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The Scaling Down of SAGCOT Public Private Partnerships

From Large-Scale Blueprint Ideals to Small-Scale Pragmatism

Noah M. Pauline | ORCID: 0000-0001-6560-2932

Institute of Resources Assessment (IRA), University of Dar es Salaam,
Dar es Salaam, Tanzania
pauline.noah@udsm.ac.tz

Victor Mbande | ORCID: 0000-0003-3092-344X

Department of Social Studies, Mwalimu Nyerere Memorial Academy,
Dar es Salaam, Tanzania
victor.mbande@mnma.ac.tz

Lowe Börjeson | ORCID: 0000-0002-2445-2699

Department of Human Geography, Stockholm University,
10691 Stockholm, Sweden
lowe.borjeson@humangeo.su.se

Abstract

This study analyses SAGCOT's public-private partnership policy, which anticipated attracting external investors in large-scale nucleus farms to commercialise smallholder farmers. Data were collected from a review of SAGCOT policy documents, a compilation of SAGCOT registered partners and qualitative interview data collected from private companies, government officials, farmers and outgrower associations. The majority of SAGCOT registered commercial partners are small- to medium-scale and most of them were already operating in the area before SAGCOT was established. We conclude that the SAGCOT investment strategy, in practice, has been linked to small- to medium-scale operations and also mainly to already existing enterprises, which stand in contrast to the initially envisioned model of attracting new large-scale farming enterprises to the region. We argue that there is a need for SAGCOT and policy makers to learn from this dissonance between initial policy ambition and actual outcomes of SAGCOT public-private partnerships.

Keywords

Tanzania – SAGCOT – public-private partnership – agriculture – development – policy

1 Introduction

Public-Private-Partnerships (PPP) are often presented as solutions for increasing both the effectiveness (problem-solving capacity) and the legitimacy of sustainable rural development in terms of risk sharing, inclusivity and accountability (Brinkerhoff & Brinkerhoff, 2011; Bjarstig & Sandstrom, 2017). Likewise, other studies (e.g., Bovaird, 2004; Kwak et al., 2009; URT, 2009; Bjarstig & Sandstrom, 2017), state that PPPs are foremost about a division of roles into public goods seeking and profit seeking, and the sharing of risks, whereby, the government/public actors are meant to safeguard the interest of the public (i.e., high quality good/service at a competitive price).

Starting from the 2000s, sub-Saharan Africa experienced a revival of large-scale agricultural investments (LSAIs) in food production through PPP arrangements, as a response to food insecurity (Yaro et al., 2017; Engstrom, 2018). A key premise for adopting the PPP policy for LSAIs was that private sector actors would be effective in driving development by contributing critical knowhow, technology and capital (Hodge & Greve, 2007).

In 2010, Tanzania launched the Southern Agricultural Growth Corridor of Tanzania (SAGCOT) an investor-based agricultural growth strategy and PPP designed to implement the national Kilimo Kwanza (Agriculture First) policy and promote agricultural commercialization (SAGCOT, 2011; Scherr et al., 2013). As a policy for agricultural development and modernization, SAGCOT has largely relied on the promotion of agribusiness investments as a catalysing force, and also attracted international business partners in the sector, such as YARA (Tups & Dannenberg, 2021). Another fundament in SAGCOT policy is the promotion of agricultural commercialisation and growth through building and improving value chains for agricultural produce based on the formation of public private partnerships (PPPs). The SAGCOT initiative received support from the G8, the Tanzanian government and the private sector, among others (SAGCOT, 2011; Bergius et al., 2018; Engstrom, 2018). At the outset, it was anticipated that 350,000 ha of land was to be developed into large-scale irrigation agriculture run by corporate nucleus farms, and an additional 330,000 ha cultivated on contract by smallholder farmers through so called outgrower schemes. Further, this development (if successful) was anticipated to create

420,000 new employment opportunities, commercialise 100,000 smallholder farmers, lift two million people out of poverty, and generate US\$ 1.2 billion in annual farming revenue within the corridor by 2030 (SAGCOT, 2011; Sulle, 2016; West & Haug, 2017).

However, more than halfway to 2030 the dissonance between the early policy vision and reported achievements show how the initial strategy of promoting large corporate nucleus farms has been largely abandoned (Sulle, 2020) for a strategy based on promotion of outgrower schemes and various forms of agribusiness involvement in value chain partnerships. The growing disenchantment with the initial SAGCOT vision for large-scale and rapid agricultural transformation has also affected SAGCOTs coupling with business partners in ways that “jeopardizes these coupling process today” – revealing how narrow imaginaries of agrarian futures easily fail to materialise (Tups & Dannenberg, 2021).

In the SAGCOT follow-up report a total of \$0.5 billion TZS in investments and 96,278 farmers were noted as direct beneficiaries of the value chain investments (SAGCOT, 2018). Later SAGCOT reporting, both from October 2019 and April 2022 (SAGCOT website), lists a partnership portfolio that has grown to 104 registered partners. As we show below, two new medium-scale farming operations (no. 18 and 19 in Table 2), but no new large-scale farms, have been enrolled as SAGCOT partners since the initiation of SAGCOT in 2010. Further, many partnerships are based on an incorporation of locally already active agribusiness operations. Hence, we find that there is a dissonance between the early SAGCOT vision and the practical implementation of SAGCOT policy; manifested by a shift away from an emphasis on establishment of new large-scale nucleus farms to partnerships that largely rely on businesses that were operating in the region already prior to SAGCOT. It is notable that while the large-scale nucleus investor model has not been realised, the central policy and vision of modernization and commercialization through agribusiness investments remains largely intact (SAGCOT, 2018), suggesting that there is scope for learning and critical reflection on how SAGCOT policy goals relate to actual and ongoing transformations in the farming sector.

