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briefing paper

Peace, Bread and Land

Agricultural Investments in Ethiopia and the Sudans

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Summary points

- Investment in land is not conflict-neutral, and given the history of violent conflict and mutual destabilization in the Horn of Africa there is potential for localized political grievances to turn into wider regional conflict.
- There is significant foreign investment in land in Ethiopia by parties from Africa and further afield. This is primarily geared towards producing for the export market, and is often concentrated in regions with limited political influence.
- In South Sudan, much investment activity appears to be speculative, while Sudan has a long history of large-scale agricultural investment.
- The Ethiopian government appears to be using private capital (most noticeably foreign investment) as a means of generating revenue for the state from peripheral areas. Large-scale land investment should be seen as an extension of the historical processes of state formation.
- Access to accurate information about the extent and nature of large-scale foreign investment in Ethiopian, Sudanese and South Sudanese land is extremely limited. So broader narratives of 'land-grabbing' – seeing governments as unwitting victims or as predatory regimes – are a potentially misleading oversimplification in the Horn of Africa, where local populations do not lack agency in this process.

Introduction

The issue of foreign investment in land in the developing world is an emotive topic, both internationally and locally. In the context of rising commodity prices globally,[1] the phenomenon of land investment has gained new levels of international attention in the past three to five years.[2] In the Horn of Africa, which has seen some high-profile investments, scrutiny will only increase following the declaration of famine in Somalia during July 2011, and the (belated) international focus on continued food insecurity in parts of Ethiopia and elsewhere in the region, including in Sudan and South Sudan. Food security is a perennial issue in the Horn; the Famine Early Warning Systems Network (FEWSNET) reports about 12 million people in urgent need of assistance across the region, including 4.6 million in Ethiopia.

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In that context, foreign investment in land for agriculture in the Horn has drawn critical attention. In general, the most attention-grabbing investments tend to come from relatively wealthy food-importing nations, particularly when these deals involve sovereign investment vehicles – although in the Horn of Africa examples of sovereign investment are relatively scarce. In Ethiopia and Sudan, as well as other parts of Africa, land deals tend to be characterized in the media as displacing the burden of food insecurity from wealthy (or wealthier) states onto already distressed populations in land-rich but relatively poorer countries.

Ethiopia forms the core of the Horn of Africa geographically, by population and in terms of its regional profile. It shares a border with all the other states in the region. The current government in Addis Ababa has directly intervened in civil wars in Somalia and Sudan, and fought a war with Eritrea. Ethiopia has a population of nearly 83 million people, constituting about 56% of the region's population (including both Sudans). Agriculture is central to its history, and the question of land – nationalized in 1974 – has been at the centre of much political and social debate in the country for decades. Ethiopia has also seen some of the most high-profile foreign land deals in the past five years – some of vast proportions. The government in Addis Ababa is actively courting investment in large-scale agribusiness projects.

There have also been reports of large foreign land deals in Sudan, and particularly South Sudan. Sudan's significance for the security of the Horn is difficult to understate; most countries in the region have stakes in the political process unfolding there, as South Sudan seeks to establish itself as an independent state and – perhaps more significantly – a functioning economy. Agriculture is central to the history of the riverine areas at the heart of the modern Sudanese state, where the Blue and White Niles converge, and there is a long history of foreign and private-sector participation in the sector. In South Sudan, the scale of some of the massive land deals reported presents a mismatch with the nascent condition of the economy.

Many foreign investment deals, particularly in land, raise questions about the levelness of the playing field

1 Although commodity prices retreated after reaching record highs in mid-2008, many food commodity prices rose sharply again during 2011. The FAO Food Price Index surpassed its 2008 peak in December 2010, and reached a new peak in February 2011. See http://www.fao.org/worldfoodsituation/wfs-home/foodpricesindex/en/.

2 See GRAIN's archive of media reports on land deals at http://www.farmlandgrab.org/.

between host-country governments and investors, and about whether governments are serving the interests of the population (at national and local level) or those of the ruling elite. In countries whose governments suffer from a perceived lack of democratic legitimacy, including those in the Horn, these concerns can become more acute.

