***ASSESSMENT STUDY ON LARGE SCALE LAND BASED INVESTMENTS IN AFRICA***

***EAST AFRICA REPORT[[1]](#footnote-1)***

**EXECUTIVE SUMMARY**

Over the last few years there has been an increase in large scale land based investments (LSLBI) in East Africa. This assessment study reviewed LSLBI in 7 of the 10 countries in the region. The land brought under LSLBI amounts Land investments are concentrated in Ethiopia and Kenya, while South Sudan has the largest land mass under LSLBI.

Foreign investors originate from a range of developed economies as well as from emerging economies. These investors include multinational and private companies. In rare instances, governments act as investors. Investors were also domestic. However, the larger LSLBI are implemented by foreign investors.

Investment in land is driven by long-term trends such as growing consumption of food and fuel resulting in the need to ensure secure access to food and non-food (biofuel) crops in investor countries. The agricultural activities on land secured for large scale investments are largely for export purposes.

While countries in the region can benefit from foreign direct investment, risks associated with LSLBI emerge for consideration and mitigation. There is need for LSLBI should take into consideration the human, social and economic rights of local communities. Negative impacts on the land rights and livelihood security of local and adjacent communities should be avoided by revisions to policies or through the enforcement of policy provisions intended to protect these rights. Good practice can be seen in countries such as Tanzania and South Sudan where policies to set limits on lease periods for foreign investments have been enacted. More concerted efforts is required in the implementation of requirements for investors to conduct prior environmental and socioeconomic studies, requirements for prior community consultation and safeguarding community rights in the context of investments.

On the whole, stronger action is required to improve the governance of LSLBI. Improved governance is required in the negotiation of LSLBI, their implementation and in the sharing of proceeds from LSLBI. Contracts should be transparent and made available for public scrutiny. There is need for contracts to incorporate legally binding social and environmental commitments and accountabilities.

Improved, empirical documentation and monitoring of investments are important for improved transparency and improved analysis of LSLBI and their impacts. Increased accountability for practices and approaches which promote environmental sustainability and which reduce loss of biodiversity and the emergence of crop monocultures are also key.

**1. BACKGROUND**

Land is of primary importance to the livelihoods of people in East Africa. Although East Africa has the lowest per capita agricultural incomes, agricultural production, and food production compared with Southern and West Africa, agriculture remains the economic mainstay of the region with heavy reliance on environment and natural resources. Nearly 80 percent of East Africa's people depend on agriculture for their livelihood. Agriculture makes up 40 percent of the sub region’s GDP.[[2]](#footnote-2) In addition to being a source of employment, the sector is also a large foreign exchange earner as it sources 70% of exports to the European Commission by Kenya, Tanzania and Uganda.[[3]](#footnote-3) Mining is also an important contributor to GDP. Hence, these two land based sectors together contribute the greater share of growth in East African economies as indicated in Figure 1.[[4]](#footnote-4)

**Figure 1: Sectoral contributions to GDP in East Africa**

Despite its abundance in natural resources, the region experiences a number of challenges which have had the effect of stunting their economic growth and worsening underlying food insecurity. These include recurring and severe droughts and other natural disasters, conflict, drastic climate change. As a result, some countries in the region are characterized by recurring famine and vulnerable livelihoods (see Annex 1).

In spite of the importance of agriculture to African economies, most countries suffer from decades of under-investment in agriculture evidenced by stagnant productivity and poor growth in the sector. In April 2011, the 5th NEPAD-OECD Ministerial Conference heard that on average, African countries allocate only 4% of their budgetary expenditures to agriculture, compared with up to 14% in Asia.[[5]](#footnote-5)

In the 1980 and 1990s countries in the region went through structural reforms intended to streamline their economies. Salient features of these processes included profound impact on the agricultural sector, including privatization, disinvestment or outright elimination of many of the public policies and institutions operating within the agricultural sector. In some instances, public agricultural institutions were abolished because they were thought to constrain private sector development and poverty reduction for instance, marketing boards. Others were removed out of concerns over their inefficiency, their drain on public resources and their adverse impact on macroeconomic stability for instance input subsidies. Public spending on agriculture declined . However, so did net taxation of the agricultural sector. The outcomes of this wave of restructuring has been mixed. Agricultural productivity growth has risen in many countries, but from very low levels, and generally not at speeds sufficient to bring about the kind of rapid economic development achieved by Asia’s Green Revolutions. In Uganda, for example, growth in agricultural GDP per capita averaged just 1.6% per annum from 1989 to 2006.[[6]](#footnote-6)[[7]](#footnote-7) Consequently, countries in the region face the challenge of improving the productivity of their agricultural sectors.

**Concerns over agriculture**

In recognition of the importance of investing in agriculture and rural development, African Heads of State have taken various steps to increase support for agriculture. In 2003 under the Maputo Declaration on Agriculture and Food Security, States committed to allocate at least 10 percent of national budgetary resources to agriculture and rural development policy implementation within five years. In addition, under the framework of the Comprehensive Africa Agriculture Development Programme (CAADP),[[8]](#footnote-8) African States have called for annual agricultural growth rates of 6%.[[9]](#footnote-9) They have committed to increase food and agricultural trade within Africa and harmonise fertilizer policies to reduce procurement costs.

Progress towards the 10% Maputo target has not been even. Available data suggests that the declining trend in agricultural expenditure was partially reversed in Africa as a whole after 2003, recovering to 6.4% in 2003-2009, nearly the same as in 1990-95, but still well below the target. However the regional average for East Africa was above the 10% target as the result of the establishment of policies to foster agricultural growth, trade and food security at national levels, but also regional trade policies and harmonized regulatory frameworks.

**Growing Foreign Direct Investment**

Many African countries still rely on donor support or Official Development Assistance (ODA) to boost investment in their agricultural sectors. However, ODA for the agricultural sector has lost share of overall aid over time, decreasing from around 15% in the 1970s to around 5% in 2007. At the same time, the last decades have witnessed significant increase both in domestic capital and in the inflows of FDI to developing countries, including African countries. In many cases the gap between domestic savings and the desired level of investment is filled by external resources, FDI being one of the most significant. In the 1990s, FDI represented around 30% of total investments increasing substantially to 50% by 2010.[[10]](#footnote-10)

FDI offers many advantages including development of infrastructure (irrigation and drainage systems, roads), modernization, improved technologies and productivity, job creation and improvement of incomes. LSLBI as a form of FDI are frequently accompanied by promises of similar advantages accruing to beneficiary countries; rural job creation, improvement of rural incomes, self-sufficiency food security and development of agricultural value chains.[[11]](#footnote-11)

The Food and Agriculture Organization (FAO) has projected that an additional 1.6 billion hectares of arable land primarily from Africa and Latin America will be required to feed an additional 2.3 billion people by 2050[[12]](#footnote-12). Accordingly, a dramatic spike in LSBLI has been seen. Since the 2008, which coincided with the food and financial crises, over 35 million hectares having reportedly been sold, leased or contacted to foreign governments and both domestic and foreign entities, globally.[[13]](#footnote-13) Most of these LSLBI have been recorded in Africa, Central Asian and South America.

The purpose of this paper is to present an assessment report of LSLBI in East Africa with the view to contributing to the growing knowledge base and to identifying good practices for future LSLBI. The assessment study includes 10 countries in the region: Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Rwanda, Somalia, Tanzania, and Uganda. This assesses LSLBI in study is part of a broader continental wide assessment. The broader assessment includes a component on the gender implications of LSLBI. The detailed gender implications of LSLBI are therefore beyond the scope of this paper. Nevertheless, in view of the well-established rationale for prioritizing gender issues in agriculture, some key gender implications of LSLBI in East Africa will be highlighted.

**2. DRIVERS OF LSLBI**

An overview of the LSLBI reviewed is provided in Annex 2. This assessment study observed that the vast majority of LSLBI were for agricultural purposes (including floriculture and horticulture). This applied to 130 of the 142 projects reviewed (5,297 642ha of the 7,308 838ha concerned). The remaining project focuses on mining, tourism and forestry.

**2.1 Food security**

Food security concerns are a key driver of LSLBI in Eastern Africa. To be food secure, many developed and emerging economies have decided not to depend on volatile global markets for key foods, but have opted for more direct control over food production. Such countries have tended to avert the challenge of insufficient arable land within their national boundaries by simply acquiring this land elsewhere, producing the food there and shipping it home.[[14]](#footnote-14) As much as 39% of the 142 land deals investigated were specified as being food related.

The highest and largest numbers of land deals were for biofuel crops produced alongside other crops.[[15]](#footnote-15) In Ethiopia, the Indian firm Karuturi Global leased over 111,700 ha of land for the cultivation of oil palm, rice, maize, vegetable and other commercial crops.[[16]](#footnote-16),[[17]](#footnote-17) In Tanzania, UK and Northern Ireland’s CAMS Group leased 45,000 ha for the production of sweet sorghum. Hence while millions of people in East Africa are food insecure,[[18]](#footnote-18) both these firms, as do most investors, export a larger share of the produce from LSLBI back to their home countries while supplying smaller amount to the domestic market in host countries. Currently, there is no law in Ethiopia to ensure that a certain percentage remains in the country[[19]](#footnote-19).

