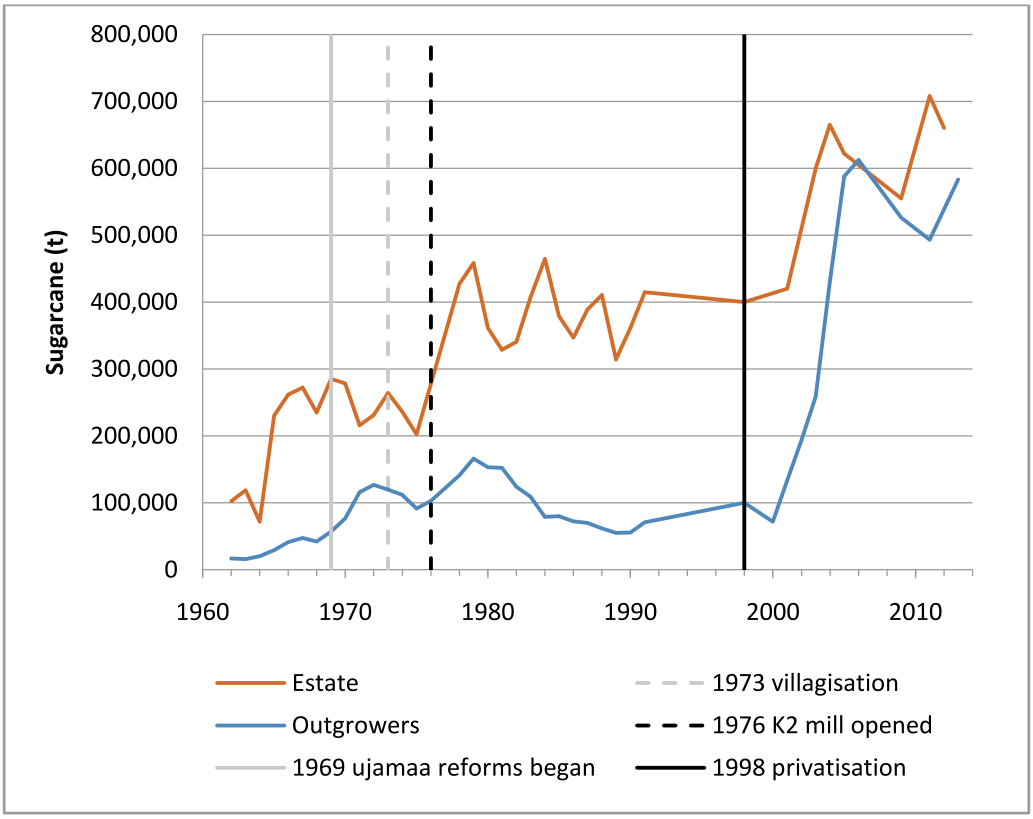
[8] Within SAGCOT, the government has identified six clusters to be developed as part of its initiative to consolidate resources within priority and productive areas in the country. More details see:http://www.sagcot.com/uploads/media/Invest-Blueprint-SAGCOT_High_res.pdf

factory in Msolwa Area in 1960s. KSC was later nationalized in 1967 after the implementation of Arusha Declaration which saw the government retaking management of industries of high economic value to the country. The company was later privatized in 1998 to South African Company, Illovo Sugar Group which is currently owned 100 percent by the Associated British Food. The government has maintained 25 percent shares in the company. From its inception, the company operated outgrowers leasing about 9,562ha from the central government, 8,000 ha of which is under sugarcane and the remaining land used for factories, offices, staff houses and social amenities. The company runs two sugarcane crushing and processing facilities in its compound (Illovo 2014).

In 2014, the company was employing about 4,500 people on permanent, seasonal and temporary basis and it was buying sugarcane from over 8,500 registered farmers who cultivate about 12,000ha of sugarcane (Sulle and Smalley 2015; Smalley et al 2014; see Figure 3). As per the Sugar Act of 2001, outgrowers can only sell their sugarcane to a company with which they have registered. As such, KSCL partnership with outgrowers is based on the cane supply agreement (CSA) negotiated and signed by the company and the associations of outgrowers every three years. CSA stipulates the division of proceeds between the company and the outgrowers. As of 2013/14, the outgrowers received US$35.6 per tonne of delivered sugarcane before adjustments for sucrose levels and actual sales are made. Once all the processed sugar is sold, the company and outgrowers share their proceeds at a rate 57 percent for outgrowers and 43 percent for the company (Smalley et al, 2014). As of July 2017, however, the proceed-sharing arrangement changed to 40 percent for outgrowers and 60 percent for the company. The changes were a result of the company surpassing production of outgrowers cane.[9]If both parties are not happy, the CSA provides room for amendment every season as needed (Smalley *et al.,* 2014). KSCL's partnership with outgrowers is slightly different from the usual contract farming where farmers are used to only sell the primary product to the buyer. Under the KSCL arrangement, farmers have some (limited) space to participate in decision-making meetings including those that decide on annual price for cane, but not much in the downstream sugar businesses (Sulle forthcoming).

[9] Personal communication with the cane growers association official, July 2017

Figure 3. Total amount of sugarcane produced or harvested* annually by the company estate(s) and by outgrowers



Source: Adapted from Smalley, Sulle and Malale 2014.
* Some data unclear as to whether they show total cane produced, harvested or crushed.

Challenges associated with sugarcane farming

Recent studies by Smalley et al. (2014), Sulle (2016) and Dancer and Sulle (2015) found mixed impacts of sugarcane farming at the household level, including that despite increased sugarcane production in Kilombero over time,few families have diversified the economic activities that benefited from such farming. Families that depend on sugarcane production alone remain vulnerable to many other potential risks such as price fluctuation, low records of sucrose levels for sugarcane delivered to the company, and the recorded weight of tonnage delivered. Moreover, as a result of increasing local demands for sugar, cane production is becoming a lucrative business attracting wealthy individuals currently accumulating poor farmers' land and taking advantage of other business associated with cane production, such as cane loading and transportation

Another critical consequence of sugarcane mono-cropping in Kilombero Valley is the declining land area for food production, which is forcing poor families to commute from their sugarcane producing villages to nearby or far way villages to get plots to grow food crops. All these have a hefty impact on families who have to incur travel costs, wasted time in travel and lost opportunities to take care of their children. As a result, in

Kilombero Valley, cases of school dropouts and teen pregnancies are on the increase (Smalley et al 2014, Dancer and Sulle 2015).