In this paper we examine the shifts in SAGCOT policy and the reported achievements as the SAGCOT initiative has passed the half-way mark to 2030. We build our assessment on SAGCOT’s own reporting, a compilation of its registered partners and insights from three cases of SAGCOT partnerships drawn from interviews. Before we present our methodology and results, we continue with a section that presents the historical context of large-scale agricultural investments (LSAI) in Tanzania.

2 LSAIs in Tanzania – A Brief Historical Context

The parallel existence of LSAIs and smallholder production is not a new phenomenon in Tanzania. Both the German and British administrations in Tanganyika established plantation agriculture aimed at transforming agricultural production by scale and technology, introducing 'modern and efficient' large-scale production in landscapes dominated by smallholder farming and pastoralism (Coulson, 1977; Hyden, 1980). However, relatively few LSAIs have materialised and performed in accordance with its plans. An often-cited example is the 'Groundnut Scheme' initiated after the Second World War during the British administration to cope with post war demands and drive modernization and commercialization of the agricultural sector (Coulson, 1977). The scheme, proposed by the General Manager of the United Africa Company and aimed at production on government owned land, failed despite the fact that the scheme was carried out by experienced agricultural officers, spending a total of £35 million. Private companies were employed on a contract where land and all the risk associated with the investment were carried by the government (Coulson, 1977). Coulson (1977) associates the inability of the scheme to materialise with the 'blind faith in machinery and large-scale operations' by the government, which implied that elementary agricultural considerations concerning environmental constraints were ignored (*ibid*: 76). The agricultural expertise that led the scheme also viewed the local population as a nuisance and sought to establish the scheme on 'empty land' without questioning why these lands were not favoured by local farmers (Iliffe, 1979).

Following failures of some LSAIs after the Second World War as well as bleak results from numerous attempts to improve smallholder productivity through technical prescriptions offered by government agricultural officers as part of land improvement and soil conservation schemes; agricultural policy shifted towards a focus on so-called 'progressive farmers'. These were farmers that had a previous record of success as commercial farmers and who were therefore seen as a model for increasing levels of production and commercialization in the sector (Coulson, 1977; Hyden, 1980, 2008). The focus on progressive farmers, described as a 'focal point approach', was based on the assumption that resources should be concentrated towards those who could set an example for others to follow (Coulson, 1977). The aim was to increase food production and create employment, following domestic problems related to low productivity and unemployment, which the colonial administration perceived as a threat to political stability (Kalinga, 1993). The policy was applied in almost all British colonies in Eastern and Central Africa during the 1940s and 1950s, as smallholder farmers were largely considered incapable of driving progress (Coulson, 1977;

Kalinga, 1993). Hence, in the progressive farmer policy, pre-existing inequalities among the smallholder farmers were used as a foundational principle.

In the post-colonial era, the state was critical of the progressive farmer model, and favoured the earlier colonial model to focus on LSAIs and smallholder production as parallel strategies (Coulson & Diyamett, 2012). The new socialist government nationalised the LSAIs that had been established and were still in operation since the colonial era (including sisal, coffee, tea, sugar, coconuts and dairy) and transformed these to state farms (Lofchie, 1976; Nyerere, 1969). The more successful establishment of these LSAIs have generally been associated with favourable commodity prices, crops well-adapted to dry conditions (e.g., Sisal), and continued government support (Shivji, 1986; Hartemink & Wienk, 1995). While a few LSAIs (including sugar, tea, coffee and haricot beans) continued in production as state farms, others, such as the Basotu wheat scheme and most sisal plantations failed (Kimaro et al., 1994; Coulson & Diyamett, 2012; Homqvist, 2015). Amongst those that were able to continue production, most were not profitable and many were privatised in late 1980s and 1990s. Reasons associated with these failures vary from case to case, where studies point at the management problems associated with nationalisation into state farms, volatile commodity prices, mechanisation problems, shortage of labour, problems with skills transfer, poor infrastructure, soil fertility decline and declining demands on the world market (Baffes, 2005; Hartemink & Wienk, 1995; Martiniello, 2016). To sum up, even if failure has not always been the outcome of LSAIs in Tanganyika/Tanzania, history shows that risks are certain and that expected outcomes of LSAIs have in many cases not been realised.

3 Methods

This study combines a review of SAGCOT policy documents, a compilation of SAGCOT registered partnerships and qualitative interview data collected from private companies, government officials, farmers and outgrower associations, individual farmers and the SAGCOT Centre Ltd (SCL). Secondary data were collected from openly available SAGCOT web resources and reporting. Interviews were conducted in August 2017, October 2019, March and October 2020, with key actors in the following SAGCOT partnerships (including outgrower farmers): the Kilombero Sugar Company Limited (KSCL) in the SAGCOT Kilombero Cluster, GBRI business solution (fruits and vegetables farming) and Lusitu Agribusiness Group (potato farming) in the SAGCOT Ihemi Cluster. The KSCL case represents a large-scale nucleus-outgrower scheme that is often

mentioned as a successful agricultural PPP investment in Tanzania. As the KSCL combines estate (nucleus farm) with small-scale outgrowers' production, it also represents the central model for large-scale agricultural investments as envisioned in SAGCOT's initial policy (SAGCOT, 2011). Secondly, the two other partnerships we studied represent more recent SAGCOT investments and were studied as examples of the more recent policy focus on value-chain development. The two central policy documents produced by SAGCOT that we have analysed are the SAGCOT *Investment Blueprint* (2011) and *The Journey of the SAGCOT Initiative 2013–2018* (2018). Also, *The Inclusive Green Growth* (IGG) guiding tools (SAGCOT, 2019a, b, c, d) were reviewed.