**2.2 Biofuel production**

Global demand for energy continues to grow exponentially. Developed countries, in particular those from the European Union, aim to incrementally grow the proportion of their transport fuel usage from renewable sources. Governments all over the world including those in China, India, Brazil, the US and the EU have enacted mandatory targets for use of biofuels in transportation fuels. In this way guaranteed markets for biofuels have been created.[[20]](#footnote-20)Key factors responsible for this trend include concerns about energy security given the prospect of the inevitable depletion of fossil fuels and concerns about greenhouse emissions. Given high land prices and the lack of available land within developed and emerging countries, these aspirations must inevitably be fulfilled through imports. Consequently, the general trend is that of production in developing countries to supply overseas markets, most notably in the European Union and China.[[21]](#footnote-21)

Biodiesel is produced from *jatropha curcas*, croton *megalocarpus, ricinus communis*, cape seed, cotton seed, and oil palm and sunflower plants. The majority of these large-scale biofuel projects observed in Eastern Africa were *jatropha curcas* plantations followed by oil palm, cotton seed and sunflower (see Annex 2).

**2.3 Extractive Industries**

Historically, the production of petroleum or gases, and the mining of metals and precious stones has not taken precedence in East Africa. This assessment study observed relatively few (only 9%) LSLBI focusing on extractive industries. These included forestry projects in Uganda and Tanzania and mining LSLBI in Somalia.

However, extractive industries have been growing in their importance. For instance, recent discoveries of gas and uranium and gold mining have added to existing exploitation of non-renewable natural resources like minerals like Tanzanite, diamond, uranium and fossil fuel in Tanzania. Similar finds of oil in Somalia and Uganda have also contributed to a growing significance of extractive industries in these countries. In this way in recent years a dramatic acceleration and expansion of mining into new land and territories has been seen.

Factors underlying this shift include the 2008 collapse of financial markets which led hedge and pension funds to increasingly target ‘tangible’ commodities such as metals, minerals, oil and gas, driving up prices in the process. The rapid increase in throwaway “upgrade” culture in new technologies has also been responsible for driving a steady increase in mineral extraction.[[22]](#footnote-22) Energy and metal prices have reached record levels in the last decade. Demand for raw materials BRIC countries (Brazil, Russia, India, China) is primarily driving this trend. With the increase in the worldwide population (expected to reach 9 billion by 2050), the growing purchasing power of Asia and Africa’s middle classes and the urbanization of the world, the demand for natural resources is now moving at breakneck speed. Estimates indicate that if countries maintain their per capita resource consumption and developing countries catch up with them, global annual resource extraction would triple by 2050. This trend is reflected in levels of large scale investments related to extractive industries.[[23]](#footnote-23)

**2.4 High returns**

African agricultural land is cheap compared to similar land elsewhere (see World Bank Study in Annex 3). Conditions such aslow land rentals and cheap labour create an attractive environment for foreign investors who are then able to maximize their returns from LSLBI. This assessment study observed that States have frequently leased land for even less than the minimum level of $ 100 indicated by the World Bank study. Of 21 land deals analyzed in Ethiopia, the average value of land per hectare was 185 Birr ($13) per ha.. In line with the policy to offer incentives to investors, land has been leased for as low as 20 Birr (about $1.44) per hectare, as in the case of Karuturi Global’s 100,000 ha land lease. In Tanzania, government was involved in negotiating a land deal for over 300,000 with AgriSol for only $ 0.13 per ha.[[24]](#footnote-24) The study observed that is some cases, further discounts are awarded to investors. For instance Rwanda offers further discounts on rentals if investors provide the domestic market with up a certain proportion of their produce.[[25]](#footnote-25)

On their part, countries in the region promote LSLBI in anticipation of high developmental returns for themselves. For instance, South Sudan, one of the least developed countries in the world, is reported to have embarked on a policy of promoting LSLBI in order to address its developmental challenges following years of conflict.[[26]](#footnote-26)

**3. UNDERSTANDING LSLBI**

**3.1 What is the nature and motivation of LSLBI in the region?**

The assessment study cannot be said to have been exhaustive in identifying all LSLBI in the region. Nevertheless, study was able to identify prevailing trends. LSLBI in East African States are primarily established for agricultural purposes over 91% of deals involving approximately 71% of the land acquired for observed LSLBI. Other minor sectors include forestry (5% of LSLBI projects; mining 1.4% of projects and tourism (less than 1% of projects reviewed but comprising 25.6% of the hectarage under consideration).

The study also assessed the size of the LSLBI projects in the region (Figure 2). The majority of land investments (close to 80%) were under 50,000 ha. This category of LSLBI accounted for only 17% % of the land held under LSLBI. On the other hand while only 4% of land investments observed were very large, i.e. over 300,000ha, these projects amounted to over 52% of the land held under LSLBI. Of these very large LSLBI, 60 % were in South Sudan and the rest in Ethiopia.

The assessment study identified an emerging trend to limit the size of land leased to investors. Media reports indicate that as of January 2013, Tanzania begun to place a ceiling on the amount of land that can be leased to both foreign and local single large-scale investor for agricultural purposes.[[27]](#footnote-27) Similarly, although no specific policy changes have been effected, two years ago, a senior Ethiopian official from the Ministry of Agriculture’s Land Investment Support Directorate, Esayas Kebede, commented on government’s decision to reduce the amount of land to 100,000 hectares, only a third of what the Indian group was so receive.[[28]](#footnote-28) As per the agreement signed with Ethiopia’s Ministry of Agriculture, Karuturi Global was to lease 100,000 hectares of land in Gambela, with an option for an additional 200,000 hectares.[[29]](#footnote-29)

LSLBI in the region are established primarily for cash crops. This assessment study observed that biofuel crops are the leading sectoral driver for LSLBI. Of the 139 investments reviewed, 44 projects (approximately 32%) were involved in the cultivation of crops which can be used for biofuel production. The primary biofuel crops is jatropha. Food crops were grown on The primary food crops include sugar cane, sesame, groundnuts, fruit and soybean. Other cash crops include cotton and flowers. Extractive industries (primarily mining and forestry) are another driver of LSLBI.

**Figure 2: Size distribution of LSLBI Projects in East Africa.**

**3.2 Where are LSLBI Taking Place?**

Ethiopia was the primary investment destination in the region. Ethiopia emerged as the primary destination for LSLBI. The magnitude of documented acquisitions is equivalent to up to 42.9% of the total area considered potentially available and suitable for agriculture.[[30]](#footnote-30) The assessment study observed that Ethiopia attracted the largest number of deals. Approximately 59% of LSLBI projects reviewed were from Ethiopia, followed by Kenya which attracted 11.5% of the deals observed. South Sudan and Tanzania received similar investment levels at approximately 11% of projects However, South Sudan contributed the most land to LSLBI, accounting for 3,332 030ha (approximately 49%) of the land under LSLBI. LSLBI in Ethiopia accounted for approximately 31% of the land observed to be under LSLBI in East Africa.

There were no LSLBI observed in Burundi, Comoros, Djibouti, Eritrea Sudan. While these are mostly small states, a study of LSLBI in Sub Saharan Africa established that generalisations should not be made about to the factors that shape a country’s attractiveness as a farmland investment destination. That study found no correlation between the area of land acquired for LSLBI and country’s surface area, or with the area of available agro-ecologically suitable. For example, countries with relatively small surface areas and scarcity of suitable land (e.g. Ghana, the Republic of the Congo and Liberia) were found to have become key recipients of LSLBI while other countries with abundant reserves of land (e.g. Angola and the DRC) were not become major investment targets.[[31]](#footnote-31)

A contributing factor to this incongruency could be the proportion of arable land. Hence, while a country like Rwanda is relatively land scarce, a higher proportion of its land is arable than that of a larger country such as Angola, making them more likely investment destinations. Finally, countries with government commitment towards developing commercial agriculture – reflected particularly in the institutional support and incentives afforded to foreign agricultural investments – are also more likely investment destinations.[[32]](#footnote-32)

**3.3 Who is investing?**

This assessment study reviewed 139 LSLBI deals across the East Africa region and observed that investors are both foreign and domestic. In Ethiopia, of the 82 deals examined 61% involved foreign investors, while in Kenya approximately 63% of LSLBI deals were supported by foreign investors. Of the foreign investors no one particular nationality contributed the majority of foreign investors. investors in LSLBI in East Africa are drawn from a range of investor countries. Investors were predominantly from Europe, including Austria, Germany, France, Bangladesh, Belgium, Italy, Netherlands, Norway, Sweden and the United Kingdom. These were followed by investors from Asia; China, India, Korea, Maldives, Pakistan, Singapore and Turkey. There are also investors from the Middle East (Lebanon, Qatar, and Israel) as well as North America (Canada and the United States of America).

It was noteworthy that while Asian investors play an important role, China (2 deals observed, one agricultural one in Ethiopia and a titanium mining one in Kenya[[33]](#footnote-33)) does not emerge as a dominant investor LSLBI in East Africa. This is in stark contrast to how China is often portrayed as a key actor in LSLBI. An explanation for this could be that that China is predominantly active in LSLBI linked to mining[[34]](#footnote-34), of which there are not many in the region.

The emerging trend from the assessment study was that while both domestic and foreign investors were significant. Foreign investors tended to be involved in larger LSLBI. All the very large LSLBI (above 300,000 ha were developed by foreign investors. Similarly all the large LSLBI (100,000 – 299,999 ha)) were run by foreign companies. Interestingly the although investors from the USA were not numerous, they tended to hold very large investment projects. Hence of the 5 LSLBI above 300,000 ha, three were implemented by American companies. Hence, in Ethiopia, for LSLBI under all domestic investors were involved in the smaller LSLBI of 20,000ha and less. The only exceptions were projects in which domestic investors were in partnership with foreign investors. Literature sources indicated that in general, domestic investors use more basic technologies, have smaller farm sizes, are quicker to begin their operations, are likely to employ more workers per ha of land (due to technology used). On the other hand, domestic investors were said to have less capacity and experience than their foreign counterparts and more likely to experience crop failures.[[35]](#footnote-35) In fact, this assessment study reviewed observed that during the negotiation of LSLBI, would-be investors are not required to establish their capacity to implement the proposed project. This assessment study reviewed 19 lease agreements for LSLBI. None of them included a requirement for the investor to demonstrate the capability to successfully implement the proposed project.