KSCL as a success story

Despite the above challenges, in recent years, KSCL is often referred as a success story in Tanzania's sugar sector. Its model, which combines estate and small-scale outgrower production is set to be replicated, as increasing sugarcane production using outgrowers is a core component of SAGCOT (Sulle et al 2014).

Rice farming in Kilombero District: KPL

Research evidence shows that rice farming based on indigenous farming system in Kilombero Valley dates to mid-nineteenth century (Kato 2007). The fertile alluvial soil enriched by run-off from Kilombero River tributary supports both subsistence farming and large-scale commercial farming in the area in recent years. It is within the same valley that Kilombero Plantation Ltd (KPL) –a joint venture between the Rufiji Basin Development Authority (RUBADA) and Agrica Limited of UK– is currently producing industrial-scale rice for both domestic and international markets. Founded in September 2005 to develop a model for sustainable agribusinesses in East Africa, KPL acquired a former government farm ('Mngeta farm') located in Mngeta village), which previously belonged to the Korea Tanzania Company (KOTACO) and then to RUBADA (Chachage 2010; Mwani and Kamata 2011). Mgeta farm covers 5,818ha of land around three villages of Mngeta, Mkangawalo, and Lukolongo in Kilombero district Morogoro region.

Although the company acquired what is deemed to be a general land, its initial plans to revamp the abandoned state farm resulted into land disputes with local people using the land. Locals were concerned about their proposed resettlement and the token compensation offered (Chachage 2010). The company and the government had to agree to resettle communities and token compensation because since KOTACO collapsed, local farmers reoccupied the land they believe was alienated from them or their forefathers. But, since the new investor wanted to maintain the company's reputation amidintensified debates of land grabs at the end 2000s, KPL agreed with communities that each household that was to be displaced would receive a three-acre farm and a house built at the company's expenses (Baha and Sulle 2013).

Therefore, after concluding its deal with villagers, the company continued with rice production in 2010, andthe government awarded AGRICA National Strategic Investor Status. According to the company's website, it is now the leading rice producer in East Africa. In 2011, the company was a SAGCOT's showcase project at the World Economic Forum. Currently, the company has attracted huge donor funds to support a variety of activities, such as in 2015, securing support from the African Enterprise Challenge Fund and USAID's NAFAKA funds to scale up the smallholder project to the tune of 7,403 farmer families.[10].

Despite the initial success reported in its website and other state documents, the company's contract farming schemes with outgrowersare not well documented. Initial

[10]http://www.agrica.com/html/project2.html accessed on 29 July 2017

findings from field interviews indicate that small-scale farmers are yet to fetch better prices as the company offers either similar or lower prices to those of local middlemen.[11]The company has often cited the cheap imports of Asian rice as the cause of farmers' low prices.[12]In addition, the KPL, is accused of contributing environmental pollution, which affects the crops and thus the livelihoods of nearby communities (Oakland Institute 2015).

Forest plantations in Kilombero District: KVTC

Apart from food and cash crop plantations for sugarcane and rice, Kilombero Valley is also currently expanding large-scale forest plantations. The district is home to the country's largest timber producers – the Kilombero Valley Teak Company (KVTC) and the Green Resources Ltd (GRL) (see details for GRL in the case of Kilolo District below). KVTC is a multinational company owned by Global Environment Fund (GEF), funded by development finance institutions from North America, Europe, and Africa) and Finnfund (mainly the Finish government initiative)[13]. KVTC was established in 1992 and today it runs 28,132 ha of land in Kilombero and Ulanga Districts in Morogoro Region. It specialises in establishing a viable hardwood reforestation project with teak plantations set in a mosaic between natural forests and other natural vegetation. Recently, with the support from the Finnish Government KVTC aimsto develop outgrower plantations. Already, the company website indicates that since 2015, the two companies (KVTC and Green Resources Ltd)have planted about 606 hectares of outgrowerforests in their areas of operations.[14]Despite the important role timber plays in bringing foreign currency for exported hardwoods and other environmental benefits, expansion of forest plantation into village land is likely to cause more pressure on already land scarce villagers in the district.

4.1.2.Kilolo District

Kilolo District, with an area of 9,243.83 km^{2}and a population of 218,130 people, is located in Iringa Region. Like Kilombero District, Kilolo is situated within the Ihemi Cluster – another high profile SAGCOT[15] cluster targeted for large-scale agricultural intensification investments (SAGCOT undated). It already hostsa number of small and large-scale agriculture and forest plantations. Being in the southern highlands of Tanzania which "exhibit unimodal rainfall pattern from November to April," (Mbululo and Nyihirani 2012: 454), the district is suitable for growing major food crops: maize, legumes, fruits, and vegetables. The region is among the big four regions described as the breadbasket of the country, and for several decades, the district has received government subsidized fertilizers to ensure steady food crops production (URT 2012).

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[11] Interview with key informants, Kilombero, April 2017

[12]http://agritrade.cta.int/Agriculture/Commodities/Rice/Tanzanian-rice-sector-stakeholders-call-for-consistent-application-of-rice-import-tariffs

[13]www.kvtc-tz.com/home

[14]http://kvtc-tz.com/finland-moves-to-support-private-grown-forests-plantations/accessed 26 May 2017

[15] In SAGCOT, the government has identified six clusters to be developed as part of its initiative to consolidate resources within priority and productive areas in the country. More details see:http://www.sagcot.com/uploads/media/Invest-Blueprint-SAGCOT_High_res.pdf

The district is known to produce variety of permanent staple food (i.e. maize, beans and rice), vegetables (i.e. tomato, cabbage, onions, carrots) and fruits. Many households plant trees (timber) intended as aninvestment, especially in their less fertile land; a few also keep livestock (Locher 2015: 44). Large-scale land-based investments in the district include forest plantations as detailed below. Regarding the LBI-WG assignment, Kilolo District is a perfect site to learn the impact of these large-scale investments on village land, livelihoods and environment at large.