We conducted an interview with one key informant in GBRI business solution and Lusitu Agribusiness Group, respectively. Three interviews with the same key informant were conducted at SAGCOT Center Limited at different periods between 2017, 2019 and 2020. We did one group interview with four staff members in the department of Outgrowers at KSCL and a key informant interview with a staff member of the Sugar Board of Tanzania. Group interviews were also conducted with six randomly selected outgrowers' associations (from a total of 17 associations of the KSCL-Outgrower model), where three associations were selected from Kilombero and Kilosa districts, respectively. We first held one group interview with leaders of each association about the history and organisational structure of the associations and later conducted a focus group discussion with a group of 6 to 12 farmers (outgrowers) at each association.

A checklist of questions was prepared and used to guide interviews. Questions addressed the objective of the specific SAGCOT partnership, the role of each actor and organisation in the partnerships, risks and benefits sharing, and the history, development and challenges of partnerships, organisations and individual actors.

4 Results

4.1 *The Initial SAGCOT PPP Policy*

The SAGCOT initiative is operationalized by two sister organisations, including the SAGCOT Centre Ltd (SCL) and the SAGCOT Catalytic Trust Fund (SCTF). The SCL is mandated with the role of coordinating partners in the PPP and facilitating partners to unlock the investment potentials of the country. It acts as an intermediary between private and public actors, which is done through convening partners, creating networking forums and aligning resources to priority areas. The SCTF is mandated with sourcing finances in order to

catalyse investments in agriculture (SAGCOT, 2011). The SCTF sources funds from civil society organisations (CSOs), donor agencies and the government of Tanzania. Similar mandates of the SCL and SCTF continue in the later modified SAGCOT policy (SAGCOT, 2018). Since its inception, all partners operating under the SAGCOT initiative are guided by three overarching principles, which are food security and nutrition, inclusivity and environmental management (SAGCOT, 2011).

Apart from private companies, the SCL and SCTF, other central actors in SAGCOT PPPs are government authorities (at national and local levels), non-state actors (i.e., CSOs), farmers associations, and development partners. According to the initial SAGCOT policy the main role of government actors was to create an enabling business environment and provide policy guidance to facilitate investment. The role of CSOs was to support the SAGCOT agenda through advocacy on various issues (i.e., mainstreaming social, economic and environmental issues in project implementation), while the main role of development partners was to offer financial support for research and capacity development (SAGCOT, 2011). Farmers associations organise smallholder farmers who produce on contract as outgrowers and according to the early SAGCOT model outgrower farmers were anticipated to receive technical and advisory support from nucleus farms established by private partners.

4.2 *The Shift in SAGCOT PPP Policy*

In SAGCOT's follow-up reporting and updated policy document from 2018, the number of successful partners that have been established with private companies during SAGCOT's early phase are highlighted (SAGCOT, 2018). Most of the listed private actors (Table 1) are, however, not the outcome of new private investments in the region, but reflect partnerships with agricultural enterprises that were already established prior to the launch of SAGCOT. In line with this, the follow-up report focuses on the development of value-chains as a vehicle to link smallholder producers with agribusiness, i.e., through SAGCOT partnerships, while the role of investments in new large-scale farming operations is de-centred as a key strategy. Hence, contrary to its initial focus on attracting new large-scale investors, SAGCOT policy has shifted to a strategy for improving and developing both existing and new agricultural value chains that source produce from small- to medium-sized producers (SAGCOT, 2018). Further, the follow-up report note that such value chains are associated with specific SAGCOT agri-business Clusters, namely, Ithemi (Iringa and Njombe regions), Mbarali (Mbeya region) and Kilombero (Morogoro region) (SAGCOT, 2018). These areas have all had established agribusinesses in place prior to SAGCOT, which has formed a ground for SAGCOT partnerships. Other less developed

SAGCOT Clusters include Rufiji, Ludewa and Sumbawanga. The SAGCOT Ihemi Cluster was the first to be established, comprising Iringa and Njombe regions. The Ihemi Cluster focuses on the development of five priority value chains, namely, Tea, Potato, Tomato, Soya and Dairy. The Kilombero Cluster followed in 2017, where the focus is on sugarcane and rice value chains. In the Mbarali Cluster, the focus is on developing value chains in rice production (SAGCOT, 2018).

4.3 *SAGCOT Achievements in Relation to the Initial Blueprint Plan*

While the potential for a continued successful development of SAGCOT outcomes in terms of agricultural and rural development is clearly communicated in the SAGCOT follow-up report, it is also evident that the quantitative goal of putting 350,000 ha of land in large-scale profitable production (as envisioned in SAGCOT, 2011), serving regional and international markets by 2030, is not likely to be realised (SAGCOT, 2018). In fact, as shown in Table 1, there is no reporting of new large-scale nucleus farms in the SAGCOT corridor as envisioned by the early SAGCOT policy. Reported achievements indicate that investing in small- to medium-scale producers may be a viable path, and this is also the path that the SCL will continue to promote (SAGCOT, 2018). However, if the targets of creating 420,000 new jobs and raising the value of farming revenues to US\$ 24 billion before 2030 (SAGCOT, 2018), at least if measured on the basis of the performance of SAGCOT partnerships only, will be met remains to be seen.

The initial SAGCOT vision was to attract US\$ 3.5 billion from agricultural partnerships by 2030; US\$ 2.1 billion from private sector investments and US\$ 1.4 billion from the government and development partners (which were to be used for infrastructure development, such as roads). By 2019 (nearly halfway), SAGCOT reported that US\$ 0.9 billion has been attracted from private sector investments registered by SAGCOT. The private registered partners, according to SCL documentation, were the same 52 companies in both October 2019 and April 2022 (Table 2).