In Rwanda and Uganda investors were predominantly foreign. A similar trend was observed in Tanzania. However, in Tanzania there were a few cases where domestic investors entered into partnerships with foreign investors.

The study also observed that foreign investor companies were primarily private owned. There were very few instances of countries investing in LSLBI. For instance investments in Ethiopia by Djibouti and Egypt.[[36]](#footnote-36) However this was not a frequent trend.

**3.4 How are LSLBI being negotiated?**

There are several mechanisms through which LSLBI are conducted. Investments can be achieved through long term leasing, other concessions or the outright sale of land. Analyses of the mechanisms through which LSLBI are effected is usually hampered by limited access to actual documentation (lease agreements etc.) of the investment projects. Of the 139 projects reviewed by this study, only 19 lease agreements were secured for analysis.

This assessment study observed that investments are generally negotiated between investors and government departments or institutions. There was no evidence of LSLBI being negotiate with private individuals. This observation is supported by observations by other works.[[37]](#footnote-37) The study observed that LSLBI are usually effected through long-term leases ranging from 25 year and in some cases, up to 99 years in duration. This assessment study also observed that LSLBI are also sometimes established through concessions. The study did not observe outright land sales. The Kabuye Sugar Works mill in Rwanda is a good case in point. Having initially been established by a Chinese company in 1976, the mill became State but production was disrupted after 1994 leading to the closure of the mill in 1996. The government subsequently sold the factory to a private foreign investor, the Ugandan-based Madhvani Group. While the mill was sold, the land associated with the project, some 3,100 hectares of land, was transferred to Madhvani in the form of a 50 year lease.[[38]](#footnote-38)

The assessment study observed some trends pertaining to the content of the agreements governing LSLBI. Firstly, contracts generally left the issue of benefit sharing between the investor companies and adjacent communities to the discretion of investors. Secondly, monitoring frameworks were generally very weak. For instance, in the case of the contract documents evaluated (these were mostly from Ethiopia), the agreement did not enunciate a detailed monitoring framework. The contracts simply stated that confirmed the right of the Lessor to ‘monitor and establish the fact that the lessee is discharging and accomplishing its obligations diligently.’ Yet under the same contracts, issues relating to social and environmental impacts and the obligations of the investor in this regard, were generally not highlighted.

A third observation was that none of the contracts reviewed made provisions for the resolution of conflict between investors and adjacent communities. This effectively absolves investors from any accountability in this regard. Contracts did not require investors to consult nor to make disclosures to local communities regarding the conduct of LSLBI operations. In the case of the Tiomin deal in Kenya, one commentator surmises that such approaches place LSLBI in breach of the country’s laws in that the Mining Act as well as the Environmental Management and Coordination Act require public participation in decision making on such issues.[[39]](#footnote-39)

The assessment study observed that in some cases, foreign, private investor firms receive funding from local banks in support of LSLBI. For instance in Ethiopia, a Pakistani secured a loan from the Commercial Bank of Ethiopia to develop 70,000 ha leased by the company in Oromia Regional State for a sugar processing venture.[[40]](#footnote-40)

**3.5 Policy Basis for Investment**

This assessment study examined the legal basis for investments in land. Table 1 provides an indication of some policy initiatives undertaken by countries in the East Africa region to promote LSLBI.

In the case of Ethiopia, the key enabling legislation for investment in Ethiopia isProclamation 280/2002 (and amendments in 375/2003) which outline various laws and policies related toinvestment. In addition to such underlying provisions, efforts to establish legal provisions to promote LSLBI have emerged. There was a significant shift in the way lands are allocated to foreign investors in 2009. Prior to this, each regional government was responsible for all foreign and domestic land investment. However, with the passing of Proclamation 29/2001*,* the federal government became the entity responsible for all aspects of foreign land investment for all lands over 5,000 ha.[[41]](#footnote-41)

**Table 1: Policy Initiatives and Processes Implemented in Support of LSLBI**

|  |  |  |
| --- | --- | --- |
| **Country** | **Processes in Support of LSLBI** | **Additional measures in order to promote FDI** |
| Ethiopia | PROCLAMATION 280/2002 -(and amendments in 375/2003) outline various laws and policies related to investment.  PROCLAMATION 29/2001 *–* improves efficiency in the of approval of LSLBI by transferring authority for approving acquisition of lands over5,000 ha from regional governments to the federal government  AGRICULTURAL DEVELOPMENT-LED INDUSTRIALIZATION STRATEGY focuses primarily on expansion of large-scale commercial farms and improved productivity in smallholdings. |  |
| Kenya | KENYA INVESTMENT AUTHORITY – promotes and facilitates investment by assisting investors in obtaining licenses, leases and securing other assistance and incentives  LAND CONTROL BOARD – approves all applications for land by investors after approval by DISTRICT LAND BOARDS. | * Whole investors required to carry out and submit environmental impact assessment reports to the National Environmental Management Authority, if within 9 months no reply is received, the investor may proceed with the project. * Central Bank of Kenya – Permits investors to remit proceeds from their activities. No exchange controls. * Investors in export processing zones may enjoy a 10 year tax holiday followed by reduced tax rates for the following 10 years. * No tax payments for investors involved in oil exploration and production |
| Rwanda | 2005 LAND LAW - Aims to encourage more intensive forms of agriculture to supply new markets.. Brings all marshes and river valleys under State control as part of a new legal framework that provides incentives for investors to exploit such land commercially.  INVESTMENT LAW - aims to facilitate procedures for investors and provides incentives for investors, guarantees for the protection of foreign investments and stipulates that the only way for the Government to acquire rights over the investment is by following established expropriation procedures; in this case, adequate compensation will be paid in foreign convertible currency within 12 months. | * Incentives for investors include a number of tax breaks (notably on VAT and income tax). |
| Somalia | COMMITTEE ON FOREIGN INVESTMENT – centralises issues to do with investments, facilitates the investment approval process and authorizes investment projects. | * No restriction of repatriation of profits |
| South Sudan | 2009 LAND ACT – Section 15 allows communities to allocate land for investment purposes in line with the interests of the community  INVESTMENT PROMOTION ACT 2009 -  Articulates procedures for  certifying and licensing foreign investors to operate in South Sudan, including setting limits on the duration of foreign investments  LOCAL GOVERNMENT ACT 2009 -  Provides for local land committees which are responsible for mediating between communities and investors during lease negotiations between the community and other investors.  AGRICULTURE POLICY FRAMEWORK 2006 promotes the allotment of large plots of uninhabited farmland to private investors for commercial agriculture | Investors are also allowed the:   * Right to trade and profit from any resulting carbon credits from timber on the leased land * Right to engage in agricultural activities, and to exploit petroleum, natural gas, as well as other minerals * Right to sublease any portion or all of the leased land to third parties |
| Tanzania | “KILIMO KWANZA” (Agriculture first) Policy Encourages large scale agricultural initiatives. Under this initiative, the government aims to increase general land to about 20% for large scale agriculture  TANZANIA INVESTMENT CENTRE –  A one-stop center for investors. TIC co-ordinates, encourages, promotes and facilitates investments in Tanzania. Facilitates investment speedy processes for investors:   * acquisition of land * Meeting of all legal requirements   SOUTHERN AGRICULTURAL GROWTH CORRIDOR - set up to attract and involve investors and promote agribusiness. A key avenue for LSLBI. | Additional measures include:   * Low land rentals * land title where ownership of land title is generally prohibited for foreigners * award of strategic investor status to assure availability of incentives for investors (tax holidays, repatriation of dollars out of the country, waiver of duties on diesel, agricultural and industrial equipment and supplies) * Large companies awarded “strategic investors” status given additional incentives, including exoneration of the 30 percent corporate tax on profits |
| Uganda | UGANDA INVESTMENT AUTHORITY - A semi-autonomous government agency whose role is to promote and facilitate investments in Uganda including lands leases.  THE UGANDA CARBON BUREAU - provides carbon credits to private companies in exchange for planting trees. |  |

There are instances where the stated policies and practice on the ground differ as observed in South Sudan. Recently established in 2005, the State of South Sudan is still in the process of establishing itself as a state. While laws covering a range of issues have been enacted, gaps in the regulatory framework are apparent. Hence, laws are sometimes poorly disseminated and under-enforced. This has been observed to be the case with respect to LSLBI. For instance, the Investment Promotion Act lays out the procedures for certifying and licensing foreign investors to operate in South Sudan. It explicitly limits foreign investments in agriculture and forestry to renewable terms of 30 and 60 years, respectively. However, due to poor awareness of this law, government have proceeded with the issuing of 99-year leases to foreign investors for agriculture and forestry investments.[[42]](#footnote-42)

Creating enabling policy environments is but one of the incentives put in place by governments to promote LSLBI. Governments in the region have also articulated other incentives. Fiscal incentives include duty exemptions, full or partial tax holidays, or tax rate reductions for specific types of activities. Non-fiscal incentives include allowance of expatriate employment and remittance of profits and other benefits to foreign personnel access to affordable land, and a relatively simplified investment processes. [[43]](#footnote-43) for instance both Uganda and Kenya offer exemptions from local labor laws.[[44]](#footnote-44) Ethiopia is a particular case in point as shown in Box 2. In South Sudan incentives include the right for investors to trade and profit from any resulting carbon credits from timber on the leased land and the right to sublease any portion or all of the leased land to third parties.[[45]](#footnote-45)

Some studies suggest that investment incentives are significant determinants of international direct investment flows.[[46]](#footnote-46) Other factors which influence investment destinations include the availability of cheap labour, contiguous land and congenial business environment and strategic location. [[47]](#footnote-47)

**Box 2: Overview of Federal Incentives for Investors in Ethiopia**

• 100 percent exemption from payment of all import duties and other taxes levied on all capital goods and spare parts worth up to 15 percent of their values.

