29 Agricultural growth corridors in sub-Saharan Africa – new hope for agricultural transformation and rural development?

The case of the Southern agricultural growth corridor of Tanzania

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Introduction

The basic idea of Agricultural Growth Corridors (AGCs) is to directly combine the planning and implementation of large transport infrastructure development (basically roads and railways) with sectoral initiatives in agriculture, in order to create territorially defined rural and economic transformation hubs. Usually this also includes both backward industries (services and input supply) and forward industries (processing and packaging, logistics, etc.). This aims to overcome weaknesses of more narrow approaches to rural development in poor countries (Ashley and Maxwell, 2001). Sectoral approaches get easily stuck by not including bottlenecks in transport and marketing, often induced by weak infrastructure, while infrastructure investments in rural areas yield lower returns than in urban areas due low density of beneficiaries and lack of supply response capacity, thereby structurally disadvantaging public (and private) rural investment.

AGCs are a relatively recent approach in sub-Saharan Africa (SSA) but follow on from older approaches of spatial development initiatives (World Bank, 2009). Over the last decade they have gained prominence and international support, including through: the United Nations recognition of Yara, the world's biggest fertilizer company, in the World Business and Development Awards for its corridor concept; the World Economic Forum since 2008; the African Union's New Partnership for Africa's Development (NEPAD); and the G7's New Alliance for Food Security and Nutrition. AGCs now figure prominently in several national development strategies on the continent (Kaarhus, 2011; Gálvez-Nogales, 2014; Reeg, 2017).

In order to fully understand the particularities, strengths and weaknesses of AGCs in SSA, a few additional elements need to be highlighted: many AGCs are planned as add-ons of other types of corridor, often for mineral transport from mine to port (Weng et al., 2013); they are usually planned and managed

as strategic public-private partnerships; and they have large-scale, land-based enterprises in production (plantations) as their backbone. African AGCs often also have regional integration in their target system, in particular between coastal and land-locked countries (Byiers et al., 2014; Gálvez-Nogales, 2014; Reeg, 2017). These particularities are not defining requirements of AGCs but are very important for the priorities of individual initiatives, the way they are executed and their public perception.

While many AGCs are highly ambitious, they are also often strongly contested, in particular due to their linkages to agro-industries and private sector involvement (Paul and Steinbrecher, 2013; Byiers et al., 2014). There is a significant body of literature critiquing large-scale land acquisitions and agro-industry investments in SSA (see Brüntrup et al., 2018). The types of agricultural investments that AGCs in SSA pursue involve a whole range of risks – environmental, social and economic – and in particular they are blamed to exacerbate poverty and food insecurity through land-grabbing and modern farm technology use inappropriate for smallholders.

A stringent evaluation of the impacts of AGCs in SSA is not yet possible, since the approach is young and nowhere yet fully implemented and comprises elements with a very long implementation time. In addition, due to their complexity, a comprehensive evaluation would be extremely difficult even if long-term data was available. Accordingly, this paper cannot provide a rigorous or ex-post impact assessment of any AGCs in SSA, but it can contribute to that debate by providing a mix of evidence and analysis of concepts for one of the oldest AGCs in SSA, the Southern Agricultural Growth Corridor of Tanzania (SAGCOT). The paper brings together four sources of evidence:

- an extensive qualitative study of large agro-investments of the type favoured by SAGCOT and most AGCs – the nucleus – outgrower scheme (NOS) – in three subsectors (sugar, rice and tea), and of the sociopolitical and economic environment, explicitly including the SAGCOT initiative, with more than 280 interviews of a wide array of stakeholders (farmers and farmer groups, farmer and civil society organizations, local and national authorities, investors, researchers, donors) (Brüntrup et al., 2018);
- several short-term site visits and interviews with selected stakeholders, as well as participation in the 2017 SAGCOT field day by the author;
- a systematic analysis of the literature of spatial development initiatives (SDIs) in developing countries regarding the lessons for AGCs by Reeg (2017);
- quantitative impact studies with a large-N sample (>600 farm households) for two older NOSs, in rice and sugar, in the SAGCOT area, often regarded as models (Herrmann, 2017). The available literature on SAGCOT was also reviewed.