Table 1 presents the SAGCOT categorisation criteria of levels of investments (i.e., large, medium and small), as stated in The Inclusive Green Growth (IGG) guiding tools (SAGCOT, 2019a, b, c, d). The IGG guiding tools are used by SCL to categorise registered partners as *producers* or *processors* as well as into categories of size: small, medium and large-scale operations.

Table 2 shows all private partners registered by the SCL in October 2019 and April 2022. All companies which were operating in the region before the initiation of SAGCOT and the registration as partners by the SCL have, in dialogue with SAGCOT officials, been labelled as “Before”, whilst those which were

TABLE 1 Categories of registered partner

Size and type	Characteristics
Small-scale producers	Farm size up to 10 ha, predominant family labour, predominantly low use of technology and investments capital is up to TZS 50 million
Medium-scale producers	Use of hired labour, capital investments from TZS 50 million to TZS 1 billion, moderately mechanised technology, moderate production capacity and farm size from 10 to 100 hectares
Large-scale producers	Highly mechanised farm operations; farm size of more than 100 hectares, high dependence on hired labour and capital investment more than TZS 1 billion
Small-scale processors	Include use of hired and family labour, relatively low capital investment, low technology and relatively low processing capacity
Medium-scale processors	Fifty (50) to ninety-nine (99) employees, capital investments from TZS 200 million to TZS 800 million and moderately mechanised technology (SAGCOT, 2019d)
Large-scale processors	More than one hundred (100) employees, capital investments more than TZS 800 million and highly mechanised technology (SAGCOT, 2019d).

SOURCE: SAGCOT, 2019A, B, C, D

established after the initiation of SAGCOT and registered by SCL were labelled as “After”. The latter categorization was regardless of whether the investor was attracted by the SCL or not.

Results show that the majority of private partners were small-scale (43.1%), followed by large-scale (37.3%) and medium-scale (19.6%). Only a few (10.5%) of the large-scale companies were directly linked to actual farming activities, such as Darsh Industries Ltd and Kilombero Sugar Company Ltd, but none of these were established after SAGCOT. Instead, a majority (89.5%) of the large-scale partners are engaged in input business, financial or credit services, value addition/agro-processing and markets of agro-products from smallholder farmers (outgrowers). Likewise, medium-scale investments were engaged in supporting smallholder farmers to access markets, inputs and credit facilities. For the small-scale partners, however, a majority (68.2%) were engaged in farming and agricultural inputs services, including horticultural crops and dairy farming (Table 2).

Out of the 52 listed private partners, only 14 (27.5%) were new investments established after the SAGCOT policy. Among them, nine (9) are small-scale, followed by four (4) which are medium-scale, and only one (1) is a large-scale investment (i.e., AKM Glitters Company Ltd, engaged in Poultry business). This corroborates well with responses we received in interviews, where it was mentioned that the majority of the new investors are small- to medium-scale, while only a few (less than 1% of all private SAGCOT partners) are large-scale companies (Table 2).

According to SAGCOT representatives, SCL has been supporting small- to medium-scale farmers to improve productivity and commercialise. The support is in the form of provision of inputs, implements, awareness/knowhow, technology, and market access. It was further reported that one of the reasons why SAGCOT has been focusing on small- to medium-scale farmers is that they contribute much more to the country's GDP than large-scale farms.

TABLE 2 Registered private partners by SAGCOT Centre Limited

Partners	Scale	Operations	Timing
1. Agriculture and Climate Risk Enterprise	M	Insurance services	Before
2. Africa Fertilizer and Agribusiness Partnership	L	Agricultural business services	Before
3. African Grant Advisors	M	Financial services	Before
4. AKM Glitters Company Ltd	L	Chicken value chains services	After
5. African Potato Initiative	M	Potato value chains services	Before
6. ASAS Dairies Ltd	L	Dairy value chains services	Before
7. Bagamoyo Fruits Company Ltd	S	Organic farming of fruits and vegetables	Before
8. Bayer Life Science Tanzania Ltd	L	Agricultural services	Before
9. Beula Seed Company Ltd	S	Farm inputs (seeds)	Before
10. Clinton Development Initiative	S	Training and agricultural inputs services	Before
11. CRDB Bank Plc	L	Financial services	Before
12. Darsh Industries Ltd	L	Tomato processing services	Before
13. Deka Foods	M	Market guarantee services	After
14. Diageo	L	Production of beverages and market services	Before

TABLE 2 Registered private partners by SAGCOT Centre Limited (*cont.*)

Partners	Scale	Operations	Timing
15. DOB Equity	L	Dairy processing and financial services	Before
16. EA Fruits Farm and Company	S	Business services	Before
17. Empien Farms Ltd	S	Irrigation infrastructure services	Before
18. Farm for the Future (T) Ltd	M	Commercial maize farming	After
19. GBRI Business Solution Co. Ltd	M	Farming, business and financial services	After
20. Green Valley Agro Ltd	S	Greenhouse farming and processing of vegetables	After
21. Guavay Company Ltd	S	Agricultural fertiliser services	After
22. Homeveg Tanzania Ltd	S	Business services	Before
23. JNSA Vision Plus Limited	No inf	No information	No info
24. Kilombero Sugar Company Ltd	L	Planting, processing and market services	Before
25. Live Support Systems (T) Ltd	S	Oxygen and nitrogen gas production and farm inputs services	After
26. Minjingu Mines and Fertilizer Ltd	L	Production and export of fertiliser	Before
27. MORAGG Company Ltd	M	Animal feed	Before
28. Mtenda Kyela Rice Supply Co. Ltd	S	Business services	Before
29. National Microfinance Bank Plc	L	Financial services	Before
30. Njombe Milk Factory Company Ltd	S	Milk processing factory	Before
31. Olivado Tanzania Ltd	S	Production and export of fruits	After
32. Opportunity International	M	Financial services	Before
33. Pannar Seed (T) Ltd	L	Farm inputs (seeds)	Before
34. Pyrethrum Company of Tanzania Ltd	L	Planting, processing and marketing	Before
35. Pee Pee Tanzania Ltd	S	Production of grain storage bags	Before
36. Profate Investments Ltd	S	Farmer field school for diary	Before