• Exemptions from customs duties or other taxes levied on imports are granted for raw materials and packing materials necessary for the production of export goods.

• All goods and services destined for export are exempted from any export and other taxes levied on exports.

• Easy access to credit: if the project is accepted by the Ethiopian Development Bank, if the investor secured (deposit) 30 percent of the investment (in cash) the Bank gives up to 70 percent loan.

• An investor who exports 50 percent of his/her product or supplies 75 percent of his/her product as production input to an exporter is eligible for 2-7 years income tax exemption.

• Income derived from an expansion or upgrading of an existing agricultural enterprise is exempted from income tax for a period of two years, if it exports at least 50 percent of its products and increases, in value, its production by 25 percent.

• Business enterprises that suffer losses during the tax holiday period can carry forward such losses for half of the income tax exemption period, after the expiry of such period.

• Any remittance made by a foreign investor from the proceeds of the sale or transfer of shares of assets upon liquidation or winding up of an enterprise is exempted from the payment of any tax.

*Source: Oakland Institute, 2011(a)*

In Rwanda, a 2005 law relating to investment and export promotion and aims to facilitate procedures for investors and, crucially, provides significant incentives for investors, in terms of a number of tax breaks (notably on VAT and income tax). In addition, the law provides specific guarantees for the protection of foreign investments and stipulates that the only way for the Government to acquire rights over the investment is by following established expropriation procedures.[[48]](#footnote-48)

Government policy to encourage investments in land sometimes result in agricultural ‘growth corridors’ and ‘special economic zones’. These facilitate investments and acquisition of land by large corporations, both foreign and domestic. In the case of Tanzania, the Southern Agricultural Growth Corridor provides an example of such a growth corridor. The corridor covers approximately one-third of mainland Tanzania and its objective is to foster inclusive, commercially successful agribusinesses that will benefit the region’s small-scale farmers.[[49]](#footnote-49) To achieve these objectives, the partners within the initiative, including farmers, agri-business, the Government of Tanzania and companies from across the private sector facilitate LSLBI. Tanzania’s (growth corridor initiative), Uganda’s and the Ethiopian government’s national agriculture-centered development policies are but a few initiatives which East African countries have implemented to promote LSLBI.

**4. IMPACTS OF LSLBI**

**4.1 Gains to date are minimal**

The potential of LSLBI to promote development lies at the base of the willingness of host governments to receive such investments. A review of literature revealed modest references to positive outcomes such as employment generation, increased government revenues and the construction of much needed social and other infrastructure to the benefit of local communities have been recorded as the consequence of some of the projects.[[50]](#footnote-50) In Ethiopia an investment has brought computerized irrigation systems and other agricultural technology In Tanzania evidence of increased small-holder farmer incomes is reported. Asisal processing investment Katani Ltd purchases processed sisal, and provides training and loans to rural micro-enterprises that do the processing. Its investment allows the micro-enterprises to buy processing machines and sisal from local producers. This has had the impact of increasing incomes for 16,500 small-scale producers by 25 per cent.[[51]](#footnote-51) Similarly, in Ethiopia the AfricaJUICE project encompasses an ‘Out grower Incubator Program’ which gives local farmers an opportunity to earn a much higher income by to supply fruit to Africa JUICE for processing. The program’s goal is to develop and support over 1000 hectares of out growers, organized as cooperatives, to supplement the supply of fruit to the processing facility and extend community participation. These local farmers are also able to benefit from the new irrigation system as the growing of passion fruit allows them to practice intercropping with their own produce.

On the other hand, commentators point to the difficulty of assessing the impacts of LSLBI because of the relatively recent nature of investment agreements. More frequently, sources point to the fact that provision of anticipated benefits has fallen far short of expectations. Little evidence that communities living in the areas where investments are taking place have benefited in ways consistent with the stated goal of promoting sustainable development of smallholder farms. Similarly, there is little evidence that broader goals, such as employment and infrastructure creation, technology transfer and enhanced foreign currency earnings, have been realized.[[52]](#footnote-52)

Where jobs are created, workers appear to be paid low wages and working conditions are below acceptable. LSLBI as to other foreign investments, tend to offer basic wage labor employment, mostly low-paying laborer positions, which present a number of disadvantages. First, according to the World Bank, wage labor income by itself amounts to 2 to 10 times less than the income of the average smallholder. Second, most agricultural wage labor positions are seasonal. Thus, the impressive number of positions to be created, such as the 20,000 to 30,000 employees to be hired by Karuturi in Ethiopia are misleading in terms of actual employment creation for local development. In fact, jobs created by Karuturi pay a wage below the World Bank’s poverty limit.[[53]](#footnote-53) The Indian company justifies its low wages by saying that it is merely abiding by Ethiopian minimum wage laws when it pays its employees (at least) 8 Birr. Reports of such suboptimal labour conditions resulting from LSLBI have been suggested by several sources. Among these is the Oakland Institute which has suggested that by granting investors exemptions from local labour laws, countries like Uganda and Kenya, have initiated a ‘race to the bottom’ for desperate workers.[[54]](#footnote-54)

There are some gender considerations. As with other industries, large scale investors in land need to take the necessary measures to ensure the gender equity of labor in order to increase reductions in poverty. These include hiring local women and men to work as wage laborers in fixed-contract positions (rather than only as temporary or casual workers); assigning tasks and awarding promotion opportunities to male and female employees based on appropriate assessment of task requirements, abilities and performance rather than stereotypes about “male” and “female” jobs. In addition, in order to promote equal opportunities for participation in the labour market by male and female employees, investors should provide appropriate provisions to ensure that female workers’ health, childcare and safety needs are met.[[55]](#footnote-55) In order to fully assess the contribution of LSLBI to sustainable development through employment and broad-based wealth creation, these considerations must be established.

**4.2 Challenges outweigh the gains**

*4.2.1 There are significant human rights considerations*

In a report to the United Nations Human Rights Council in September 2009, the Special Rapporteur on the right to food, Olivier De Schutter, highlighted ways in which LSLBI can impact human rights, especially the right to food including. These potential human rights implications of LSLBI are summarized in Box 3 and explored further in other parts of this report.

**Box 3 Potential Human Rights Implications of LSLBI**

* States would be acting in violation of the human right to food if, by leasing or selling land to investors (whether domestic or foreign), they were depriving the local population of access to productive resources indispensable to their livelihoods.
* States would be violating the right to food if they negotiated such agreements without ensuring that this will not result in food insecurity
* the right to development “implies that FDI should contribute to local and national development in in ways that are conducive to social development, protect the environment, and respect the rule of law and fiscal obligations in the host countries.
* The principles underlying the right to development imply that all parties involved, i.e. investors and recipient countries, have responsibilities to ensure that profit considerations do not result in crowding out human rights protection.
* The right to development: transparency and accountability in the use of revenues requires that land leases or purchases are fully transparent, and that the revenues are used for the benefit of the local population.
* The Declaration on the Right to Development requires States to formulate appropriate national developmentpolicies that to assure the constant improvement of the well-being of the entire population and of all individuals
* International Covenant on Civil and Political Rights and the International Covenant on Economic, Social and Cultural Rights the right to self-determination, defined as the right of all peoples to freely dispose of their natural wealth and resources
* The human rights of agricultural workers are very vulnerable to abuse in the context of increased investments in large-scale agricultural projects and should be protected
* In many c ountries in sub-Saharan Africa, the rights of land users are not properly secured. This makes these rights vulnerable in the context of LSLBI.

These potential risks highlight the need to ground agricultural investment within a clear set of foundational principles which guide investments and define accountabilities for parties involved.

4.2.2 Alienation of land and other resources from local communities is highlighted

*Communities are losing their rights in land*

According to the United Nations basic principles and guidelines on development based evictions and displacement,[[56]](#footnote-56) forced evictions do not take place, and that where states fail to prevent such evictions, effective remedies should be provided to those whose human rights have been violated. The underlying principle is that no eviction shall take place unless “(a) authorized by law; (b) carried out in accordance with international human rights law; (c) undertaken solely for the purpose of promoting the general welfare; (d) reasonable and proportional; (e) regulated so as to ensure full and fair compensation and rehabilitation; and (f) carried out in accordance with the guidelines”.[[57]](#footnote-57) The United Nations Declaration on the Rights of Indigenous Peoples also guarantees the right of indigenous people not to be forcibly removed from their lands or territories, and that no relocation shall take place without their free, prior and informed consent and after agreement on just and fair compensation and, where possible, with the option of return. In spite of these provisions in international human rights law, evidence from literature sources reviewed indicates that states are not observing this principle in the implementation of LSLBI. States need to implement strong regulatory frameworks which serves balanced interests in land.

A study by Makochekwana in 2012 investigated the impacts of foreign land deals on local communities in 5 countries including Rwanda, Tanzania and Uganda. The results revealed that most of the land deals in the study had had a negative impact on local communities (See Table 2). The merging picture was that local peasant farmers lost their farming lands to new land deals, other households were forced to relocate, while others still lost their animal grazing areas.