The attendant debate tends to be conducted in the international arena, especially in the Western media. Foreign investment in land is often characterized as 'land-grabbing'. The motivations of both investor and host-country government are scrutinized, often superficially, and local users of the land in question are usually cast as victims, potential or actual, with little agency of their own.

Much policy-orientated research has focused on a variety of legal and economic issues, with the aim of determining the conditions under which foreign investment in commercial agriculture can yield benefits for host countries and local communities. Although questions of sustainability and equity are considered, the aim of most research has been to draw out cross-country policy lessons, rather than examine country-specific dynamics.

Aims and scope of the paper

This paper focuses on the local context of the Horn of Africa, and seeks to situate what has been observed about investment in land within the region's historical context. The paper relies mainly on existing secondary literature on the subject of foreign investment in land in general and in Ethiopia and Sudan specifically, complemented by some media reports and the perspectives of some of the author's contacts. No primary research was carried out, and no interviews were conducted with government officials or with investors. The paper aims to contextualize the current debate in the academic literature on the subjects of politics and violence in the region. More importantly, it aims to start a conversation by helping to determine which questions are useful, and where to start looking for the answers.

In the past few years, a number of studies – including by the International Institute for Environment and Development (IIED), World Bank, Future Agricultures Consortium and Oakland Institute[3] – have been carried out to put some figures on land acquisitions in developing countries, and contextualize the processes under which these deals are taking place. The phenomenon is not limited to the Horn of Africa, or to Africa – although the continent is regularly characterized, particularly in the media, as having the lion's share of the world's available[4] arable land not currently under cultivation.[5] Both the IIED and World Bank studies represent early efforts, drawing on a small but growing body of academic and policy literature, to complement and move beyond the picture painted in media reports. Both studies were grounded in an attempt to assess the developmental benefit or otherwise from foreign investment in land, and contain significant details about activity in Ethiopia and Sudan.

However, investment in land is more than a developmental question. The Horn of Africa is prone to violent conflict, to a greater degree than any other region in Africa.[6] This means that what is often a contentious subject in many parts of the world – investment in and control of land – becomes even more heavily charged and has direct implications for political stability in the region. This paper's main focus on Ethiopia with additional consideration of Sudan and South Sudan reflects the paucity of useful data on other countries in the region, and the extent to which it is Ethiopia's border areas that warrant particular attention – in the context of the process of state-building and consolidation that has been ongoing there for more than a century.

3 See, respectively, Cotula et al. (2009); World Bank (2011); http://www.future-agricultures.org/; and http://media.oaklandinstitute.org/land-deals-africa.

4 Cotula et al. (2009) note the importance of distinguishing between land not under cultivation and land 'availability'. Much land not being cultivated at any one time is still subject to claims for usage, for example by pastoralists or practitioners of shifting agriculture.

5 See World Bank (2009).

6 See Healy (2008).

Map 1: Sudan and South Sudan

Sources: UN Department of Field Support, Cartographic Section, Sudan Map No. 4458, October 2011 and South Sudan Map No. 4450 Rev. 1, October 2011; Douglas Johnson, *When Boundaries Become Borders*, Rift Valley Institute, 2010, www.riftvalley.net/publications, Map 1: Sudan 2010: Administrative boundaries, contested areas, railways, main towns and rivers. The boundaries and names shown and designations used on this map do not imply endorsement or acceptance by the author or Chatham House.