The chapter is structured as follows: the first section (*The Southern agricultural growth corridor of Tanzania*) starts with a short overview of SAGCOT and its level of implementation. The section that follows (*Assessing the factors for*

effective implementation of SAGCOT) then reviews how the lessons of successful implementation of SDIs in general are relevant for, taken into account, and (if already visible) implemented in SAGCOT. Next, *Impacts of individual investments* summarizes the impacts of older NOSs on local farmers, workers and rural communities. The final section offers conclusions and recommendations for SAGCOT and more broadly for AGCs in SSA.

The Southern agricultural growth corridor of Tanzania

SAGCOT was one of the first, and may be the most prominent, of the African AGCs. According to a World Bank report (2016, p. 6): “The success of the SAGCOT project will not only help to modernize agriculture in Tanzania but also provide lessons for other countries which have large untapped potential to improve their agricultural productivity and lift large populations from living in poverty”. The SAGCOT initiative was launched during a World Economic Forum (WEF, 2012) meeting in Dar es Salaam in 2010 (WEF, 2016). The corridor stretches from the Tanzanian port, Dar es Salaam, to Malawi and Zambia along already existing road and rail transport infrastructure (Figure 29.1). The initial, and still promoted, blueprint sets the target of US\$2.1 billion of private investment, along with US\$1.3 billion of public sector grants within 20 years, to bring 350,000 hectares under “profitable production”, creating at least 420,000 new employment opportunities and lifting more than two million people out of poverty, while assuring regional food security (SAGCOT, 2011).

The initial plan foresaw six regional clusters with several NOSs, in each of which large-scale, land-based investments (plantations and processing factories: the nuclei) were to be combined with smallholders (the contract farmers or outgrowers; here both terms are used synonymously) who would receive inputs and services from the nuclei and deliver products to them (see Figure 29.1).

The SAGCOT Centre, the main SAGCOT entity, was created in 2011 as a public-private partnership by the Agricultural Council of Tanzania, the Confederation of Tanzania Industries (CTI) and the Rufiji Basin Development Authority (RUBADA), a government authority tasked with water resource management and multisectoral development in the Rufiji basin, which covers part of SAGCOT. The number of private and public sector partners grew from about 20 initially to more than 50 in 2018 (Bergius et al., 2018). The Centre does not conduct implementation of investments itself; its main tasks are promoting shared vision, sharing information and mobilization. The Tanzanian government launched and supported the initiative by designating high level staff, but they did not directly invest much (less than 5% of US\$22 million over five years) (SAGCOT, 2018). Instead, they aimed to support SAGCOT through its regular sector policies, in particular agricultural sector policies and programmes and the presidential initiative “Big Results Now!” of 2013, which aimed, among other things, to fast track 25 NOSs in the SAGCOT region, in the subsectors of sugar, rice and maize (URT, 2015). Several donors supported SAGCOT with smaller amounts and/or specific projects, but it was not until

Figure 29.1 Map of the SAGCOT corridor and schematic organization of clusters 2011

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late 2016 that the major and strongly contested, US\$70 million, World Bank SAGCOT Investment Project was approved to support key SAGCOT entities (the SAGCOT Centre and Tanzania Investment Centre) and provide matching grants for the private sector. The project prematurely closed at the end of January 2019, apparently over disputes with the new government about the use of the matching grants for the private sector vs. local communities and administrations (World Bank, 2019a).

Assessing the factors for effective implementation of SAGCOT

This section assesses the implementation of SAGCOT according to the main clusters of factors identified by Reeg (2017) as key for successful implementation of SDIs in general.

a. Geography and natural resources

The choice of SAGCOT and the clusters is not much disputed. The backbone infrastructure exists and is in acceptable shape. Dar es Salaam is an important market for food and has the most important national port, though its congestion is an issue. The international dimension of SAGCOT is not yet of importance in the planning, though landlocked and densely populated Malawi could become an interesting market in the future, while rural parts of Zambia and Democratic Republic of the Congo may be important production hubs.