**TABLE 2: SUMMARY OF FOREIGN LAND DEALS IMPACTS ON LOCAL COMMUNITIES**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Kauye Sugar Works -KSW**  **(Rwanda)** | **Kilolo District Project (Tanzania)** | **Neumann Kaffee project (Uganda)** |
|  | **Sugar Processing** | **Timber plantations** | **Coffee Plantations** |
| **Positive Impacts** |  |  |  |
| Employment (job) creation | Yes | Yes | No |
| Increased exports | n/a | n/a | n/a |
| Infrastructure development | n/a | Yes | n/a |
| **Negative Impacts** |  |  |  |
| Displacement of households | Yes |  | n/a |
| Local farmers lost their farmlands | Yes | Yes | Yes |
| Lose of livelihood | Yes | Yes | Yes |
| Increased food insecurity | Yes |  |  |
| Loss of grazing areas |  | Yes | n/a |
| Compensation | No | ? | n/a |
| Increased poverty | Yes | Yes | Yes |
| Destruction of property |  |  | Yes |
| **Overall Conclusion** | Negative | Negative | Negative |

***Source:*** *Makochekwana, 2012*

Key: “n/a- means information not given on this issue

Most countries in the region have land laws to secure rights in land held under customary tenure But perhaps the most extensive protection to rights in customary land rights is offered by the land law in Tanzania which affords the same importance to customary and statutory rights in land. In spite of the protections offered by these laws, The alienation of customary land occupied by locals for LSLBI is widely reported as evidenced by a few examples indicated below. This is the case even in Tanzania where only general land (which excludes village land) can be allocated for large scale commercial investments. However, contradictions in the legislation on the definition of general land mean that village land under the use of communities is sometimes allocated for investments, undermining the rights and interests of communities.[[58]](#footnote-58)

In Ethiopia, close to 100,000 farmers occupy the 100,000 ha earmarked for a sugar development by Al-habasha Sugar Mills Plc and Oromia Regional Government Sugar Development Agency. The Pakistani company began to establish its sugar company in 2008 with 800 million Birr loaned to it by the Commercial Bank of Ethiopia to develop the 70,000 ha leased in Oromia Regional State.[[59]](#footnote-59) Attempts to start the relocation of families occupying the land in question were reportedly met with protests from farmers whose livelihoods would be negatively impacted. As part of these protests, early in 2012, farmers allegedly set the sugar plantation on fire in protest of this resettlement[[60]](#footnote-60).

A Human Rights Watch study reported that 70,000 people in Ethiopia’s western Gambella region were being forcibly moved to less fertile land as part of three-year “villagization” program.[[61]](#footnote-61) The 1.5 million people who the Ethiopian government has said will be resettled by 2013 occupy the exact 3.5 million hectares which has been allocated for leasing to foreign investors for the purpose of large-scale agriculture projects[[62]](#footnote-62). The program is meant to improve the lives of these resettled villages, grant them access to better services, infrastructure and economic conditions but instead, they lost farmland, schools, local health clinics and the little socio-economic facilities to which they had had access before the resettlement. Human Rights Watch reported the intimidation and victimization of community members who did not want to move.[[63]](#footnote-63) Yet another LSLBI, the AgriSol deal in Tanzania involved the removal of 162,000 people who had been farming on the land for several decades.[[64]](#footnote-64)

In West Kenya, Dominion Farms, an American company of has leased 7000 ha of the country’s fertile Yala swamp. Local community members have reportedly indicated that they were not consulted during the negotiation process otherwise they would have been able to point out that the Yala swamp is held in community trust. However, the relevant community County Council(s), which in this case were the Siaya and Bondo Councils, signed off on the contracts that gave Dominion Farms the right to land use[[65]](#footnote-65). When the company took over its land, it constructed a road through the farm which villagers could not use. And even though another going around the farm was constructed, locals were still discontented.

LSLBI involving extractive industries can also result in the dispossession of communities of their holdings in land.New Forests Company, a UK firm leased 20,000 ha in Namwasa and Luwunga forest reserves in Uganda for timber production. A study by Oxfam found that over 20,000 people were forced out of their homes and off their land between 2007 and 2012 to make way for the project[[66]](#footnote-66). The company clashed further with locals when it ordered the clearing of forests and land. The company recently agreed to rehabilitate the squatters whom it had evicted, and as part of its social corporate responsibility agreed to provide social services for those affected.

According to the UN basic principles and guidelines on development based evictions and displacement guidelines, States should take immediate measures aimed at conferring legal security of tenure upon those currently lacking such protection. In spite of these provisions, and in spite of existing legal provisions to strengthen tenure rights, many people continue to hold rights in land which are not secure. In particular, customary claims are rarely afforded the same legal protection as formal property rights and, therefore, remain susceptible to expropriation. And forced eviction.[[67]](#footnote-67)

Tanzania can be considered as good practice with respect to the manner in which LSLBI should be negotiated (Box 4). Tanzania’s land acquisition requirements is distinguished from others by an elaborate system of approvals and consent by actors extending from the village up to the President. This system has been designed to guard against arbitrary appropriation of village land. Secondly a ceiling is placed on the amount of land that can be independently transferred by village-level authorities.

**Box 4: The Process of Negotiating LSLBI In Tanzania**

* In Tanzania all land is vested in the President as trustee. Hence transfers across land categories are subject to the Executive’s approval. Alongside these statutory provisions that confer administrative responsibilities to state actors and village authorities,
* Tanzania’s land laws provide explicit protections for customary rights, which are placed on an equal footing with statutory rights, and which hold sway regardless of whether they are certified. Customary rights of use prevail across the different categories and persist even where land is transferred across categories. As with more formal rights, they can be re-assigned through lease and inheritance but are administered by customary authorities, the Elder’s Councils, whose endorsement is required for allocation and in dispute resolution.
* Now, most land targeted by investors is village land which is regulated under the Village Land Act of 1999. The Act allows Village Councils (with consultation and approval of Village Assemblies) to transfer village land. Such transfers require the approval of village assemblies and cannot exceed 250 ha of land. Transfers involving more than 250 ha (as with most land acquisitions by investors) must be approved by the Minister of Lands.
* To transfer these lands to investors, village land must first be re-categorized to general land, which is then vested in the Tanzania Investment Centre[[68]](#footnote-68) for allocation to investors. The Minister of Lands is required to ensure that the purpose of any proposed transfer of village to general land is explained to the Village Assembly by the Commissioner of Lands or any official s/he assigns. Moreover, the investor is required to address the Village Assembly in order to respond to villagers’ concerns.
* If the Village Assembly approves and recommends the transfer, the Commissioner of Lands forwards the approval to the President, who signs off on the transfer to general land. After the President’s approval, the notice of transfer is gazetted and another 30 days is provided to allow any aggrieved party to lodge complaints prior to the final transfer.
* The land is then vested in the Tanzania Investment Centre, which issues derivative rights of occupancy to foreign-owned investments or a granted right of occupancy to a Tanzanian-owned enterprise. Such leases must not exceed 99 years, and may include periods of 33 and 66 years.
* Leases can be renewed. They can also be revoked subject to the investor’s performance in upholding the terms of the lease.
* Compensation must be paid prior to transfer (Village Land Act, 1999; Land Act, 1999). It can be paid for by the investor if the President so directs (Land Act, 1999).
* As approximately 90% of villages do not have land use plans which document current and projected land use, these must be drawn up prior to transfer. This process is coordinated by district planning agencies, with oversight from the Land Use Planning Commissioner. As with the transfer process, village land use planning requires the input of village residents and other stakeholders into the planning process, including their verification and adjustment of the plan.

Similarly, the 2009 Land Law in South Sudan places the primary responsibility for allocating community land for investment with the traditional authority. This is made only made subject to approval by the state authorities when allocations exceed set limits . According to the Act, root interests in the land remain with the community and upon expiry of the lease the land reverts to the community. The Law also clarifies the process by which traditional authorities may allocate land, requiring community involvement and consensus as well as full consideration of social and environmental impacts of proposed investments.[[69]](#footnote-69)

*Loses extend beyond rights in land*

Another trend that was trend that was observed in the region was that land is usually closed off to the local communities once deals are made between investors and the local authority, or government, even if no cultivation is taking place in proposed development areas. Given that most rural households, particularly the poorest and most vulnerable, depend on communal grazing and forestland for natural resource-based livelihood activities, policy revision is required to counter this socio-economic impact.

LSLBI have implications for other resources other than land. The Indian investor responsible for the Agrisol project faced conflict with the local community when they clashed over water supplies.[[70]](#footnote-70) In case of the Dominion investment in Kenya, disputes over water management and quality are also reported. The concern is that too much water is extracted from the available canals and too little is left for the community to use. In a further twist, an independent survey by the University of Nairobi concluded that the additional irrigation infrastructure developed by Dominion resulted in an improvement in water levels and quality in the lake.[[71]](#footnote-71)

*Prior consent of communities is not sought*

The United Nations Declaration on the Rights of Indigenous Peoples also embodies the principle of free, prior and informed consent which requires States to consult and cooperate in good faith with the indigenous peoples concerned through their own representative institutions in order to obtain their free and informed consent prior to the approval of any project affecting their lands or territories and other resources. The right to self-determination is also recognized by the African Commission on Human and Peoples’ Rights. Clearly then, the obligations of States under international law to protect the rights of local communities when governments enter into negotiations for LSLBI with an outside entity, whether private or government, local or foreign, are well established in international human rights law. However, the bulk of literature sources examined indicate that states are not securing communities’ rights to prior and informed consent, as well as the right to self-determination. Communities are rarely consulted on the terms of LSLBI. Where information is provided to communities, literature sources indicate that this is done after the fact, once LSLBI contract negotiations are already concluded.