Forest plantations in Kilolo District: Green Resources Ltd

Green Resources Ltd (GRL) is a subsidiary of Green Resources SA (Norwegian).[16] According to the company's website, 'GRL manages four main plantations in the Southern Highlands with 17,000 ha of standing forest. The land set-aside for planting is low-value grassland, acquired mostly from local villages.' The company's plantations are inMufindi, Kilolo and Kilombero districts. It produces Forest plantation Timber (pine, eucalyptus, and teak), saw logs, poles, energy production, and carbon credits. Its sells timber mainly in domestic markets, but around 8%–10% is exported to Kenya, Mauritius, Dubai, Ethiopia, Eritrea, and Seychelles (Locher 2010). The company's website indicates its grand plans which include developing more plantations in the Kilombero District, including Mnyera Plantations with a total of 42,656 ha located in the villages of Kitete, Taweta and Uchindile villages.[17]

4.1.3 Mvomero District

Mvomero District is one of the seven districts of Morogoro Region; it covers an area of 6,632.9 km^2 with a population of 312,109 people. The district is known for hosting large-scale land-based investments such as sugarcane plantations, but also for violent land-based conflicts pitting pastoralists and farmers. It is also located within the SAGCOT region. To-date, research reports have established that Mvomevo, Kilosa and Kilombero districts in Morogoro region, where the highest production of sugarcane and rice is taking place, are also the areas with the highest number of deaths, injuries, and loss of property resulting from persistent fighting between pastoralists and farmers (Mwanfupe 2015; Massay 2017). This district is thus chosen to investigate how further large-scale land-based investments envisioned within SAGCOT would be implemented, especially within the narrative that there is 'plentiful land' in Tanzania.

Sugarcane Production in Mvomero District: Mtibwa Sugar

Mtibwa Sugar was established in 1973 by then state-owned Sugar Development Corporation (SUDECO). The company leases an estate of about 6,000 ha of land and in 2013, it was employing about 4,700 workers – all permanent, seasonal and casual labourers. In 1999, both its cane crushing factory and estate were privatised to a local investor – the Tanzania Sugar Industries Ltd. (TSIL) (Mtibwa Sugar Estates Limited 2009). After privatisation the new management made several reforms including the devolving services to outgrower associations, meaning that all services the formerly

[16] www.greenresources.no or www.greenresources.no/Plantations.aspx
[17] http://www.greenresources.no/Plantation/Tanzania

state run factories offered to outgrowers were stopped, including cane harvesting. Farmers had to form associations to be able to carry out cane production operations. Currently, there are two registered associations servicing outgrowers that produce sugarcane around the Mtibwa Sugar estates: MtibwaOutgrowers' Association (MOA) and Turiani Cane Outgrowers.

According to a study commissioned by MVIWATA in 2012,MSE outgrowers were responsible for 48% of cane delivered to its mills. Both outgrowers and the company share the final proceeds at 53.5 percent and 46.5 percent respectively. However, in recent years, outgrower performance has declined significantly because of the company's poor cooperation with them.[18]Some studies suggest that the deteriorating relationship between the company and outgrowers is probably due to the political patronage the company enjoys (Mmari 2012; Magongo 2008). Despite its ailing financial situation, the company still aims to expand its nucleaus estate, and it has acquired an additional 30,000 ha land which was previously owned by the government, i.e. the "Dakawa Estate" or "Dakawa Ranch" (Mtibwa Sugar Estate Limited 2009). It is unclear if or how many outgrowers the company might work with once it has fully developed its new Dakawa Estate.

4.2 Land-based investments outside SAGCOT area

4.2.1 Ngorongoro District: Profile

Ngorongoro District is situated in Arusha Region in northern Tanzania. The district has a population of 174,278 people (NBS 2012) and is among the leading districts for wildlife conservation and tourism. It has about 25,500 km^2 under conservation, which includes the Serengeti National Park and the Ngorongoro Conservation Area (NCA), both of which are classified as World Heritage Sites and have been put under the Protected Area Management (Ojalammi, 2006). The NCA alone covers about 59% of the district land. The reserves have been established to (1) generate resources for the national and regional authorities/economies and (2) protect and conserve land and wildlife. The remaining 41% of the whole district land is referred to as Loliondo Game Controlled Area (GCA) and Lake Natron Game Controlled Area. Apart from having the largest nature conservation units, Ngorongoro district caters to various human activities such as wildlife tourism, tourism and licensed hunting enterprises, settlements, pastoralism and agriculture (Ojalammi, 2006:4).

The district is home to Maasai pastoralists who engage in livestock keeping as their mode of livelihood, but also undertake a range of income-generating activities that include but not limited to tourism businesses. Since early 1990s, several villages in Ngorongoro have established tourism-related joint ventures with tour operators who lease out portions of their village land to establish temporary tourist camps and permanent lodges. These ventures have generated significant incomes for villages like Ololosokwan and Engaresero. Yet, in Ngorongoro District land-based investments have also been a source of both wealth and conflict. This district, thus provides a number of interesting lessons for this study, particularly on understanding how these community-

[18] Sulle, interview with association leaders, March 2016

based land-based investments were established and how they have evolved over time amid regulatory changes over the past decade or so as further illustrated below.