TABLE 2 Registered private partners by SAGCOT Centre Limited (*cont.*)

Partners	Scale	Operations	Timing
37. Raphael Group Ltd	M	Rice processing, packing and marketing	Before
38. Righa's Safina Aqua Farming Co. Ltd	S	Model Fish Farm	After
39. SABMiller/Tanzania Breweries Ltd	L	Producing beverages and market services	Before
40. SeedCo Tanzania Ltd	L	Farm inputs (seeds)	Before
41. Shambani Graduates Enterprises Ltd	S	Valorization (dairy value chain)	After
42. Shambadunia Ltd	S	Business services	After
43. Southern Highlands Agricultural Development Company Ltd	S	Sunflower seeds processing plant	Before
44. Silverstreet Capital LLP	L	Poultry business and out-grower scheme	Before
45. Sunflower Dev. Company Ltd	S	Farm inputs (hybrid seeds)	Before
46. Syngenta International AG	L	Farm inputs (hybrid seeds)	Before
47. TamuTamu Tanzania Ltd	S	Farming and business services (apples)	After
48. TANSEED International Ltd	S	Farm inputs (seeds production)	Before
49. Tanzanice Agrofoods Ltd	S	Farm inputs (seeds production)	After
50. Tomoni Farms Ltd	M	Agricultural and animal husbandry services	After
51. Unilever Plc	L	Business services	Before
52. Yara International ASA	L	Farm inputs (fertiliser)	Before

(*L = Large; M = Medium; S = Small): Data on timing, partners and operations is based on the SAGCOT website in October 2019 and April 2022, and from interviews with SAGCOT officials.

4.4 *Review of Three Different Partnership Models for Crop Production*

After profiling and analysing the categories of registered private partners by SCL in the previous section, we now shift focus to a review of three specific partnerships, each representing a different type of PPP-model aimed at stimulating commercial crop production through the inclusion of small- and medium-size producers. These partnerships include one large-scale

nucleus-outgrower operation representing the favoured model in the early SAGCOT policy vision (Model 1), and two value chain models representing the current and down-scaled focus of the SAGCOT policy (Model 2a and 2b). The cases illustrate the shift in SAGCOT policy by detailing the different partners and their role in each PPP model.

4.4.1 Model 1: The SAGCOT Blueprint Large-Scale Nucleus-Outgrower Model

The Kilombero Sugar Company Limited-Outgrowers scheme (KSCL-OG) has been in operation since 1998 and has effectively acted as a blueprint for the initial SAGCOT policy vision for driving change through large-scale agricultural operations based on the nucleus farm and outgrower model. In the KSCL-OG production model outgrowers should meet KSCL sugarcane requirements by providing high quality cane through a stable, independent and sustainable supply chain, and thus providing economic stability for the company, while at the same time providing the community with economic, social and environmental benefits. Since the start, outgrowers have not had individual contracts with the KSCL, as they must join a cane growers' association and register with the Sugar Board of Tanzania. A contract called the Cane Supply Agreement is signed between the company and the farmers' associations (Smalley et al., 2014).

In 2018 there were 17 sugarcane growers' associations located in two districts, where processing plants are also located. Eight Associations are located in Kilombero district (where the K1 processing plant is located), whilst the remaining nine Associations are located in Kilosa district (where the K2 plant is located). Under each association, there are various growers' groups, which comprise individual growers. The crucial role played by outgrowers in the KSCL-OG scheme was emphasised by KSCL representatives:

Outgrowers are important business partners for KSCL, producing not less than 40 percent of all cane processed by our two mills. Outgrowers are the only potential opportunity for KSCL business growth vision, holding 81% of the total growth in cane volume.

Group interview with KSCL representatives

The KSCL was registered by SAGCOT in 2017. At the time of registration, 60% of the raw materials came from KSCL and 40% from outgrowers. The KSCL has been ordered by the government (which is also a shareholder) to double the production of sugar and will have to rely largely on outgrowers for further expansion as the opportunities for expanding the nucleus farm is more limited. The KSCL expansion strategy also includes the construction of more factories.

The KSCL is both a planter and miller of sugarcane. It manages its own farms and owns two sugarcane processing plants (K1 and K2). A central role of KSCL in the KSCL-OG PPP is to buy sugarcane from outgrowers, but KSCL also ensures that farmers receive inputs and loans from Agents and banks respectively, where KSCL deducts the amount from their sales. Additionally, KSCL retains 10% of farmers' sales, and pays outgrowers for their produce at the end of the sales season. Outgrower farmers may receive more or less depending on the market dynamics and thus share market risks. There is an Outgrowers department at the KSCL, which administers the links between Outgrower Associations and the KSCL. Through this department, Associations meet with the KSCL to negotiate price per ton of sugarcane, division of proceeds and resolve conflicts. The KSCL does not provide any services or goods to associations, such as provisioning of farm implements and inputs, or in other ways share production risks with outgrowers.

As a private actor in the partnership the KSCL, in accordance with the PPP model, is to bring value addition in the partnership, through market access, dissemination of technology and research (SAGCOT, 2011). After registering as a SAGCOT partner, the company's role shifted from a focus on the company's own production for the market, and the quality of its produce, to the whole sugarcane value chain, including its role in expanding outgrower production (Interview with SCL in 2019).