As to natural resources, the corridor zone has good production potential, with many areas providing few constraints to agricultural intensification (SNAPP, 2016), including various agro-ecological zones, from tropical to temperate. Options for crops and related value chains are manifold. The choice of SAGCOT priority commodities has changed substantially from the initial blueprint (rice, other grains, livestock/beef, sugar, citrus, banana and other horticultural products) to the first phase of implementation, which concentrated on one cluster (Ihemi) (tomatoes, dairy, soya, tea and potatoes), which shows the many options available.

Land is still available in large quantities. For instance in the Ihemi cluster, more land has gone out of agricultural production than has been newly cultivated in the past 20 years, although more land is projected to be brought into cultivation in the future (SNAPP, 2016). But this does not mean that fallow and other land is unused; it is used for various purposes, including firewood collection and pastoralism – sometimes only in stress years and for regeneration of soil fertility. For the favourite NOS model, large unsegmented portions of land are needed for the nucleus farms. This is the real challenge, although this is not a scarcity but a governance problem (see d. Governance).

An additional issue is water. While water reserves are still sufficient in general, there is strong seasonal variation and some erratic fluctuation over longer periods, with significant droughts and irrigation water scarcity. As a result, there

is competition between water needs for energy and agriculture (SNAPP, 2016). Some private investors opt for the construction of smaller dams that can attenuate seasonal fluctuation; however, for longer drought periods this is not sufficient. With a massive increase in irrigated area, there would be a need for integrated management of the whole basin to carefully provide water withdrawal licenses that not only respect the competition between human users but also leave a minimal base stream flow. Also, some erosion protection and water infiltration improvement measures would have to be designed or coordinated. SAGCOT is well placed to organize such integrated water resource management, with the responsible government body for that task, RUBADA, being one of its founding members, while SAGCOT should be able to bring in higher, member-based acceptance for coordination efforts. However, until now, not much has been done in this regard, since hardly if any early investments did materialize.

b. Hard infrastructure

Infrastructure is a cornerstone of any SDI and should be one for AGCs. The infrastructural backbone of SAGCOT, the main transport axis by road and rail, already exists – in contrast to other corridors and corridor approaches. While this is a great financial, organizational and time benefit for the initiative, it makes the transport and marketing effect of SAGCOT invisible for farmers and locations near to the axis.

However, additional infrastructure is required to transform the existing transport corridor into an AGC, including: feeder roads to open up the lands further away from the main road, irrigation systems (larger and smaller dams and canals), electricity lines and warehouses for storage and cooling, just to name the most important ones (see Figure 29.1). One of the key ideas of the SSA AGC model is that, while the public sector is short of funds, the private sector can provide these for themselves and for the outgrowers and local communities. Partially, such provision of local infrastructure can already be observed in existing NOSs. They are seen as corporate social responsibility projects or as core investments to compensate and remunerate communities. Sometimes there are legal obligations: for example, local road taxes for tea companies. In some cases (electricity, dams, irrigation), regulatory hurdles impede such business models (see d. Governance). In other cases, larger investments (e.g., longer feeder roads, electricity covering several NOSs or whole subregions within the clusters or improvements to the central axis), are too expensive even for the big private agro-industry partners, in contrast to large mining investments which are much larger in investment volume in total and per unit of land area. Also, if they are not linked to a cost-covering supply scheme, individual investors are unlikely to be willing to fund infrastructure that not only benefits their own business but also that of their competitors and others. Since the regional and central governments are unable to fund such infrastructure development, large donors step in. The World Bank's Tanzania country strategy (World Bank, 2018) lists several initiatives that can support SAGCOT infrastructure needs, but they are outside

of the SAGCOT investment project and would need additional negotiations and coordination with other parts of the government, possibly not committed to SAGCOT but with their own priorities.