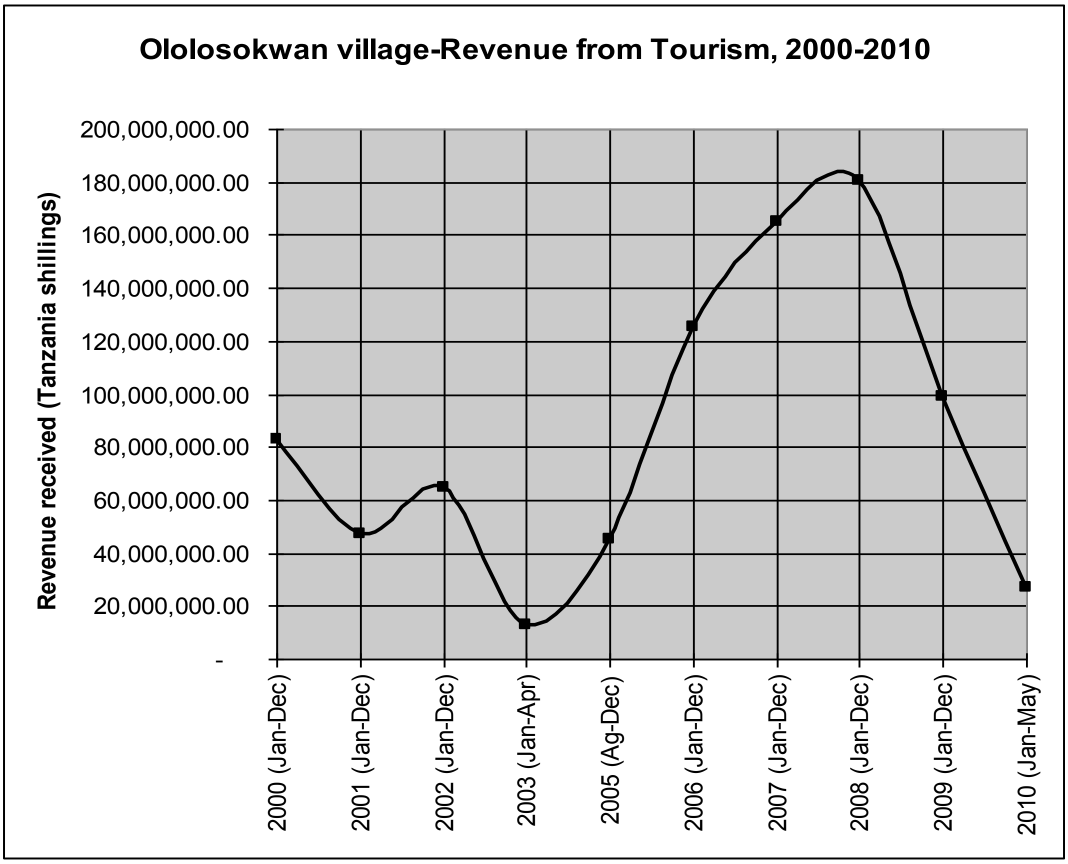
Village – Tour Operator Arrangements

Ololosokwan Village is one of the first villages in the country to establish village–tour operator partnerships in photographic tourism from the 1990s (Nelson and Ole Makko 2005). As a result of the potential resources and emerging resource-based conflicts, villagers and their leaders received training from various civil society organisations (CSOs) and faith based organisations. The awareness-raising trainings enabled the village to enter into several joint ventures with tour operators, including an agreement with '&Beyond Klein's Camp', which constructed a tourist lodge in a 25,000-acre concession area. In 2015, the company was paying the village an annual land rent of about US$ 50,000 as well as a fee per tourist per night. After some months of contract re-negotiation, in 2016 the company agreed to pay an annual rent of $112,500 (pers. com village chair, March 2016).

The village had other arrangements with tour operators who were operating temporary camps on the village land. These investments included companies such as Asilia, Nomad Tanzania and Unique safaris. The village was earning bed night fees from CC Africa, and bed night fees from Sokwe and Nomad and the earnings increased significantly in 2006-2007 up to about US$96,000 per year (Sulle 2007; also see Figure 4 below). This is because, from 2007 onwards, the village was earning about US$35 (Tshs 42,000) per night per tourist. The same village earned about US$165,000 (Tshs209, 800,952) in six years from photographic tourism between 1998 and 2003 (Ololosokwan Village Council 2004; Sulle 2007). In contrast, for ten years between 1994 and 2003, the village was able to collect only US$17,650 (Tshs 22,500,000) from Otterlo Business Corporation (OBC) (the hunting company) (Sulle et al 2014; Ololosokwan Village Council 2004). According to the wildlife legislation, hunting tourism which is administered by the Wildlife Division is widely carried out in Game Controlled Areas (GCA), most of which overlap with village lands, as in the case of Ololosokwan Village.

However, after further reforms in the wildlife sector which stripped off powers of village authorities to collect tourism generated revenues at the village level, which intensified conflicts between OBC and the village. In 2008/9 two operators (Nomads and Sokwe) took significantly fewer tourists to the village causing a sharp decline in village earnings. OBC, supported by government, claims to have the sole right of hunting in the Loliondo Game Controlled Area (GCA) because of the concession rights it holds. However, villagers disagree because they have never been consulted by either the government or the hunting company. Despite all efforts, the conflict between communities on the one hand and the state authorities (including NCAA and SENAPA) and OBC on the other, continues. This ongoing conflict is reflected in the 14 August 2017 evictions of Maasai families and burning down their houses.

Figure 4: Revenue trends from tourism business at Ololosokwan village



Source: Adapted from Sulle et al 2014 who obtained it from Ololosokwan Village Office in August 2012.

But, why this long-lasting conflict in Loliondo? The core issues are associated with land-based investments, dating back to 1992, when OBC first secured its hunting permit from the central government without rural villagers' consent. But, the current conflict was triggered by government announcement through the Ministry of Natural Resources and Tourism in March 2009 that of the 4,000 km^2 of Loliondo GCA, 2,500 km^2 would remain village land, and 1,500 km^2 would be designated as GCA. The proposal to apportion village lands largely ignores the reality that until today the whole of Loliondo GCA is settled and used for pastoralist livestock production by its Maasai residents who have occupied the area for the last two centuries (Sulle et al 2013). If implemented, the 1,500 km^2 set aside as GCA will represent the loss of 40% of the villagers' customary land and other natural resources. In turn, the apportioning of the Maasai land would significantly lessen their livelihood assets, contribute to the loss of annual livestock production, and affect their entire livelihood. As a remedy to this conflict however, the government after long consultation and following recommendations of the multi-stakeholder team decided to adopt the Wildlife Management Area. However, it remains to be seen if this new strategy will be fully implemented and conflict will be resolved permanently.