Other main actors in the KSCL SAGCOT partnership are banks, CSOs, donors, Government Ministries, the Sugar Board of Tanzania, Local Government Authorities and the Sugar Research Institute. The SCL itself acts as a broker, ensuring that the agreement between actors is respected. CSOs support the partnership in various ways, such as monitoring and advocating for environmental sustainability (i.e., WWF) and inclusivity (i.e., Care International).

The main role of Outgrower Associations is to link individual cane growers with the market through KSCL by coordinating the Cane Supply Agreement, which is signed between the company and the farmers' Associations every three years. Through the Outgrowers Department at KSCL, Associations represent cane growers in negotiations with the company about new contracts and the price of sugarcane for the forthcoming season. Associations also assist with evaluation and future projections of expected production and supervise contractors to make sure that sugarcane from individual growers' farms are cut, loaded and transported to the plant in time. Moreover, associations make sure that farmers are supplied with implements and inputs by local suppliers. Associations, thus form a link between outgrowers and other actors, including the Government, CSOs and donors.

Outgrowers reported that they bear all risks associated with cane growing, and that risk sharing with KSCL was not realised through the SAGCOT

partnership. For instance, farm implements and inputs were supplied by local vendors to outgrowers through loans arranged by the outgrowers associations (interviews with outgrowers in 2017). Most outgrowers do not have access to irrigation infrastructure and rely on rain-fed agriculture, putting them at risk of low cane production during drought years. Likewise, their farms are often not connected with reliable roads, making it difficult to transport farm inputs and products, especially during the rainy season. Only a handful of outgrowers, whose plots are neighbouring KSCL plots, are connected with all-weather roads. Outgrowers cultivate, cut, load and transport the produce and also carry these costs. In their view, outgrower farmers bear the risks of growing sugarcane by performing all tasks related to growing, cutting and transporting sugarcane, and also share market risks with KSCL. Overall, however, the individual outgrowers primarily regarded KSCL as a market for their produce, and did not speak about their role as growers as part of a SAGCOT PPP.

Leaders of the outgrowers associations perceived the SAGCOT partnership as skewed towards a dominance by the private sector actor (i.e., KSCL). For example, there was a reported lack of transparency during weighting of sugarcane and laboratory testing of sucrose levels, which were key determinants of the selling price. The local government authority provides extension services to sugarcane growers, and during our fieldwork there was an extension officer stationed at the KSCL by the Sugar Board of Tanzania (which has the mandate to ensure good cane husbandry). Another government actor, the Sugar Research Institute in Kibaha, conducts research on sugarcane and demonstrates new technologies to planters through local field farms to ensure easy uptake. However, in contrast to the KSCL, the public sector actors were reported, by outgrowers, to be passive and in many cases did not provide the anticipated services and support to outgrowers associations. Outgrower associations would, for example, have liked the local government to be more active in addressing issues of transparency in weighting and laboratory tests of sucrose levels. It was reported by KSCL that associations are allowed to send representatives to the plant to witness the weighting and laboratory tests, but this still requires knowledge about the process and was not seen as making much difference to outgrower farmers as a way to remedy the lack of transparency.

4.4.2 The SAGCOT Shift from Large-Scale Investors to a 'Potential Partner and 'Emergent' Farmer Model

Small- to medium-scale companies account for 90% of SAGCOT private partners (Table 2), indicating that since the inception of SAGCOT, other PPP models than the one represented by the KSCL described above, have emerged as leading visions for how SAGCOT should drive agricultural and rural development. Instead of being hinged on attracting new large-scale private investments in

agricultural production, a key type of actor in these alternative models, as pronounced by farmers during interviews and in SAGCOT communication are 'potential' or 'emergent' farmers as partners in PPPs. According to SCL documentation (SAGCOT, 2018), such potential partners include small- and medium-scale farmers, often educated elites, with capital to invest in infrastructures for commercial farming, including green houses and irrigation. They may own 10 to about 200 acres, and are usually involved in both farming and trading. The potential farmer PPP model, as we label it here, is based on the capacity of emergent farmers to link other smallholder producers to markets and ensure that they meet the quality of produce that is required by markets. A potential farmer may, for example, link other farmers, e.g., as out-growers, to markets by branding, packaging and selling produce through their companies. Hence, a potential farmer PPP can be organised in the same way as a nucleus-outgrower PPP described above. While the potential farmer PPP models represent a shift away from a focus on large-scale nucleus farms, the model also represent normalisation in SAGCOT policy to incorporate existing agribusiness and commercial producers in partnerships, which we interpret as a shift away from the early vision of SAGCOT as an attractor of new investors. Further, if placed in a historical perspective, this shift towards a model based on emergent farmers as PPP partners, following bleak outcomes in attracting investments in large-scale nucleus farm operations, parallels the shift to the progressive farmer policy during the late British colonial period.

During interviews, participants mentioned that most potential farming businesses are currently in the Ihemi cluster. This is due to the fact that the area has received relatively extensive investments in infrastructure, including railways and roads, even before the initiation of SAGCOT, which have been funded by both the government and international development partners (SAGCOT, 2018). The Ihemi cluster currently produces about 65% of food consumed in the country (SAGCOT, 2018). According to the SCL key informant, this area has vast potential due to both its climatic condition, availability of resources, but also due to the existing potentiality among the farmers and agribusiness companies that are already operating in the area. Potential farmers are linked by the SCL to a larger network of agribusiness companies. They were also given training, organised and funded by the SCL, both within and outside the country, to learn new farming practices. Some of the companies that they were linked to include seed companies, fertiliser companies and others that serve as markets for the produce. These companies are registered by the SCL to support potential farmers in agribusiness, but not necessarily engaged in farming themselves.

