



Correction (9, February 2014): It came to the attention of the Land Matrix partnership that there was a calculation error in the top ten target country statistics when this newsletter was published in January. Consequently, this newsletter has been updated with revised calculations, as well as altered data that has changed since its publication in January. For further details please contact info@landmatrix.org.

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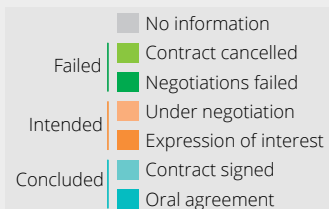
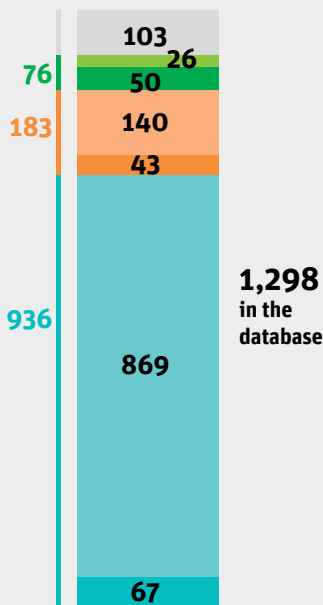


GET THE IDEA

COMPLEMENTING THE GLOBAL OBSERVATORY WITH DECENTRALIZED OBSERVATORIES Fostering transparency at national level and informed local decision making

Overview

Figure 1: Number of deals according to negotiation status
 Data as of 1 February, 2014



The Land Matrix (LM) has successfully provided information and stimulated debate over the last two years on transnational decision-making on Large-scale Land acquisitions (LSLAs). However, its utility in promoting improved decision-making in specific national contexts has remained limited. As socio-political, economic and environmental factors determine synergies and trade-offs between different claims on land, context matters greatly for equitable decision-making. For this reason, the LM partnership has started to expand its focus to support Land Observatories that concentrate on specific national, regional, or topical contexts. It intends to support knowledge platforms that not only overcome the disconnection between local and global levels, but also facilitate collaboration and knowledge exchange between civil society, policy, researchers, and the private sector.

Ultimately, transitions to more sustainable investments is bound to institutional frameworks that embrace different scales. There is therefore still an important role for a

central checking and aggregation of data, and centrally generated and analysed global data sets, which can reinforce dialogue at a national, regional and international level on land investment. The Global Observatory (focusing on transnational data and visualizations) will gradually become one among other Observatories that include: Regional Observatories (such as the one being developed with the Land Policy Initiative for Africa), National Observatories (currently being developed or considered in Peru, Tanzania, Madagascar, Cambodia and Laos, Cameroon), and Thematic Observatories (currently being developed on rangelands). Each Observatory will be relatively independent, owned and managed by its own interest group and visible on its own portal.

“The new Land Matrix portal is a vital source of data on land deals. However, caution must always be applied in interpretation. But the new website provides a much improved guide to types of deal, data source quality, and outstanding uncertainties and potential errors. The database is constantly changing, and always improving, and must be seen as one tool among others – most notably detailed ground level checking in particular places – to understand the complexities of the global land rush.”

Professor Ian Scoones, Future Agricultures Consortium, Institute of Development Studies

FROM OBSERVATION TO INCLUSIVE DECISION-MAKING AND ACCOUNTABILITY

With this transformation, the LM is thus moving from ‘observation’ to ‘**evidence-informed, inclusive decision-making and accountability**’. First experiences by the LM partnership reveal that this will add value as follows:

- On the one hand, these complementary knowledge platforms covering geographic or thematic contexts are key to **improve and complement the LM databases** through first-hand knowledge and grab the essence



and specificities of each large-scale investment project. Conversely, local tools need to link their information to a global perspective, as trans-national processes are an important feature of the phenomenon and must be accounted for in national debates.

- On the other hand, creating observatories as multi-stakeholder knowledge platforms can open up **space for dialogue** on managing conflicting land claims. The LM aims to provide tools for widening stakeholder involvement in making data available and understandable. By making stakeholders both data providers and knowledge bearers the LM aims to promote transparency and accountability.

Over time, the LM partnership will become a **support-network**, enabling local organizations to successfully implement, manage, own, and use Land Observatories according to their needs. The LM partnership intends to **nurture open data and open source communities** focused on land deals, by opening the software for developers to contribute to and improve its codebase. The LM is ultimately an attempt to contribute to embracing **a new development paradigm** towards open (data) development and governance.