4.2.2 Kilwa District

Kilwa is one of the oldest districts in the history of Tanzania. Being one of the earliest entry points of the Asian traders, the district not only hosts a number of historic sites, but more recently, the home to largest investments in natural gas and agriculture. The district has an area of 15,000.09 km^2 and 190,744 people (NBS 2012). In Kilwa District the largest investment in a biofuels project (located in 2008) was aborted leaving villagers struggling to recover their lost village land (Chachage and Baha 2010; Sulle and Nelson 2013). Kilwa District was therefore purposely chosen to provide insights not only from agriculture investment practices, but also from gas investment. Other core issues explored in this district include the ways local communities benefit from (or lose out to) mining investments in terms of benefit sharing models, compensation and job creation.

Gas extraction in Kilwa District

Pan African Energy Tanzania Ltd. has been drilling gas in SongoSongo Island in Kilwa district, Lindi Region for more than five years without paying any revenue to the district council until April 2012. As per the Local Government Act of 1982, all corporate entities operating in any particular local jurisdiction are required to pay 0.3 percent of total revenue to a district council (Figure 1 above). Although the new Petroleum Act 2015 has strengthened the provisions to ensure local communities and their respective authorities benefit, such benefits are subject to interpretation and manipulated by higher authorities to favour national interests at the expense of local communities which bear impacts of such resource extraction (Jacob et al 2016: 1).

Failed BioShape Deal and its intergenerational impacts

Kilwa District perhaps offers a major lesson on the key intergenerational implications of large-scale land-based investments, particularly, the transfer of village land to general land. This is because research has shown that the current methods and amounts of compensation paid to the individuals or communities that have offered their land to land-based investments are inadequate and controversial. The calculation of the compensation paid does not take into account the intergenerational impacts and the real value of the land, but villagers are merely paid for any development they have made over land (Sulle and Nelson 2013). Intergenerational consequences include reduced access to land for the current youth and the future generations.

As it stands, most compensation deals fail to place a value on the ecosystem services that underpin economies, both in the area of the acquired land and outside these areas, due to far-ranging effects on soils, tree cover, and water. This economic value is rarely considered in the offered payments. Compensators often fail to provide accurate, prompt and adequate information about the value and real benefits of the project to affected communities. The Dutch Company, Bioshape, which acquired 34,000ha of village land in Kilwa District for 99 years, and the former British Company, Sun Biofuels, which acquired 8,211ha of village land, demonstrate these claims. For instance, Bioshape paid a compensation of US$324,000 for the whole amount of land (34,000ha) of which the district council received 60 percent and villages earned a mere 40 percent (Sulle and Nelson 2009; 2013). In principle, this compensation payment marginalized villagers and stood in violation of the Village Land Act, which bestows the management of the village land to the Village Assembly. The main role of the district council was to facilitate the process by empowering the community to understand investments and participate effectively in land use planning through its land and natural resources department. The process through which villagers lose access to their land, the land is abandoned by an investor, then the government takes time to return the land to the villagers, not only affects the immediate villagers, but the future generations.

5.0 Overarching issues on land-based investments

5.1 Inadequate policy, legal and institutional framework on land-based investments

Currently, a lack of effective policy, legal and institutional frameworks governing land-based investments is a major challenge facing communities and the country at large. Although Tanzania's existing land laws provide a legal and procedural framework to guide how to acquire, transact and dispose of land, this framework has some ambiguities (TNRF 2012). Some researchers have expressed concern that the country is not fully prepared to handle foreign direct investments (FDIs) in land (Tenga 2013). For example, the government's guidelines governing land-based investments are unclear.

Currently, the only guidelines in place are the *Guidelines for Sustainable Liquid Biofuels Development in Tanzania*, released in 2010. These guidelines were formulated by the government in response to widespread criticisms about a lack of coordination and regulation of biofuel investments, which violated community land and human rights from the mid-2000s to 2010 (Sulle and Nelson 2013). The guidelines require any developers and investors to consult local, regional, and national stakeholders during the feasibility study and project planning phases, and to sign a memorandum of understanding with the relevant local (village) authorities in all areas that fall within their project boundaries. The guidelines further introduced the concept of a land ceiling of up to 20,000 ha for biofuel development projects. To date, however, some proposed allocations of land under the government's SAGCOT initiative surpass this stipulated ceiling, and it is unclear whether these biofuel guidelines, which are not backed by a legal framework, will be used or not.[19] This regulatory uncertainty contributes to tenure insecurity for local people and investors.

5.2 Escalating land-based conflicts

In the past few decades, due to growing pressure on land, the immediate impacts of large-scale land-based investments in Tanzania have been increasing land-based conflicts that are turning uglier and uglier. Land use conflicts between private investors, state agencies, and local communities are happening in different parts of the country, and are related to widespread wildlife conservation and tourism investments, particularly in the northern part of the country where much tourism is carried out (Sachedina 2008; the case of Ngorongoro above). While those related to the expansion of land uses for both agriculture and livestock keeping are widespread in Kilosa, Mvomero and Kilombero districts in Morogoro region; Kilindi and Handeni districts in Tanga region; Mbarali districts in Mbeya region, Rorya and Tarime in Mara region;

[19] For instance, through the SACGOT investment promotion, the government was auctioning an area of up to 65,000 ha for the development of sugarcane and rice plantation. For more http://www.sagcot.com/news/newsdetails/artikel//invitation-for-expression-of-interest-for-the-tender-of-the-mkulazi-site/ accessed on 24 September 2015

Mwanza districts, Arumeru district in Arusha region; and Simanjiro, Kiteto and Babati districts in Manyara region (OSIEA and OSF 2013:43 as quoted in URT 2015).