Current trends

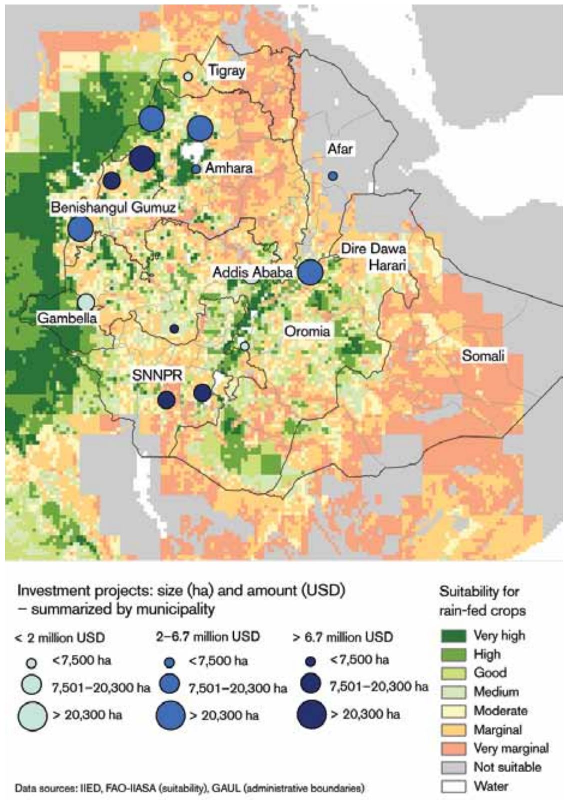
Level of activity

Ethiopia

The World Bank's 2011 report indicates that, of 406 large-scale (500 ha or more) land projects agreed during the five years prior to December 2009, 23 involved foreign investors.[7] Of nearly 1.2 million ha involved, 607,000 were allocated to foreign investors. These projects were inventoried in only five of Ethiopia's nine administrative regions: Amhara; Benishangul Gumuz; Gambella; Oromia; and Southern Nations, Nationalities and Peoples Region (SNNPR). The distribution of projects described in the 2009 IIED report shows a similar pattern, and a map from that report provides an indication of the location of existing deals – which appear to be concentrated in 'peripheral' areas of the country (see Map 2). This is a significant feature, if it proves an accurate description, since these areas are relatively late additions to the historical Ethiopian polity – the modern borders of which were only established a little over 100 years ago. The process of the economic and political assimilation of these regions, and their populations, is still ongoing in Ethiopia.[8]

The World Bank's figures indicate another potentially significant trend, which is that domestically sourced projects vastly outnumber foreign ones.[9] However, foreign projects account for more than half of the land reported allocated, and had a much larger median land allocation of 4,000 ha (compared with 700 ha for domestic projects). It is important to note that these figures do not constitute a full and developed picture of sectoral activity, although they do represent one of the most comprehensive attempts yet undertaken to capture the trends.

Map 2: Documented land acquisitions in Ethiopia, 2004–09



Source: FAO (2011). *The State of the World's Land and Water Resources for Food and Agriculture (SOLAW) – Managing Systems at Risk* (Food and Agriculture Organization of the United Nations, Rome and Earthscan, London). See Cotula et al. (2009), p. 44. The boundaries and names shown and designations used on this map do not imply endorsement or acceptance by the author or Chatham House.

Sudan

For Sudan, a less developed picture emerges. The World Bank reports that 132 projects were agreed between 2003 and 2008 in the nine states covered by the study (Blue Nile, River Nile, North Kordofan, Northern, Gedarif, Gazira, Khartoum, Kasala and White Nile).[10] Of these, 42 were attributed to foreign investors, with a median allocation of 8,400 ha – compared with 6,930 ha for domestic investors. Domestic (i.e. Sudanese) investors, however, accounted for nearly 3.1 million ha of the almost 4 million ha included in the inventory.

South Sudan

Significantly, none of the states covered in the World Bank's study are located in South Sudan, which became independent in July 2011. However, a report published

7 See World Bank (2011), p. 156.
8 See Markakis (2011).
9 'Domestic' is defined as 'African' in the Ethiopian data used by the bank, apparently following the classification used by the relevant Ethiopian government agencies.
10 See World Bank (2011).

by Norwegian People's Aid (NPA)[11] described 28 large-scale investments in South Sudan in agriculture, biofuel or forestry covering 2.64 million ha, signed between 2007 and 2010 by both domestic and foreign investors.[12] Including large-scale land projects (500 ha or above) from other sectors raised the figure to 5.74 million ha.

The study notes that, with respect to South Sudan, the size of the deals reflects an investor appetite that is remarkable, given the relative insecurity of the area. A similar observation could be made about apparent investor interest in parts of Ethiopia, and to some extent Sudan (outside South Sudan) – although for the latter, there is a decades-old pattern of commercial farming in the Gazira-White Nile-Sennar region, mainly run by domestic businesses, with some involvement of foreign investment.