The LM will be transformed into an initiative that:

Will **facilitate the development** of partner-owned national, regional or thematic observatories for collection and use of data for improved decision-making, including sharing of experiences and best practice

Will **ensure the sustainable maintenance and improvement** of the observatory application by openly sharing the tools with wider community of civic developers who innovate new capabilities and uses

Will **make relevant information on land deals globally accessible**, which informs and widens global dialogue and frameworks for good land governance



GET THE DETAIL

DATA TRENDS: ONGOING DEMAND FOR LAND

The efforts to improve the scope and quality of the data in the Land Matrix Global Observatory continue. Since the last newsletter in June 2013, new transnational deals have been added and previous information has been updated.

Table 1: Projects according to negotiation status

INTERNATIONAL LAND ACQUISITIONS ACCORDING TO NEGOTIATION STATUS			
	Number of cases	Intended size (in million ha)	Size under contract (in million ha)
Oral agreement	67	4.9	2.6
Contract signed	869	53.9	33.1
Concluded deals	936	58.8	35.7
Expression of interest	43	5.4	n.a.
Under negotiation	140	8.8	n.a.
Intended deals	183	14.1	n.a.
Negotiations failed	50	5.3	n.a.
Contract cancelled	26	n.a.	1.8
Failed deals	76	5.3	1.8

Data as of 1 February, 2014

In particular, we take stock of

- **181 new deals** in the category “concluded deals” that now stands at 936 concluded deals.
- **38 new deals** in the category “intended deals” that now stands at 183 intended deals.
- **26 new deals** in the category “failed deals” that now stands at 76 failed deals.

Changes in aggregate summary statistics by negotiation and implementation status could be due to new deals in the database or because deals changed their status. For instance, a deal that was only intended in June last year might have since become a concluded deal or it might have failed.

In terms of aggregated sizes, concluded deals amount to a total of 35.7 million hectare of area under contract (with announced intentions of 58.8 million hectare). Concluded deals have thus increased by almost ten per cent



from 32.6 million hectare in June 2013. The database currently has intended deals that cover an area of 14.1 million hectare (compared to 10.8 million hectare in June 2013). A significant increase can also be reported for failed deals (from 4.8 to 7.1 million hectare).

DYNAMICS: IMPLEMENTATION ONGOING BUT STILL SLOW

Compared to the last newsletter, we find that more deals are operational with 105 deals in the startup phase (as compared to 69 in June 2013) and 463 deals in operation (as compared to 323). These deals that have at least started to become operational account for land area under contract of almost 17 million hectare. Yet, still only 4.3 million hectare is actually under production, up from 1.7 million hectare in June 2013.

Table 2: Projects according to implementation status

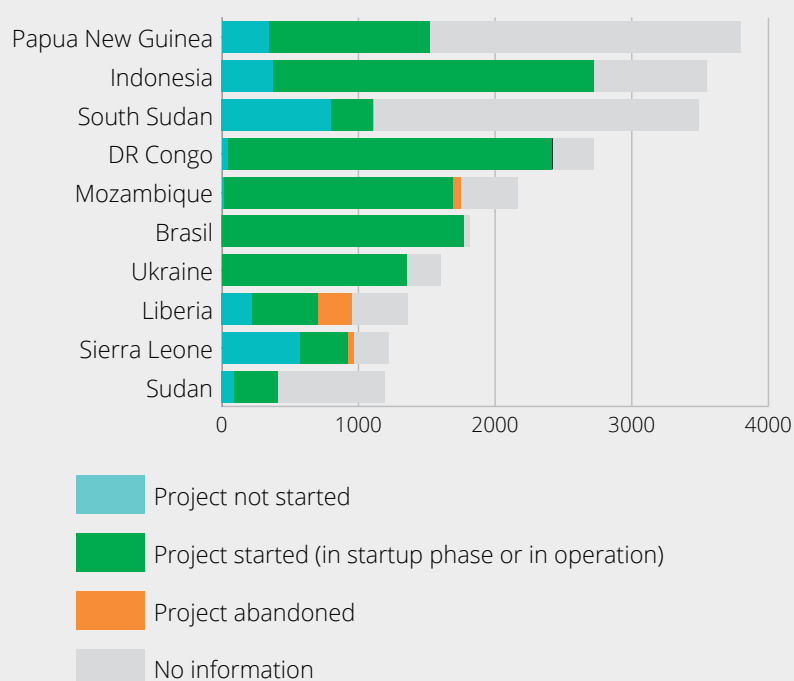
INTERNATIONAL LAND ACQUISITIONS ACCORDING TO IMPLEMENTATION STATUS			
	Number of concluded deals	Size under contract (in million ha)	Current size under production (in million ha)
Project not started	53	2.8	n.a.
Startup phase (no production)	105	3.1	n.a.
In operation (production)	463	16.9	4.3
Project abandoned	31	1.4	n.a.
No information	284	11.5	n.a.
Total (deals or ha)	936	35.7	4.3

Hence, implementation remains rather slow, but may gain momentum, as the sharp increase in area under production may indicate. Note, however, that information on the implementation status is still missing for a major portion of the deals and that information on the current size under production is subject to rapid changes and may thus be inaccurate.