All land-based conflicts result from the struggle between land users with each group competing against each other in an attempt to secure certain interests in land20. For example, in districts such as Kilombero, Kilosa and Mvomero, where the highest production of both rice and sugarcane is taking place,numerous incidences of death, injuries, and loss of property resultfrom persistent fighting between pastoralists and farmers.[21]These conflicts somewhat contradict the view often presented by government officials that there is plentiful land in Tanzania for large-scale investments. To the contrary, the reality is that most land users in Tanzania are competing for the same high potential land with access to water and infrastructure which is targeted for large-scale investment – often from foreign individuals or companies.

5.3 Individual titles

In Tanzania, today as in many African states, an emerging narrative is that land-based investments (particularly in agriculture) is very difficult because land has a lot of problems. As a response to addressing land-based challenges, land formalization is promoted as a cure for all. Indeed, land titling is one form of securing individual and communal rights over land, but as recent research has shown, it is neither the priority for the most Tanzanians (Stein et al 2016; Maganga et al 2016), nor the solution to the current shortcomings of land administration in the country. The core problems of land administration are poor administration, incompetent staff, corruption, and widespread ethical decay among civil servants and wider society, which has become particularly acute in recent years (Sulle et al 2016). Land titling by itself will neither solve these challenges, nor will it improve the livelihoods of poor rural communitiesor help the nation attain its development goals.

Current land titling initiatives ignore extensive evidence from across Africa (Okoth-Ogendo 1976; Peters 2013, 2016), most notably in Kenya, that individual titling does not achieve the goal of securing tenure, and may even accentuate inequalities among rural communities, with particularly negative impacts on women (Ensminger 1997). Secure tenure alone is not a sufficient condition for improving farmers' incomes; the 'context' is what 'matters' (Lawry et al 2014). As such, instead of focusing on this contested model of individual titling backed by the pro-market organisations, CSOs need to shift focus towards exploring emerging models on how to secure customary rights. Such models include the group CCROs currently piloted by UCRT in the pastoral and hazda communities and rangelands;registration is currently implemented by the Ministry of Agriculture and a number of civil society organisations among the pastoral communities (Flintan 2012). Offering certificate of village land and the overall participatory village land use plans are worth consideration.

[20] Retrieved from http://www.ippmedia.com/frontend/index.php?l=27916

[21]Mwanfupe (2015) Persistence of Farmer-Herder Conflicts in Tanzania, International Journal of Scientific and Research Publications, Volume 5, Issue 2, February

5.4 Gender differentiated employment opportunities

Research across Africa indicates that land-based investments do create jobs, but such opportunities often amount to less than the impacts of direct or indirect displacement caused by such investments in communities. Providing an overall analysis of three case studies of outgrowers, commercial farming and plantation from Ghana, Kenya, and Zambia, Hall, Scoones and Tsikata (2017) concluded that the three agricultural commercialization models affect communities differently and that the outcomes of such investments are context specific. Authors argue that while plantation creates some jobs, such jobs are often limited and of low quality. They further highlight that it is the commercial farming and outgrowing which had significant economic impact at the local level and that within these arrangements there are winners and losers. Dancer and Sulle (2015) findings from the Tanzania's large-scale sugarcane plantation in Kilombero confirm these observations from other African countries. Through a succinct longitudinal analysis comparing employment data gathered in 1992 to those of 2013, authors show that there were many people employed by the company in 1992 than it was in 2013. They found that in 1992 there was a total of 4,008 permanent employees compared 870 employees in 2013.

5.7 Climate change and environmental degradation

Left in the margins in the current discussions and debates about the impacts of large-scale investments is the implications of climate change and environmental degradation to users of various natural resources, particularly land. Studies have confirmed that the recent frequent and less predictable natural disasters such as floods and droughts occurring in different parts of our country are related to climate change and environmental degradation. For example, recent research in semi-arid areas of Tanzania has shown how the changing weather patterns, mostly the increasing temperatures and declining rainfall levels are affecting agricultural and livestock productivity of rural people (Mary and Majule 2009).

Presently, in some parts of Tanzania communities are facing an unprecedented impacts of climate change and land use changes – most of which have been overlooked for many years in the policy making processes. Given the significant impact of climate change and land use change on livelihoods, it is high time that these issues are fully integrated in the country's policy discourse and appropriate measures are put in place. One way of dealing with impacts of both climate change and land use changes is livelihoods diversification strategies among the rural poor attainable through dedicated investments to smallholder farmers, institutional capacity building efforts for the national and local authorities, promotion of conservation agriculture, and research and development.

As such, regarding the country's policy move towards large-scale land-based investments, it is critical to understand what would it mean for rural communities when their resource-base declines amid the increasing woes of climate change? Climate change has far reaching implications for vulnerable groups – mostly those whose livelihood depend on natural resources – that is the hunter-gathers, pastoralists and small-scale farmers. Groups like pastoralists often depend on their common pasture and water resources. The accessibility of these resources also depends on the availability of access routes and security of tenure (Hesse and Cotula 2006) which are narrowing as land is increasingly apportioned for other. Also, as river levels and other water sources keep shrinking due to poor rainfalls and prolonged droughts, pasture land is fast declining. As a result, the production of livestock and the associated dairy products such as meat and milk are also declining (IPCC 2001).

Although climate change affects the national economy and environment at large, it has far reaching implications for vulnerable groups, particularly those that depend entirely on natural resources for their livelihoods. Groups such as the pastoralists and hunter-gatherers are hard hit by climatic changes. Pastoralists for instance, depend on their common pasture and water resources, which also depends on the available access routes and security of tenure (Hesse and Cotula 2006). Shrinking water levels as a result of poor rainfalls and increasing droughts mean fewer pastures and thus a reduced production of key livestock products: milk and meat (IPCC 2001).

In addition to climate change, environmental degradation caused by land use changes needs significant attention, because, left unattended, poor communities will not only face the consequences of natural disasters, but will also be the likely victims of policy shifts. For example, as Martin Walsh (2008; 2012) has shown, although the fundamental cause of land use change in theUsanga and Ihefu valleys were not necessarily pastoralists who were forcefully evicted,but rather it was the large-scale rice farming in the upper streams of Mbarali.