Social infrastructure investments in SAGCOT are left to negotiations between investors and the local population. Often, investors promise a range of different structures and services and determine that these will be paid for out of profits, not all upfront, making them dependent on the success of the business. This creates high expectations, and since investors do not meet all of them upfront, this often generates mistrust. For the attraction of highly qualified staff, the lack of local quality infrastructure for them and their families is also a problem. Investors in rural areas have to pay high salaries and provide additional benefits for this kind of staff, which is rare in Tanzania. At the level of clusters, possibly common solutions could be found, but no such plans are known.

c. Soft infrastructure

As with hard infrastructure, the provision of soft infrastructure through the government is generally inadequate in Tanzania, as elsewhere in SSA, and one of the key elements of SAGCOT is to have this provided by the private sector. This is particularly true for finance and for the more sophisticated services necessary for the upgraded value chains that are able to serve higher consumer segments and export markets. The tea and sugar subsectors provide evidence that the private sector is willing to provide these specialized services. However, as in the case of hard infrastructure, investors are not ready to fund services that also serve noncontributing, free-riding competitors and may even weaken their own position. Thus, difficult and detailed trade-offs must be negotiated, and what can be provided and funded by whom must be sorted out. Research on the three subsectors of rice, tea and sugar (Brünntrup et al., 2018) shows that complicated arrangements must and can be designed to balance public and private interests, reduce side-selling and free-riding, encourage or oblige enterprises to contribute, support farmers to cooperate, assure quality of services and combine financial and various nonfinancial services. The exact design depends on the particular structure, needs and partners of each subsector; historic path dependency of the site; past experiences; the power of regulation and implementation; the constellation of local and sometimes nonlocal actors; the impact consciousness and vision of the investor; and so on.

This strong specificity of NOS models and the site-specific conditions means that, though SAGCOT can provide a platform for organizing soft infrastructure, specific solutions mostly have to be found in the specific value chains of organizations and often even for individual NOSs. A blueprint is rarely the solution; good practices must be shared and adapted to local conditions.

d. Governance

Binding governance within and outside SAGCOT is almost the same. Only the nonbinding internal rules to which investors subscribe by joining SAGCOT

make (in principle) a difference in governance of the investments and the corridor. This is different from most other SDIs, for which special rules and regulations are put in place and are often very far-going (e.g., on tax and tariffs, labour, land and other resources and services). This is because a space of one third of the national territory is simply too big, and borders of the corridor and of the clusters are too permeable to draw boundaries around and create specific regulations for within the corridor. The key governance issues are:

- Access to large tracts of agricultural land, and often also smaller tracts of construction land is limited, particularly for foreign investors. No single large tract of land, including old government farms, could be cleared for an investor under SAGCOT, and not even under the Big Results Now! initiative. The land ownership and transfer regimes and corresponding legal systems are complicated, opaque, partially contradictory, prone to political interference from all sides and time consuming, and the necessary resources for implementation and monitoring are usually not available.
- The general investment climate for private investments is very weak and has worsened in the last three to four years. In 2019, Tanzania was ranked 144 among 190 economies (World Bank, 2019b).
- Trade policy is unreliable. Although several agricultural sectors, including rice, tea and sugar, are in principle protected under Tanzania's or the East African Community's tax regime, explicitly to encourage investments, smuggling, corruption and influential importers weaken that protection and make investments unprofitable and/or risky. Erratic export bans (district or national) for some crops have a similar effect.
- Specific subsector regulations on products (see trade policy) and services – for instance on quality control, local sale of electricity, financial services and entry of international staff – also add to investor reluctance.

The SAGCOT Centre is aware of these problems. It has established many formats and working groups to collect complaints and discuss them with the administration and policymakers. Some of the formats established include a Land Use Dialogue Forum in partnership with the Sustain-Africa programme, a robust policy network, strategic policy partnerships, focal people, parliamentary excursions, national and regional field days and strategic learning journeys (SAGCOT, 2018). SAGCOT claims to have contributed to some changes in governance related to agribusiness – for instance the abolition of value added tax on feed for livestock to improve the competitiveness of homemade feed against imported.