Data as of 1 February, 2014

TARGETS AND FORMER LAND USE

Figure 2: Top 10 target countries – Concluded international land acquisitions according to implementation status (in 1000 ha)



Looking at the top 10 target countries, we find the same countries as in the last newsletter with minor changes in the order. New-comers are Brazil and Ukraine – the first South American respectively Eastern European countries among the top 10 – that replace Ethiopia and Madagascar (now on place 11 and 19 respectively). The two countries with the largest areas under contract are Asian countries (Papua New Guinea and Indonesia), followed by three African countries.

Most land targeted was (or is) used for agricultural purposes. For about 40 per cent of the deals (81 cases) with information on former land use land is/was formerly under smallholder agriculture and for over a third of the deals (75 cases) land was formerly under commercial agriculture. Thus, competition over access to land is increasing. Also, we find 34 deals that were (or are) used for forestry and 6 deals that were (or are) used for conservation. Hence, investors also target land used for ecosystem services.

Data as of 1 February, 2014



Table 3: Former land use of projects

FORMER LAND USE	Number of concluded deals	Size (in thousand ha)
Commercial (large-scale) agriculture	75	3,661
Smallholder agriculture	81	1,423
Pastoralists	6	464
Forestry	34	2,117
Conservation	6	152
Total	202	7,817
No information	734	27,857

Data as of 1 February, 2014

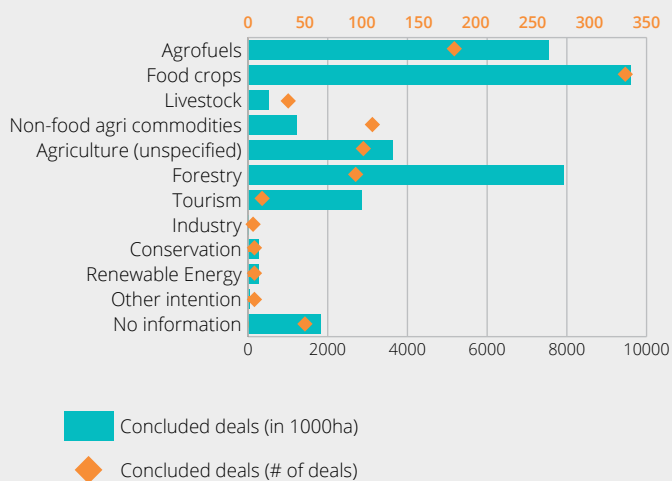
“L’Observatoire Foncier du Cameroun suit et promeut la mise en débat et transparence des investissements foncier à grande échelle. Nous collaborons pour cela avec la Land Matrix afin d’avoir accès à certaines informations et pour les rendre plus précises et dynamiques.”

(Olivier Iyebi Mandjek, Observatoire foncier du Cameroun)

“The Land Observatory of Cameroon promotes transparency and monitors large-scale land based investments. For this, we collaborate with the Land Matrix, in order to have access to information on one hand, and on the other to make this information more precise and dynamic.”

DRIVERS OF LARGE-SCALE LAND ACQUISITIONS

Figure 3: Main drivers of concluded large-scale land acquisitions



Data as of 1 February, 2014

The main drivers of land-acquisitions in our data base are related to agricultural production with the cultivation of food crops being the most important investment intention with 331 concluded deals amounting to a contracted area of 9.6 million hectare. Of these, 233 projects have started production on 5.2 million hectare (contract size, not actual production). The second most important driver are biofuels with 183 deals on 7.5 million hectare of which 119 projects have started production on 4.0 million hectare. Non-food agricultural commodities make up 110 deals of which 54 are operational. The majority of these deals are rubber plantations (60 per cent) but they also comprise cotton and products for the cosmetic industry (e.g. palm oil). 34 projects concentrate on livestock, all of these are operational. Besides agriculture, forestry (92 deals of which 78 deals have started production) and tourism (12 deals of which 7 are operational) can be identified as drivers. For 53 cases, we have no precise information on the intention of the investment.



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Visit the website

Visual summaries that provide insight about the phenomenon, and direct access to the dataset for in-depth exploration and analysis.
www.landmatrix.org

Help us grow

The Land Matrix data depends on the contributions of all. To enhance the data, visit www.landmatrix.org/get-involved or write to data@landmatrix.org

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