5.8 Emerging trends of land redistribution

In relation to landholding in Tanzania, it is difficult to state exactly how much land is owned by investors, particularly the domestic elites, as such data are not readily available (Locher and Sulle 2013). However, as a result of the government's efforts to attract large-scale investments in agriculture, it is estimated that between 2004 and 2009 about 50,000 hectares of agricultural land were transferred to large commercial investors (World Bank 2010; USAID 2011). Other estimates, however, show that a total area of 145,000 ha has been allocated to various investors and is considered to be part of the concluded deals (Locher and Sulle 2013). The Land Matrix database (2015) shows that 31 land deals in Tanzania, covering about 295,022ha, have been concluded in the year 2015.[22]Again, in June 2017, Land Matrix shows there were 111 land deals in different stages of development.[23]

The USAID (2011) report[24] indicates that there are about 4.9 million holdings of which 90 percent average 1–3 hectares of rain fed land. Most of this land is owned by smallholder farmers who, in some places, surround large-scale plantations which are either 'idle' or 'underutilized'. Therefore, in recent years, especially, under the current government, there are ongoing attempts to redistribute the underutilized land. So far, the President has used his powers to revoke several title deeds. The media has often

[22]More about these deals such as the investor countries can be found at: http://www.landmatrix.org/en/get-the-idea/web-transnational-deals/ accessed on 23 September 2015
[23] Land Matrix: http://landmatrix.org/en/get-the-detail/by-target-region/eastern-africa/?order_by=&more=70
[24]http://www.usaidlandtenure.net/sites/default/files/country-profiles/full-reports/USAID_Land_Tenure_Tanzania_Profile.pdf accessed on 4 March 2016

reported government ministers promising *wananchi*that underutilized farms will be redistributed to citizens as a way to tackle land-based conflicts, particularly conflicts between farmers and pastoralists. Indeed, it seems that President Magufuli's attempts to protect the rights of ordinary people go beyond idle farms. In December 2016, the President ordered a stop to a planned eviction of artisanal miners in Shinyanga Region who were claimed to have invaded an area allocated to a Canadian Mining Company called Acacia (formally known as Barrick Gold). In his order, the President asked, "How do you kick out more than 5,000 people in favour of just one investor? This is unacceptable, and it doesn't even make sense." (Ippmedia 2016).

While the act of revoking a title deed of underdeveloped or idle farm is one of the legal measures provided by the Land Act, No. 4, 1999 (section 48(d)) to ensure resources are redistributed to those who need them and to resolve emerging land-based conflicts, this alone is unlikely to end conflicts. By itself, revoking title deed is unlikely to end conflicts, because of the existing inequalities between the rich and poor (Arndt et al 2015), without sufficient safeguards in place, the poor will still be marginalized in the newly redistributed land.

6.0 Conclusions and recommendations

This report has shown that different forms of land-based investments are in place or are being established in different parts of the country. Such investments are affecting local people in various ways. Through investments which involve partnerships with large-scale processors, there are medium and large producers who are able to diversify from farming activities to off-farm activities as illustrated by sugarcane outgrowers. Those who can diversify are the winners in this kind of a partnership. However, not every farmer is benefiting from large-scale processor and outgrower partnerships. Small producers and newcomers find it difficult to survive in such a partnership as they do not have enough resources to diversify their livelihood strategies. Also, since farmers-processors contracts remain weak, farmers often end up absorbing production and market risks. Therefore, without effective policy, legal and institutional frameworks in place, large-scale land-based investments, even those involving partnerships with small-scale producers, are likely to intensify pressure on existing land users with significant negative implications for such users.

It is thus critical for CSOs, academia, and other public oversight institutions to play a role in supporting the government by providing alternative policy options and narratives critical to shaping country's policies on land-based investments. Without reframing the current initiatives which promote large-scale land-based investments they are likely to shift the direction of agrarian change towards large-scale agriculture. As evidence shows the current large-scale farming is mainly driven by the global capital interested in producing at scale for global markets, unless such markets are restricted by law. Local and national elites welcome these large-scale initiative as they provide opportunities for rent seeking and direct engagement through lease agreements and/or direct accumulation of land. Experience from Great Belt Initiative in Malawi – a similar project to SAGCOT is a case in point. After government of Malawi earmarked the Great Belt Initiative land-based conflicts pitted rural communities against local and national elites who advanced their interests through lease arrangements with multinational corporations (Chinsinga and Chasukwa 2012; Sulle 2016). Hence, the current investments especially in agriculture, livestock and forestry, need to be well planned to ensure small and medium producers target local consumption, and high quality processed export products.

As this report and other research (Hella, Sulle and Kisusu 2014; Coulson 2015; Sulle 2016) have shown, small-scale producers and pastoralists in Tanzania are at the heart of the agriculture sector growth. Small producers need correct policy, legal and institutional frameworks that ensure they can put their natural and human capital into effective and efficient use to earn tangible benefits. The government and other stakeholders thus need to ensure that small producers do not just engage in land-based investments, but fully participate in policy making and implementation processes.

Specific recommendations

To address the current shortfalls in land-based investment governance, CSOs can use several opportunities:

1. **Advocate for the implementation of CAADP's 10 percent budget allocation in agriculture and/or the** Maputo target which required each African state/country to allocate at least 10% of its total budget to agriculture. The compact includes the prioritization of smallholder farmers as the engine of the agriculture sector. While such budget allocation is disputed, because government investment in sectors such as infrastructure benefits agriculture, the current sharply declining agriculture budget in Tanzania is concerning. Because of a lack of serious investment in agriculture and poor farmers, productivity and efficiency remain low. Instead of reversing this trend, some policy makers and or politicians have often argued that small producers are backward and unable to commercialise, hence the need to have large-scale investors, including foreign direct investments to rescue the agriculture sector.