*Communities are not compensated meaningfully*

The Makochekwana study mentioned abovestudy concluded that very few affected people were meaningfully compensated.[[72]](#footnote-72) The bulk of literature sources reviewed on this matter endorsed Makochekwana’s findings. Hence, the issue of compensation emerges as a key area of concern. It is evident that land laws do not regulate compensation processes in detail, remaining silent on how and on which base compensation is to be computed. In essence this leaves compensation to be regulated in LSLBI contracts.[[73]](#footnote-73) Accordingly, African national and regional policymakers have highlighted this and other commercial pressures on land, calling for legal frameworks which establishes compensation for affected communities.[[74]](#footnote-74)

There is a gender dimension**.** Land deals have the propensity to exacerbate the existing gender disparities in land access and ownership. In many African countries women have fewer recognized decision making and access rights in land than men, especially for alienation (to sell, bequeath, or rent land). The gender gap becomes even more apparent when documented rights are considered. An study in Uganda found that whereas 69 percent of men and 57 percent of women reported owning land, the proportion of those having any documents showing land rights in their own name fell to 52 percent for men and only 18 percent for women.[[75]](#footnote-75) In contexts where titling is prevalent, women often do not have any say regarding the sale or lease of the land. In the case of land held under customary tenure, evidence suggests that privatization concentrates land in the hands of those who can successfully assert ownership, such as community leaders and male household heads, often to the detriment of poor rural women’s access and use rights. In addition, common use lands upon which women depend for collecting firewood, water, fodder, and medicinal plants often have the most insecure tenure. Governments tend to designate them as ‘unoccupied’ or ‘wastelands’. These lands are therefore most likely to be earmarked for outside investment.[[76]](#footnote-76), [[77]](#footnote-77)

The property rights of pastoral communities are also particularly vulnerable as seen in the eastern region of Ethiopia where livelihoods mainly depend on stock raising. Because of this, eastern Somaliland is one of the regions in Ethiopia that has had the most difficulty accepting government’s agriculture-centered development strategy. Hence, when Israel’s Agropeace started developing 2000 ha in the region for biofuel plants, floriculture and crops, it was quite a challenge for the company to gain the support of local communities.[[78]](#footnote-78)

**4.2.3 Community rights to food are compromised**

The United Nations Special Rapporteur on the Right to Food highlights the need to draw particular attention to the rights of pastoralists. Drylands constitute nearly half of the land area of sub-Saharan Africa. In this context, there is a real risk that land considered services it renders to the local population. This observation is most pertinent in East Africa which is home to the largest pastoral/agro-pastoral populations in the world; 7 million each in Sudan and Somalia, followed by Ethiopia with 4 million.[[79]](#footnote-79)

Indeed, LSLBI frequently involve land in poor regions where food is already lacking.[[80]](#footnote-80) Staple crops such as rice, maize, and milletare usually planted for export to investor countries. In some contexts, all of the crops produced will be exported to the investor’s country, which can be detrimental to local food security, particularly if it diverts local labor from subsistence farming to wage labor. In some instances, a portion of the product may be sold in local markets or given to local laborers. Further revision is required in national policy frameworks to ensure that the rights of the local communities and the poor are protected regardless of the potential for development that large-scale projects hold.

**4.2.4 Revenues losses accompany incentives**

LSLBI appear to be characterized by the awarding of concessions to investors. Some analysts have suggested that by providing fiscal incentives, governments run the risk of losing out on opportunities for direct fiscal support to local taxpayers or for domestically financed investment. Public resources forgone due to investor incentives can severely undermine a country’s tax base.[[81]](#footnote-81) The case of a land deal between the government of Tanzania and the government of Tanzania and American private investor, AgriSol, can be used to make the point.

Box xx Fiscal Incentives and Lost Revenues: The Case of the AgriSol Deal.

Fiscal incentives are being negotiated between the government of Tanzania and AgriSol, for a 325,000 hectare project for corn, soybean, sorghum, and sugarcane cultivation. These incentives may imply substantial unattained revenue for the government, as they include exemption from customs duties on all agricultural inputs, exemption from value-added tax (VAT) on all imported inputs, as well as unprocessed agricultural produce, guaranteed transfer of net profits or dividends of the investment and remittance of net proceeds. AgriSol will generate significant profits through its project. While it intends to invest $100 million over a 10 year period, if corn is cultivated on only 200,000 of these 325,000 hectares, net profits for the company could be $272 million a year, an amount which nearly equals the total budget of Tanzania’s Ministry of Agriculture. The investor is seeking the award of Strategic Investor Status that would include an exemption from the corporate tax, currently 30 percent of this amount.

Source Oakland Institute, 2011 (c)

There are other losses of envisaged benefits from foreign investment. Many African countries allow foreign investors full repatriation of profits. This means these countries forgo this revenue opportunity. For instance, in the case of Tanzania, under the *1997 Investment Act*, foreign investors are guaranteed the transfer of all net profits or dividends of their investment. The fact that there are often few limits on profit repatriation and little restriction placed on the export of produce itself also lead to revenue loses. Consequently, little investment occurs in local processing which would potentially increase employment opportunities. Similarly, South Sudan offered full rights to the Texas-based Nile Trading and Development, Inc. to lease, plant, extract, and export any resources within its 600,000 ha lease area, effectively losing the opportunity to share the economic benefits from its own resource base. [[82]](#footnote-82)

**4.2.5 Smallholder farmers are marginalised**

In spite of the large body of research backs the notion that small farms are more productive, biodiverse, and sustainable than large, industrial-style plantations, agricultural development policy in the region has increasingly oriented towards large-scale commercial ventures, inadvertently undervaluing the potential of family farms and excluding smallholders as partners.[[83]](#footnote-83) In this regard, De Schutter[[84]](#footnote-84) raises a significant question for policymakers. The question raised is whether land transactions which transfer productive potential from nationals to external actors for external interests, directing agriculture towards crops for export and increasing vulnerability to price shocks are acceptable under any circumstance. Fischer *et. al.*[[85]](#footnote-85)observed that the increase in agriculture value added arising from biofuels production was relatively small and that agricultural sectors in developed countries benefit relatively more than developing countries.[[86]](#footnote-86) In addition, the development of a small-scale processing industry to enable local farmers to meet their own fuel needs from their own feedstock has been slow to emerge. The nationalist arguments in favour of harnessing natural resources for energy generation towards meeting national energy demand appear to have given way to the reality of corporate refining for external markets.

Another aspect of this failure to consider smallholder farmers as key actors of agricultural development has been the failure of investments in land to establish linkages with and incorporate smallholder producer into the value chain. This has had the effect of amplifying the implications of resource competition (for land and water) between existing users and incoming investors. Thus, policy provisions are required to prevent the entrenchment of dualism in agriculture in the context of LSLBI.[[87]](#footnote-87)

*LSLBI opportunities carry risks for the environment*

The East Africa region is endowed with rich biological diversity which, if sustainably exploited could put the region on the road to prosperity. These resources are under increasing threat emanating largely from: habitat loss and degradation; alien invasive species; and legal and institutional weaknesses.[[88]](#footnote-88) It is important that LSLBI are examined for the possible impacts on biodiversity. The study observed that this is not always the case and that environmental and biodiversity implication f LSLBI need to be highlighted.

Residents of Ilya, a village a few kilometers away from the 100,000 ha Karuturi farm, experienced the loss of the forests where they collect their firewood and hunt their meat when the Indian investors went on to clear the wooded area. The Gambela region, being the far most fertile and water abundant in Ethiopia, has also experienced environmental degradation as a result of LSLBI. Saudi Star, a company that has leased 10,000 ha in the region to grow rice plans to cut down 100,000 trees. The company has vowed to replant a million as soon as the preliminary phases of the plantation’s development are carried out and underway[[89]](#footnote-89).

The extent to which land is being leased in the Gambella region, seemingly with no thought for the environment, led the Ethiopian President Girmo Wolde-Giorgis and the country’s own environmental regulator to write to the Ministry of Agriculture to express their concern over the lease and sale of forestry land for agriculture purposes. In the past few years Ethiopia has been one of the developing countries that undertook reforestation campaigns to trap carbon dioxide following a pledge of $30 billion by 2012 made by developed countries at the 2009 Copenhagen Climate Summit[[90]](#footnote-90). “Whilst our country is representing Africa in international panels regarding global warming…for no reason should forest land be given out for agricultural purposes” the President wrote.[[91]](#footnote-91)

The emerging evidence indicates that to achieve positive agricultural investment, provisions and incentives to protect the environment and incentives to encourage sustainable agriculture are required. Environmental impact assessments and the regulation of pollution are essential first steps to making market systems environmentally sustainable.[[92]](#footnote-92) For instance, in Kenya a proposal by Italian owned Nuove Iniziative Sri to turn 50,000 ha of land into a jatropha plantation through local subsidiary Kenya Jatropha Energy Ltd was blocked on the basis of social and biodiversity concerns. The land in question, the Dakatcha Woodland area, is home to endangered bird species as well as thousands of people belonging to indigenous tribes who would have had to be evicted.[[93]](#footnote-93)

Unfortunately, while environmental impact assessments may be stated as a required component of the LSLBI project approval process, they are often waived.[[94]](#footnote-94) For instance in South Sudan, the 2009 Land Act. Requires companies to conduct environmental impact studies before the allocation of land is approved. However, in practice, government institutions rarely pressure companies to conduct these studies. The lack of prior impact assessments and mitigation plans increases the likelihood that the project will impact adversely upon host communities.[[95]](#footnote-95)

Risks to the environment emanate from the fact that investment in agriculture promotes large-scale farming, usually intensive, focusing on monoculture/single crop farming and using chemical fertilizers. This agricultural model also tends to use high amounts of fresh water and soil and depends heavily on fossil fuels. There is also pressure on higher-value lands because the investors focus on regions with more fertile soil, land with greater irrigation potential, or places with easier access to markets. At the same time, LSLBI are usually accompanied by high demand for water. Yet, access to land without water is pointless for agricultural investments. In addition, according to agricultural experts many tropical soils are not suitable for intensive modes of agriculture. As a result, LSLBI can result in damage to the environment including soil degradation, deforestation, loss of biodiversity, and depletion of water resources.[[96]](#footnote-96)

The growing flower industry in Kenya and Ethiopia has the potential of lucrative returns. At the same time, the industry depends on fertilizers to increase yields and improve quality as well as pesticides and fungicides to control pests, the industry can have unintended consequences. In the case of workers, the lack of protective clothing may have implications for workers’ health.