We have chosen to focus on two types of potential farmer PPP. First, a nucleus-outgrower model cultivating fruits and horticultural products such

as tomatoes, cucumbers, French beans, snow peas, sugar snaps, pepper, baby corns, and avocados and, second, an association of farmers that cultivate potatoes (i.e., not a hierarchical nucleus-outgrower model). These two cases capture the two main types of crop production partnerships that are registered within SAGCOT as well as some of the dynamics related to the production of different types of crops.

4.4.2.1 *Model 2a: Medium-Scale Nucleus Farm with Individual Outgrower Contracts*

This model is based on producers who have adopted the outgrower model and engage in cultivating different crops ranging from horticultural, fruits and cereals. As an example, we present the GBRI business solution, which is an agricultural company registered and supported by SCL to produce quality fruits and horticultural products for national and international external markets (Interview data from GBRI key informant). GBRI started its agriculture investment in 2016 with 8 acres and by 2019 had grown to about 50 acres with 40 acres in Kiwele and Mufindi and 10 acres in Kilolo, both in the Ihemi Cluster in the Iringa region. Apart from producing on its own land, the company also sources produce from outgrowers who are located across different altitudes within the cluster. The demand for fruits and vegetables is higher than the supply from the company's own production, and it was reported that while the ability of the company to supply was about 6 metric tons per week in 2018, the overall demand was about 26 metric tons per week. However, with the added supply of produce from outgrowers much of this gap could be filled. Furthermore, the diverse locations of outgrowers in different altitudes also ensured a more steady supply of produce throughout the year. In 2018, the company had more than 32 smallholder outgrowers, and was aiming to recruit more to meet both interests from smallholders and market demands.

Within this model, outgrowers are directly linked to the commercial grower (e.g., GBRI Company). There are no associations that directly mediate the interests among the smallholders. Farmers are given training on cultivating high value vegetables and fruits, credits for buying high quality first generation seeds, and support through a technical team that provides extension services during the whole process of cultivation from planting to harvesting and post harvesting. Training and seed credits are organised and financially supported by GBRI in collaboration with the SCL and other donors linked to SCL. The company has its own pack house in Iringa that packs and brands the products prior to distribution to markets in Dar es Salaam and abroad. Our informants were of the view that this model provided a possibility for scaling-up both the nucleus farm and outgrowers (interview data from GBRI and SCL key informants).

4.4.2.2 *Model 2b: Association of Small- and Medium-Scale Farmers without Outgrowers*

In this partnership, farmers, commercial farmer associations, private companies, research institutes and non-governmental organisations are the key actors. This model does not build on linking smallholders to markets through outgrower contracts. Instead, it is the commercial farmer association that in this case supplies high quality seeds and provides relevant knowledge, e.g., on land preparation and other technical services, to smallholders. It was reported that some of the smallholder farmers had been able to increase production from 1 or 2 tons per acre to 8 tons per acre as a result of applying high quality seeds. High quality seeds are provided by agribusiness companies, e.g., Mtanga foods Ltd., as well as the research institute TARI-Uyole, but farmers also use the opportunity to multiply such seeds and sell them to other smallholders due to their high demand.

Lusitu Agribusiness Group (LAG) which is an association of smallholders in Lusitu village, Njombe district, is one of the associations that organises commercial small- to medium producers. The producers (farmers) who are members of the organisation act as trainers and role models to train and support other smallholder farmers with the aim of increasing productivity in potato farming. The LAG not only supplies quality seeds, but has also created an association called Lusitu Potato Marketing (LuPoMa) – a potato value chain that helps farmers to clean, grade, weigh and package their produce for sale. With support from another SCL member, Kilimo Trust, through its ‘Calories and Household Incomes from Potato Subsector’ (CHIPS) project, the LAG/LuPoMa association, has also been able to build a packing house. In this partnership, each partner (LAG and Kilimo Trust) had a fifty percent stake in building the packing house. Most of the packed potatoes are sold to urban centres, mainly in Dar es Salaam. Kilimo Trust, through the CHIPS project, also links LuPoMa with food factories, which produce potato chips and other purchasers in urban areas.

5 Concluding Discussion

SAGCOT describes its private-public partnerships as ‘business unusual’, where private companies are seen as a vehicle for speeding up the utilisation of improved seeds, petrochemical inputs, and machinery (SAGCOT, 2011). However, in a historical context SAGCOT’s focus on a top-down introduction, first envisioned through new investments in large-scale production and later through the ‘potential farmer’ model, of new technologies, mechanisation,

supply chains and scaling up of production is more typical than unusual in a Tanzanian context. As the performance of the large-scale nucleus-outgrower model has failed as a model for investments in new large-scale nucleus farms, those that are in existence have also been subject to critique regarding their potential as drivers of agricultural development, more broadly, through outgrower schemes. Low salaries, social differentiation in favour of the local elites, limited full time employment opportunities and debts among contracted smallholders are some of the problems that have been highlighted (Oakland Institute, 2015; Sulle, 2016; Wilson, 2016; Bergius et al., 2018; Oakland Institute, 2019). A key challenge for the implementation of large-scale farm operations has been the challenges associated with acquiring large pieces of land that can be leased to investors on a long-term basis, as suitable areas, as a rule, are already farmed by smallholders who may be difficult to evict even on land that formally has been targeted for LSAIs (Blache, 2018; Sulle, 2020). In the case of the KSCL-OG partnership, outgrowers are crucial for reaching the company's production goals, but as our findings show KSCL mainly acted as a market for outgrowers, leaving out other important aspects for improving farm productivity. These may include provision of irrigation infrastructure, roads, farm inputs and implements. This is contrary to a conventional PPP model, which emphasises the role of value addition, technology and expertise sharing in a partnership (Bovaird, 2004; Brinkerhoff & Brinkerhoff, 2011; Bjarstig & Sandstrom, 2017). From the outgrowers' perspective, there was no real partnership, except for the market contract between KSCL. What the perceptions of outgrowers and their associations suggest, we argue, is that this specific PPP vision disintegrates as you move down closer to smallholder producers in the value-chain. Further, outgrowers associations were reported to be acting semi-autonomously with little control or support from local government authorities, except for linking government employed extension workers with individual cane growers. The associations were regarded as the entry point or gateway for any actor who wanted to work with or give support to individual cane growers.