Thus, SAGCOT can play a role in governance, in particular through networking, mutual learning and managing dialogue and conflict (e.g., over land issues), decentralized services (e.g., extension services), local investments and local export bans. These all have to be managed through communication, building trust, organizing debates and finding or facilitating solutions, and this is one of SAGCOT's most important tasks. Many national regulatory issues are negotiated at sector and subsector level; however, other issues of regulation

implementation, practice and negotiation of informal rules and use of local resources are negotiated at the local level, particularly in Tanzania, which has a relatively high decentralization of government functions, including agricultural extension. The need to be present at the local level has brought SAGCOT quickly to the limits of its capacities. Some years after SAGCOT's launch, only one cluster, Ihemi, had been permanently staffed, and only in 2017 did a second cluster, Mbarali, follow.

What has long been underestimated, is the resistance not only of some interest groups and actors outside the corridor but also of civil society worried about social and environmental harm of an agricultural development model including the private sector, in particular large-scale industries. SAGCOT tried to address the concerns of critics in the blueprint document by labelling its model "green growth" agriculture, by highlighting its principles, by creating an environmental and a social feeder group and by collaborating with scientific bodies. However, some significant resistance has remained. While some common understanding has developed, it is obvious that the visions of different stakeholders are still far apart, particularly with regard to the nuclei, the role of large agro-industries and conventional agriculture (Various CSO, w.d.).

Impacts of individual investments

SAGCOT very much relies on the concept of NOSs. Thus, the impact of SAGCOT can, to a large extent, be assessed by looking at the impacts of its individual NOS investments and the number of such NOSs additionally created through SAGCOT. Other effects at aggregated level, such as the impacts of regulation, side-effects of infrastructure or improved soft infrastructure, will also have to be taken into account but can be expected to be of minor importance since, as argued earlier, SAGCOT is not very active or powerful with regard to these issues.

The evidence is mixed as to the success and local development impacts of NOSs. A distinction should be made between short- and long-term impacts. For the long term, the two formal studies of a rice and a sugar NOS (Herrmann, 2017) show significant and important average positive impacts for people directly involved. Sugarcane outgrowers gained 120–150% higher per capita incomes than the matching control households (depending on the matching method and specification), sugarcane workers 84–99% more and rice workers (there were no rice outgrowers at that time) around 50%. Poverty rates were about 30–40% lower for all groups. The qualitative surveys of Brüntrup et al. (2018) mostly support these positive findings. In particular, people directly affected by tea and sugar NOSs (workers and outgrowers) were found to be better off, as also indicated by long queues to get jobs and in-migration of workers from other places. The indirect effects on the surrounding populations are also quite large, demonstrated by general in-migration to the small urban centres near larger NOSs and their vibrant development. All investors engage in some form of social infrastructure and services, and in more recently established NOSs they are often contractually agreed upon.

However, some smaller groups of people are also affected negatively – for instance, when in isolated markets local food prices increase due to a strong increase in local demand and/or, to a lesser degree, lower local food production. In the short term, land transfers are the main cause of negative effects, as well as distributional conflicts. In the case studies that feature in Brüntrup et al. (2018), there were a few instances where land grabbing was an issue, where displaced people were not well compensated or used their monetary compensations unwisely or where access to some resources and service points was cut off. This was more of a problem in recent investments, although land grabbing has been an issue in the country since colonial times. The literature provides more case studies where land grabbing was a risk in land-based investments, particularly foreign investments (see Brüntrup et al., 2018 for a discussion of these findings). The high number and complexity of impacts in various dimensions; the different, mostly qualitative, methodologies used; the different valuation set-ups and priorities; as well as a highly emotional and sometimes ideological attitude towards industrial and large-scale agriculture may explain these differences of findings of impact. And without any doubt, a wrongly designed or executed large agro-investment can do a lot of harm in a given rural area.