In Kenya and Rwanda, threats to biodiversity and the environment also emerge from the provision of marsh or swamp lands for LSLBI. For instance, in Rwanda, the Organic Land Law of 2005 categorizes marshlands under private ownership by the State. In contrast with public state land, such “private state land” can be leased out to third parties. The fragility of ecosystems on these lands requires that these States develop and implement specific legislation for the use and management of marshlands.

On another note, emerging trends indicate that the *jatropha curcas* plant may not be as economically lucrative nor as environmental-friendly as has been popularly depicted. For instance, in a study by the Royal Society for the Protection of Birds, jatropha produces six times the amount of greenhouse gases that fossil fuels do[[97]](#footnote-97). Furthermore, there have been reports of project abandonment based on various factors surrounding the plant’s production. Key among these has been the misconception that because Jatropha does not die when grown on marginal land and dry conditions, this means the plant is productive under adverse conditions. In fact, jatropha has been shown to be the least water-use efficient of 13 bioenergy crops.[[98]](#footnote-98)In Ethiopia, Indian firm Emami Biotech is in the process of abandoning a jatropha project for low yield reasons. The firm returned 75% of the 40,000 ha leased after it attributed the low yield to the land’s “unsuitability for agricultural purposes.”[[99]](#footnote-99) Kenya Bedford Biofuels also, a Canadian company, was last year considering terminating its 60,000 ha jatropha project.[[100]](#footnote-100) Poor economic conditions and four years of failure left the large project almost completely underdeveloped. From these cases it can be drawn that further studies of the plant and its properties need to be carried out in order to securely establish its sustainability.

Whatever the source of the threat to biodiversity and the environment, the resulting environmental impacts must be quantified, and corresponding actions taken to promote encourage sustainable resource use while minimizing and mitigating negative impacts.

**4.3 Responses to emerging challenges**

*4.3.1 AU Declaration on Land, Framework and Guidelines for Land Policy in Africa*

The Framework and Guidelines (F&G) on Land Policy in Africa was developed by the Land Policy Initiative (an initiative of the AU AfDB and UNECA). The F& articulates principles which should inform the development, content and implementation of land policies in African member states. The F&G highlights several priority areas including articulate a policy framework for:

* addressing emerging issues and anticipating future trends relating to land resources,
* providing a basis for more coherent partnership between states, citizens and development partners in land policy formulation and implementation on the continent

The F&G also identifies principles which should govern land policy development and implementation in Africa. These include democratization, transparency, good governance, popular participation, equity, poverty eradication, subsidiarity, gender equity and sustainability among others. By addressing the emerging issues and future trends, the F&G provides States with guidance in the conduct of LSLBI.

The F&G refers specifically to large scale investment in rural land, identifying LSLBI as one of the strategic issues to be addressed by land policy in African states. In this way, the F&G provides Member states with guidance with respect to the principles which should govern the implementation of LSLBI.

4.3.2 The Nairobi Plan of Action

In 2011, under the auspices of the LPI, African governments, parliamentarians, civil society, traditional leaders met to discuss the growing investment opportunities in agriculture as well as the challenges encountered by African states in their efforts to promote land based investments. The meeting culminated in the Nairobi Plan of Action on large scale land based investments. The Plan of Action undertakes to promote assessments of land-based large-scale investments; capacity support to governments, traditional leaders, civil society organizations and communities to facilitate fair and transparent negotiations; establishment of a monitoring and reporting mechanism for tracking large-scale land based investments; development of principles which encourage sound and sustainable investments in land, and guide fiscal policy and the development and implementation of land policies and land use plans that facilitate equitable access and secure land rights for communities - including women and investors, both local and foreign.

*4.3.3 Proposals by the African Development Bank*

On another front, the African Development Bank makes some specific proposals for mitigating risks inherent to LSLBI. The AfDB proposes a set of institutional reforms that foster accountability, proper valuation of land, equitable compensation for the displaced, and guarantees to the social and environmental sustainability of the investments. These reforms reinforce the principles espoused by the LPI F&G They include the following:[[101]](#footnote-101)

* *Tailoring the model of a ‘land board’ to the rural sector* to facilitate investments in land, including investigating formal and informal rights to ‘vacant’ land, and assessing the social and environmental implications of long-term investments.
* *A land auction system:* to help toset reasonable land rental prices and to promotetransparency of the land deals.
* *Effective contract negotiations**and transparency:*to engender respect local land and resource rights,complement food security and not jeopardizeit, and guarantee social and environmentalsustainability.
* *Negotiating food security**agreements:*establishing a pre-agreed proportion of the outputs to be directed to the domestic market to counter the effects of rising food prices.
* *Policy Coordination:* A continental policy coordination facility to ensure that land fees are not set too low and to possibly to establish floor prices for tracts of land of differing quality.

*4.3.4 Civil society and other actors*

Members of the media, academic institutions and civil society organizations have played a key role in highlighting the implications of LSLBI on the rights and livelihoods of affected communities, especially those of women and the poor and in proposing some policy responses. In Uganda, the Uganda Land Alliance has been engaged in educating and raising awareness among communities on their rights in the context of LSLBI. The Kenya Land Alliance has played a similar role in Kenya. Others, such as Oxfam International have undertaken research and produces in depth country case studies in support of their advocacy efforts. In the case of the Oakland Institute, a US based think tank, detailed case studies of LSLBI in Ethiopia, Sudan and Tanzania among others, have been conducted to determine social, economic, and environmental implications of land acquisitions in the developing world. The case studies are based on the thorough examination of the actual agreements, field research, review of literature, interviews with local informants, affected communities, government officials, civil society and investors.

**5. POLICY IMPLICATION AND REQUIRED ACTIONS**

**Based on the scenario observed by this and other studies of the conduct of LSLBI in the region, several priority policy action emerge.**

**5.1 Establish a solid information platform**

Whilst the case has been made for LSLBI to enhance food security, fuel energy security, to contribute to climate change mitigation and to broader agricultural rural development, there is sufficient evidence pointing to serious negative social, political, environmental and economic impacts of LSLBI. A comprehensive, accurate, timely and accessible data platform on proposed and existing LSLBI, is required to provide analysts, policy makers and planners with the information they require in order to avoid and mitigate the impacts of LSLBI. The African Union has both the mandate and the necessary relationships with key policy institutions to commission such a platform. In so doing, the AU can build on existing initiatives which have begun to provide reliable information on the subject.

**5.2 Regulate LSLBI to ensure respect for human and property rights**

**LSLBI have important human rights implications including the right to food, the right to development and the right to self-determination. States must operationalize regulatory frameworks to ensure** LSLBI are implemented in a manner which recognizes and respects these human rights. The AU framework and guidelines espouses a continental land regime which prioritizes security of tenure for all categories of land rights. A priority action for States is to review their land laws and regulations to ensure that all categories of land rights are protected in light of powerful private interests in land held under customary tenure. On their part, Member States should ensure the protection of land rights of communities in the context of investments. Revisions to legislation may be required in order to make mandatory the prior, informed consent of affected communities with respect to LSLBI agreements as well as establishing the basis for their compensation.

The protection of communities cannot be complete in the absence of mechanisms to monitor the performance of LSLBI and their impacts. These systems, together with clear accountabilities in the event of negative impacts should be considered as minimum requirements for the protection of communities. Support is needed to help communities build their capacity in negotiating benefits, compensation and other terms of agreements. In view of the tremendous disparity in the capacities of communities and investors, the playing field should be leveled somewhat through provisions for independent legal counsel for communities.

**5.3 Balance market interests and development priorities**

African states require policy tools to reconcile emerging competing interests in land. Existing policy provisions should be reviewed and where necessary, revised, in order to ensure that social and economic aspects of the impacts of LSLBI are fully considered and mitigated. At the same time, approaches to LSLBI are required which provide a conducive climate for investors without undermining national interests (for interest through under valuing the land) and local livelihoods.

The African Union and its regional economic blocks have an important role in ensuring a coordinated approach to effective governance mechanism by member States in breaking the cycle of under-valued land. Working in collaboration with the AfDB and UNECA and through the LPI, the AU can spearhead a continental policy coordination facility to ensure sustainable regulatory frameworks including establishing reasonable floor prices for lands of differing quality. This also includes guidelines for responsible investment by investors.

Good governance practice necessitates improved consultation and dialogue between investors and communities who are affected by LSLBI. For this to happen, all impediments to the full participation of affected communities should be addressed. This may entail capacity building for communities or providing them with legal support for their meaningful engagement in contract related discussions.

**5.4 Pursue alternative approaches to implementing LSLBI**

The majority of documented LSLBI are implemented as large enterprises based on concessions or leases. The case has been made this form of investment is doing more harm than good.[[102]](#footnote-102) Offering considerable tracts of land on very favourable terms, has had the effect of creating incentive for establishing company-managed plantations rather than promoting more inclusive approaches, especially those which prioritize the interests of smallholder farmers, such as contract farming approaches.