In the initial SAGCOT PPP policy it was envisioned that new external capital and technology provided by large-scale nucleus farms should drive a commercialization and modernization of smallholder outgrowers in the region (SAGCOT, 2011; Sulle, 2016). But, as we have shown, this policy has been modified to better match the landscape of already existing agricultural investments in the SAGCOT region. The failure of the initial PPP model should not be interpreted as specifically related to the SAGCOT initiative as research on LSAI and land-grabbing in Tanzania and beyond have detailed several challenges and problems with this model (e.g., Hyden, 1980; World Bank, 2008;

Coulson, 2015; in Sulle, 2016; Teklemariam et al., 2017 in Engstrom, 2018; Sulle, 2020). According to West and Haug (2017), agricultural investments are rarely as glamorous or as depressing in reality as the polarised narratives surrounding SAGCOT suggest, which also finds support in our results. Our study on how the SAGCOT initiative has developed since its initiation more than a decade ago, further highlights the importance of looking beyond the polarised debate of SAGCOT policy, to trace in what ways SAGCOT, as a PPP policy, has actually shaped (or not) farming and business practices in the region. Our results indicate that SAGCOT support has been involved in the small- and medium-scale PPPs we have studied, but our data does not reveal to what extent SAGCOT support has actually made a substantial difference or not. Looking ahead towards 2030, we clearly see the need for further studies on how SAGCOT develops, both how its policy vision is reshaped (or not) and what influence it has on effectively shaping farming and agribusiness in the region.

Disregarding the initial SAGCOT PPP policy vision for attracting large-scale producers, SAGCOT policy for commercialising smallholders has in principle remained the same, as reported in the initial blueprint report in 2011 and the follow up report in 2018 (SAGCOT, 2011, 2018). The list of partners also shows that in practice SAGCOT's support of crop production and processing has had a focus on improving value chains, e.g., through partnerships with small- and medium-scale commercial producers. The focus on emergent farmers as potential partners in SAGCOT PPPs follows the same basic logic as manifested in both earlier and current policies based on 'progressive farmers' as agents of development (Coulson, 1977; URT, 2010). This development could be associated with what Cotula et al. (2009) view as a shift in the distribution of risks and returns within the agricultural value chains, by shifting risks downwards to the processors and distributors. By doing this, agriculture becomes a more attractive investment option as it aims to maximise returns from production (Cotula et al., 2009).

Another clear tendency is that of the listed SAGCOT partners, it was predominantly the small-scale partners that were engaged in crop or horticultural production, while medium- and large-scale business partners were mostly delivering services that support farmers to access markets, inputs and financial solutions. Hence, as a policy for agricultural development, commercialisation and improved food security, it is noticeable how the SAGCOT partnerships that directly involve farming and primary food production in practice heavily relies on small-scale agricultural producers, including horticultural crops and dairy farming. An important question to explore further with respect to this is whether the three overarching SAGCOT principles of delivering improved food security and nutrition, inclusivity and environmental management are

in fact more realistic with the down-scaled pragmatism that we have documented, as compared to the initial, high risk and failed vision of large-scale investments. Even if our study points to this, more research is needed on how small-scale producers are benefiting from increased opportunities and burdened by heavier risk taking in PPPs.

To conclude, while the early SAGCOT PPP policy has not worked as a strategy to attract new investors and establish new large-scale nucleus farm operations, it is clear that the emphasis on attracting new investments in large-scale agriculture production is present also in the SAGCOT follow-up report in 2018, even if an increased attention is also placed on PPPs for the purpose of developing agriculture value-chains more broadly. We find that even if there is no substantial reorientation in SAGCOT policy, it can be argued that the registered SAGCOT partnerships reflect a development that has adapted to an existing local entrepreneurial context and farmer-led development processes (Woodhouse et al., 2017; Chome et al., 2020; Mbande, Börjeson & Liwenga, in revision) rather than being the result of a successful implementation of a “business unusual” policy. The lack of success in attracting new large and medium-scale investors, not least in crop production, is in SAGCOT reporting compensated by highlighting already established operations as SAGCOT successes. Hence, the SCL has been reporting a good deal of successes that is difficult to disentangle from development that would have taken place even without SAGCOT-led partnerships. As already noted above, there is a need for more research to further explore and explain the impacts of SAGCOT policy on agricultural production and related business in the region.

In line with previous research, we propose that less effort should be put into perfecting grand agricultural investment models. More effort should instead be directed to analyse the political economy of how grand policy visions “hit the ground” (Chome et al., 2020), and how development policies can learn from, and more effectively support, the variety of agricultural investments that grow from local initiatives taken by small- and medium-scale actors – by recognising the priorities, needs and challenges of diverse private and public actors (West & Haug, 2017; Woodhouse et al., 2017). A recent study, for example, shows how farmers use of agroecological practices within the SAGCOT region can contribute positively to food security and human well-being of small-holder farmers, while also emphasising the importance of effective extension services, technical training and capacity building to scale-up the implementation of sustainable farming practices (Milheiras et al., 2022). What our study highlights is thus the importance to recognise, learn from, and align national agricultural development policy to, how the SAGCOT partnering process has in practice scaled down, from the initial blue-print intention to attract new

large-scale investors to a partnership portfolio consisting mainly of small- and medium-scale businesses that have a longer history in the region than the rolling out of SAGCOT policy.

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