2. **Advocate for full recognition and protection of customary tenure as property.** Amidst the ongoing land reforms ensure that the government recognises and protects customary tenure of land and other natural resources as real and defensible property rights in civil law. These provisions need to meet the requirement in international law that holders of such property rights have the power to provide or withhold 'free, prior and informed consent' regarding any transaction of land and other natural resources that they use through custom.

3. **CSOs need find ways to assess, evaluate, monitor and challenge land-based investments in the country**. To ensure communities and or individual villagers benefit from land-based investments, such investments must be independently assessed, evaluated, monitored and challenged whenever they do not meet contractual agreements with communities or the state. Experience shows that CSOs are instrumental in assisting communities to understand and protect their land rights.

4. **Advocate for alternative business models to large-scale land acquisitions in land-based investments**. Suitable models do not require land acquisition, but

instead involve companies entering into formal agreements or contracts with small producers, be it pastoralist or farmers, to supply their produce for processing or export. These models allow communities to maintain their access and control over land, so that the threats of land grabs are avoided. However, there is no blue print for these models of production.

5. **Provide model contracts to communities entering into partnerships with investors,** whether it is in agriculture, the livestock, tourism, forestry, or mining. Make sure contracts are translated into Swahili, the national language. Contracts must state clearly all the products from which the producers are entitled payments (e.g. sugar, molasses, bagasse, ethanol, etc.). Contracts entered between companies and producers' association or cooperatives must be distributed to all members.

6. **Advocate for transparent and participatory systems to be established** for weighing small-producers produce e.g. livestock to be sold based on their weight and crops based on standardized weights. For producers working on the contract or outgrowing schemes clarify risk-sharing and liability regarding payment delays, *force majeure* events, factory disruptions and the failure to harvest or buy farmers' produce in time.

7. **Ensure the government and development partners rethink the proportion of funding allocated to local and international companies under SAGCOT** to support large-scale commercial agribusinesses and nucleus–outgrower schemes. The current system is likely to benefit. In the KSCL case, it is clear that support for paddy farming is needed alongside specific measures for sugarcane outgrowers. Given that the very smallest and poorest farmers are often unable to participate in outgrower schemes, and that outgrower schemes are in any case limited in the number of farmers they can include, it may be more effective to allocate more effort and funding into broader sectoral development of rural economies through provision of storage, marketing and price support, affordable credit and so on.

8. **Advocate for efficient and effective administrative systems to be established for all land-based investments.** The government must ensure that national land ministries, investment promotion centres and relevant institutions have sufficient and knowledgeable personnel and working tools to improve their effectiveness and efficiency in pre-screening potential investors, negotiating contracts, and monitoring and auditing investment projects in the country. Pre-screening should focus on investors' credibility, financial records, past performance, business model viability, sustainability, inclusiveness, shareholders and track records.

9. **Promote new land tenure arrangements such as short-term leases of 5-20 years and maximum land ceiling** that an individual or the firm can acquire. Government must ensure it strictly states how investment contracts must be negotiated, including the participation of existing land users and legal enforceability of investors' commitments. The state must avoid investment stabilisation clauses that disfavour host communities and countries.

10. **Promote and support the implementation of the existing national, regional and international guidelines on land-based investments**. There is an opportunity for CSOs and likeminded development partners to encourage the

government of Tanzania to domesticate the African Union (AU) Framework and Guidelines on Land Policy in Africa, the AU's Guiding Principles on Large Scale Land Based Investments (LSLBI) and the United Nations Food and Agriculture Organization (FAO) Voluntary Guidelines for the Responsible Governance of Tenure of Land, Forests and Fisheries in the Context of National Food Security. These guidelines contain internationally accepted best practices and the government of Tanzania as an active member of AU and UN, it fully participated in the formulation and adoption processes of these guidelines.

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8.0 Annex 1

The matrix for issues, and the outcomes on **land-based investments** that the LBI-WG needs to **assess, evaluate, monitor and challenge** in the course of the project.

Issue	Indicators for monitoring	Outcome
1. Land acquisitions	All land-based investments secure free, prior and informed consent and ensure the full participation of land users and other relevant stakeholders Adherence to all procedures of land acquisition: from whom and for what type of investments is land acquired for	Improve transparency in land-based investments Raise awareness about the type of investments taking place in the country
2. Compensation	A full, fair, and prompt compensation that address the need to take care of the adverse intergenerational impacts of displaced people	Improve accountability and rule of law Right holders' satisfaction
3. Contracts between processors or buyers and small producers	Partnership contracts written in Swahili rather than in foreign or international languages (often English) Contract legal enforceability is clearly stated including promises offered to communities who have given up their land Investment stabilisation clauses that disfavour host communities and countries are avoided	Enables communities and the country to benefit from land-based investments
4. Markets	The state of markets for agricultural or livestock produce within and outside SAGCOT The state and development partners' invest in supporting markets for agricultural produce	Improved market access and fair prices
5. Infrastructure	Roads, irrigation schemes, storage facilities (warehouses), electrification, and communication systems	Simplified distribution of producers' outputs Improved producer productivity and efficiency Easy access to market and price information

6. Local producers' skills and knowledge	Basic and sector specific education and extension services	Improved capacity of small-scale producers (farmers, pastoralist, artisanal miners, entrepreneurs) in carrying out their livelihood strategies
7. Development models	Land-based investments adopting alternative business models which do not necessarily need large-scale land acquisitions	Leaves small producers to access, control and carry out production on their own, while engaging on trade with processors or buyers
8. Wildlife and forest conservation	Models of benefit and cost sharing e.g. in Wildlife Management Areas, Village Land and Village Land Forest Reserve generate tangible benefits to communities as a reward for their conservation efforts	Improved conservation Increased job opportunities Increased village government revenues
9. Land formalisation	Participatory Village Use Plans Women's land rights Civic education about the benefits and risks associated with land use titles which are also used as a collateral	Strengthen land rights of poor men and women
10. Land Policy Reform	The centrality of small producers in the new National Land Policy (Daft)	Ensure smallproducers rights are fully addressed and prioritized