**5.5 Address longer term global governance considerations**

The UN Special Rapporteur on the Right to Food made the observation that the rush towards farmland in developing countries is the result of failures in the past; failure in the past to adequately invest in agriculture and rural development in developing countries, particularly sub-Saharan Africa; failure in the past to promote means of agricultural production which do not deplete the soils and exhaust groundwater reserves and the present day failure today to establish well-functioning and more reliable global markets for agricultural commodities. On this basis, the Special Rapporteur proposed that any efforts to better regulate LSLBI should be accompanied by concerted efforts to address these underlying circumstances which make LSLBI look like a desirable option.[[103]](#footnote-103)

At the same time, African states have, in different platforms, acknowledges the importance of addressing the historic under-investment in agriculture, primary among these is the Maputo pledge. Progress in the fulfillment of this has been slow. Ongoing political will to ensure its fulfillment is required.

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**ANNEX 1. Contribution of Agriculture to East African Economies**

**Burundi**

Burundi’s arable land accounts for 35.57% of the country’s area. The country is currently facing numerous issues concerning land. Among the environmental ones is that of soil erosion. Lands have been over-utilized for grazing and in efforts to expand agriculture. Another is the issue of access to these arable lands. Refuges returning home often find that their lands have been acquired by the state for the exploitation of sugar, palm oil and other lucrative crops. These land disputes have made for an unfavorable atmosphere for investors.

**Comoros**

The 35.87% that is Comoros’ arable land is used for agricultural purposes and some forestry. The inhabitants of the island depend on subsistence agriculture and fishing for their livelihoods. Agriculture, fishing, hunting and forestry contribute to 40% of national GDP and provide 80% of exports. The country’s main staple, rice, is imported as it is not self-sufficient in food production.

***Djibouti***

Djiuti is a small state with a population, which stood at 774, 389 in 2012. It only has 0.04% of arable land and as such has no permanent crops. Scanty rainfall limits crop production to fruits and vegetables, and so most of its food must be imported. Nevertheless, Djibouti occupies a strategic geographic location at the mouth of the Red Sea and serves as an important transshipment location for goods entering the region.

***Ethiopia:***

Ethiopia has East Africa's lowest per capita agricultural incomes, and structural food insecurity plagues some three million people every year. Extreme weather conditions, declining coffee prices, and conflict with Eritrea have contributed to Ethiopia's problems. Although governmental reforms such as market liberalization and tariff reductions have been under way since the 1990s, malnutrition and poverty remain major hurdles, with 44 percent of the population living below the poverty line. Agriculture represents a livelihood for about 85 percent of Ethiopia's population, growth in this sector is crucial for reducing hunger and poverty.

***Kenya***

In Kenya, the value of fruit and vegetable exports has grown by more than US$147 million since gaining independence in 1963 and increased from 3 percent of agricultural exports to 17 percent during the same period. Kenyan smallholders produce about 60 percent of horticultural exports and benefit by about US$46 million from the industry, which increases domestic food security and creates markets for the goods and services of other rural households. Limited government intervention, combined with realistic exchange rates and relative macroeconomic stability, have also attracted private domestic and international investment. An extensive road network in the highland areas allows fast transfer to the airport. Local supermarkets purchase three times the volume of fruits and vegetables that Kenya sells on the international export market.

***Rwanda***

The Government of Rwanda has given high priority to the country’s agricultural sector in its plans for national development. 57% of the country’s arable land is used for cultivation and pasture. With the agriculture sector currently contributing a significant 32.6% towards national GDP, more steps have been taken to increase food production such as the expansion of wheat and maize production.

Somalia

A large portion of Somalia’s population is made up of semi-pastoralists and nomads who largely depend on livestock for their livelihoods. As such, land is mostly used for grazing purposes. In terms of agriculture, this is the most important sector as livestock accounts for almost 40% of the country’s GDP and more that 50% in export earnings.

Somalia’s main exports are livestock, hides, fish, charcoal, scrap metal and bananas produced on the country’s 1.59% of arable land.

***South Sudan***

Rich and diverse landscape includes tropical forests, grassy savannahs, high-altitude plateaus, mountains, floodplains and wetlands. There are vast tracts of arable land found throughout the country, with the most fertile land in the “Green Belt” states of Central Equatoria, Eastern Equatoria, and Western Equatoria. South Sudan’s forests contain a variety of valuable tree species, including mahogany, teak and ebony. They also provide important sources of timber, fuel, food, and medicine for local populations. The Nile, the longest river in the world, cuts across the country, flowing northward to Sudan and Egypt. Its seasonal flooding creates unique ecosystems that sustain a wide range of wildlife species. In terms of non-renewable natural resources, there are large oil deposits scattered across the country. There are also reports of considerable, though as yet unexplored, mineral resources, including copper, gold, tin, and uranium.[[104]](#footnote-104)

***Tanzania***

Tanzania’s arable land was 11.29% as of 2009. Land in Tanzania is used for crop farming, fish farming, livestock keeping and forestry. About 80% of the country’s population, the majority of who are small holder farmers in rural areas, relies on agriculture. Arable land in the country however is unevenly distributed as some regions are scarcely populated while other densely so, forcing people to practice intensive agriculture on small pieces of land.

***Uganda***

Uganda is East Africa's wealthiest country in terms of GDP per capita and per capita agricultural incomes. The Ugandan government has created an environment of investment and growth by maintaining low inflation and export openness, by prudent fiscal management, and by initiating political and administrative reforms. Real GDP grew by 6.3 percent in 2001–2002, and agricultural growth has remained at between 4 and 5 percent since 1999.

*Sources*

*IFPRI, 2004*

**ANNEX 2: DETAILS OF LSLBI REVIEWED IN EAST AFRICA**

**Annex 3: Comparative Land Rentals**

|  |  |
| --- | --- |
| **Value of land (per ha)** | **Countries** |
| less than US$100 | Ethiopia, Nepal, Uganda, Vietnam, Sierra Leone, Niger, Mali, Chad, Sudan, Bhutan, Mauritania, Guyana, Egypt, Tanzania, Mozambique |
| US$101-200 | Burundi, Malawi, Guinea-Bissau, Cambodia, Burkina Faso, Kenya, Nigeria, Madagascar, Somalia, People's Republic of China, Lao PDR, Equatorial Guinea, Yemen, Maldives, Zambia |
| US$201-300 | Rwanda, Bangladesh, Gambia, Haiti, San Tome and Principe, Benin, Pakistan, Ghana, Nicaragua, Liberia, Central African Republic, Jordan |
| US$301-500 | Honduras, Cote d'Ivoire, Armenia, India, Togo, Afghanistan, Tajikistan, Lesotho, Zaire, Zimbabwe, Cape Verde, Algeria, Guinea, Mongolia, Libya |
| US$501-1000 | Morocco, Oman, Angola, Jamaica, Senegal, Guatemala, Congo, Kiribati, Cameroon, Myanmar, Philippines, Uzbekistan, Georgia, Peru, Papua New Guinea, Iraq, Indonesia, Azerbaijan, Kyrgyz Republic, Solomon Islands, Swaziland, Comoros, Djibouti, Sri Lanka, Bolivia |
| US$1,001-2,000 | Democratic Republic of Korea, Cuba, South Africa, Chile, Yugoslavia, Albania, Latvia, Slovak Republic, Micronesia, Marshall Islands, Ukraine, Kazakhstan, Belize, Bulgaria, Colombia, Tunisia, Turkmenistan, Vanuatu, Western Samoa, Romania, El Salvador, Lebanon, Lithuania, Paraguay, Ecuador, Dominican Republic, Syrian Arab Republic, Moldova, Islamic Republic of Iran |
| US$2,001-3,000 | Poland, Estonia, Brazil, Belarus, St Lucia, Dominica, Thailand, Panama, Turkey, Russian Federation, Tonga, Fiji, Granada, Venezuela, Bahrain, Namibia, Botswana, Costa Rica, St. Vincent and the Grenadines |
| US$3,001-5,000 | Guam, Macao, New Caledonia, Martinique, Aruba, Netherlands Antilles, Hungary, Qatar, Seychelles, Kuwait, Mauritius, Antigua and Barbuda, Malaysia, Trinidad and Tobago, Reunion, St Kitts and Nevis, Czech Republic, Mexico, Saudi Arabia, Uruguay |
| US$5,001-10,000 | Barbados, Portugal, Israel, Ireland, New Zealand, Republic of Korea, Greece, French Polynesia, Channel Islands, Virgin Islands (US), Iceland, Argentina, Bahamas, Malta, Suriname, Cyprus, Puerto Rico, Slovenia, Brunei, Gabon, Singapore, Guadeloupe, United Arab Emirates |
| US$10,001-15,000 | Canada, Australia |
| US$15,001-20,000 | Belgium, United Kingdom, Spain, Norway |
| US$20,001-30,000 | Switzerland, Germany, Sweden, France, Italy, Austria, USA, Netherlands Finland |
| Greater than US$30,000 | Denmark, Luxembourg, Japan |

*Source: World Bank (1999).*

1. Prepared by Sue Mbaya, Independent Consultant [↑](#footnote-ref-1)
2. IFPRI 2004 [↑](#footnote-ref-2)
3. EAC, ibid. [↑](#footnote-ref-3)
4. Source: AfDB and ADF, 2011 [↑](#footnote-ref-4)
5. NEPA-OECD, 2011 [↑](#footnote-ref-5)
6. Heady *et. al.,* 2009 [↑](#footnote-ref-6)
7. Bezemer and Heady, 2008 [↑](#footnote-ref-7)
8. Now accepted by the AU as the CAADP as the overarching framework for agricultural development and investment [↑](#footnote-ref-8)
9. See CAADP website: <http://www.nepad-caadp.net/about-caadp.php> [↑](#footnote-ref-9)
10. OECD *et.al.,* 2011 [↑](#footnote-ref-10)
11. Görgenet.al., 2009 [↑](#footnote-ref-11)
12. FAO, “How to Feed the World in 2050”, 2009 [↑](#footnote-ref-12)
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