There are many factors explaining and potentially influencing these positive and negative outcomes of individual NOSs, some of them have been mentioned in the previous chapter on governance. Many influences are strongly driven by local forces: the local monopoly situation; the size and duration of the investment; the role of government as shareholder, mitigator and/or arbitrator; irrigation, the type of crop, its market and trade policy; the quality of seeds available; the sophistication of production and integration into farming systems, as well as the type of interplay between investors, administrations and smallholders; and value addition and the package of support services and inputs available. The individual attitude of the investors and the management are also important factors in terms of local impacts. There is strong evidence that the investments that survive in the long run are those which provide important advantages to local communities (Brüntrup et al., 2018). Since SAGCOT has no direct power over these determinants and only has a narrative, its convening power and a voluntary code of conduct to influence them, it seems plausible to reiterate that the impact of SAGCOT will mainly be determined by the sum of the additional investments it is able to lure into the country and much less by the quality of the individual investment impacts.

Conclusions and recommendations

AGCs are a relatively new phenomenon in SSA, though other corridor and SDI approaches have been known in Africa and in other regions for a long time. One striking particularity of African AGCs, at least of the type represented by SAGCOT, is the strong role of the private sector in the design of the corridors and of NOSs.

SAGCOT is one of the earliest and arguably the most prominent AGC in SSA. It is now in the ninth year after its launch. However, the reported results can hardly be described as a success. SAGCOT has certainly achieved a lot in organizing the private sector, orchestrating its interests and voice and shaping the conception of public-private partnerships in Tanzania. However, not a single new NOS, the key element of the approach and blueprint, has been established under the SAGCOT label. SAGCOT claims a number of other investments, jobs and production increases as successes, but these are mostly based on older agro-investments and other projects – as far as available data allows us to judge. The end of the SAGCOT Investment Project represents a serious setback.

Our impact studies, however, show that good, long-term NOSs can yield very important gains for outgrower farmers, workers and communities; while badly designed, unscrupulous investments can do significant harm. Some especially vulnerable groups particularly have to be taken into account, including local migrants, women and pastoralists. However, the biggest challenge for NOSs seems to be bad governance of the economic and institutional environment, which harms investments, investors and local partners alike by hampering successful implementation of the investments and generation of profits.

Despite the obvious weakness of Tanzania and likely of many other SSA countries in creating an enabling environment, the AGC approach with large private sector participation remains appealing since it shows a solution to the various parallel and interdependent weaknesses of agricultural value chain development and rural infrastructure projects by governments and donors in rural areas of poor countries such as Tanzania: lack of funds, technical and economic know-how, long-term orientation and market orientation. What can be learned from SAGCOT for AGC development?

- A high degree of participation and transparency is needed, in particular the involvement of smallholder farmer organizations and local level actors, to provide credibility, to help find the right partners and solutions and also to involve at least some large (including international) civil society organizations, which are so important for building international support. This is more important when large-scale land acquisitions are envisaged.
- An authoritative coordination and implementation is needed. A private or public-private partnership entity such as the SAGCOT Centre may be an indispensable element, but it is not strong enough to quickly trigger important changes. This can only be achieved by a high-level government authority that accepts being guided by the partnership.
- There is a need for catalytic, flexible funding of a sufficient dimension to kick start projects while organizing the longer-term networking, to build capacities of some stakeholders and around some investments, to create early success stories and to keep up and enhance support and credibility.
- More flexibility in the choice of crop and business models should be allowed. Not all value chains should be forced or planned into one predefined

scheme with regard to responsibilities, contractual arrangements, shares, etc. If NOSs and other models requiring large-scale land investments are the key element of an AGC, land issues must be well managed, with more emphasis placed on good governance. If these conditions are not fulfilled, other models of vertical integration of the private sector and smallholder farmers should be preferred, even if this reduces the number of viable options for subsectors and investors.

- Smaller territorial entities (e.g., clusters) are better to start with.
- Long time horizons, particularly in pioneering projects and partnerships, are needed.

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