Crops and markets

Investment into commercial agriculture is targeting a wide range of crops, with both domestic and export markets in mind. Planned and actual investments include cereals, sugar, potatoes, feedstock for biofuels (including oil palm), oilseed and horticulture (cut flowers for export). For example, Saudi Star – part of Mohammed Al-Amoudi's business empire (see Box 1) – is growing rice for export on a 10,000 ha plantation in Ethiopia's Gambella region; grain not of export quality will be sold

Box 1: Saudi Star

Saudi Star is part of the MIDROC Group of companies, which are owned by Saudi-Ethiopian businessman and investor Mohammed Hussein Al-Amoudi. His other business interests in Ethiopia are extensive, and range across many sectors of the economy, including mining, import-export, manufacturing and hospitality. Saudi Star's operations are focused on agriculture, and rice production in particular – with an export market in mind.

Location: The initial project aims to grow rice on a plantation in Gambella, although Saudi Star has reported[a] that it intends to acquire up to 500,000 ha in various locations for cultivation of rice and other crops. The company has established a polishing centre in Debre Zeit (Adama), for preparation of the rice for export.

Terms: The deal – posted to the Ethiopian Agricultural Portal website – was signed on 25 October 2010 and gives Saudi Star a 50-year lease on 10,000 ha of land. The cost per ha is specified at 30 birr, for a total annual rent of 300,000 birr (about $17,600). The lease is potentially renewable, and contains a performance-linked option for further land grants of unspecified size. At least 25% of the land must be developed within the first year. Contradictory media reports exist, giving a longer lease term and varying fees per ha. The company is already growing rice on the concession, according to the Oakland Institute.[b]

Impact: Saudi Star's is not the only project in Gambella, nor the largest. Nevertheless, concerns have arisen over the fate of those displaced to make way for the plantation. The plantation creates some employment, and unconfirmed reports cited by the Oakland Institute suggest that wages for seasonal workers are significantly higher than average. However, water usage is also a key question, with the Alwero river potentially facing strain to meet local needs and irrigate the plantation.

a See Midroc website: http://www.midroc-ethiopia.com.et/md06_nwa_saudistar_riceplant_agreement102.html; accessed 17 December, 2011.
b Oakland Institute (2011), p. 25.

11 See Deng (2011).
12 Ibid.

on the domestic market. (This is consistent with the practice for coffee exports enforced by the Ethiopian Commodities Exchange.)

What is cultivated on large-scale farms is a key question, as some crops will have more potential to be sold on local or regional markets than others. Cut flowers for export, for example, can be expected to attract little demand in the region. However, crops such as sugar – for example, that grown by Tendaho Sugar Factory, a state-backed enterprise (see Box 2), on a 54,000 ha plantation in the Awash valley in the Afar region of Ethiopia[13] – could be marketed throughout the region. The same holds to some extent for wheat, maize and rice.

Somalia, Somaliland, Djibouti and both Sudans – particularly newly independent South Sudan – could thus provide key markets for crops grown in Ethiopia, raising the possibility of economic cooperation across borders. Ethiopia, a country with a perennial food deficit, could in principle benefit from food exports should farms in South Sudan become productive. Given that some agricultural investments in Sudan are long-standing, they may already have reached a natural equilibrium in terms of exports within the region. Moreover, given existing transportation and other economic linkages with South Sudan – and that country's vast dependence on food imports – Sudanese exports may more naturally be drawn south than to the east into Ethiopia.

Box 2: Tendaho Sugar Factory

The Tendaho Sugar Factory was created by the Ethiopian government in late 2006, when it merged the operations of the Tendaho Agricultural Development project – which had been focused on cotton production – into a new project. Local Afar elites had been key stakeholders in the cotton plantation, many of whom were marginalized under the transformation.

Location: The Sugar Factory and plantations will cover 54,000 ha of land in the Afar region, along the Awash River valley.

Terms: As it is a government project, the terms under which the development is taking place have not been disclosed. The state is the ultimate owner of land, and so it is unlikely that rent is being paid to the regional administration. Moreover, as there had been an existing plantation project, the question of compensating affected populations was probably side-stepped. A feasibility study recommended allotting 1,800 ha for 'pastoralist development'. Conversion of the Tendaho plantation to sugar cultivation fits into a wider Ethiopian strategy of boosting sugar production. Sugar is a key potential export earner, the main destination market being the EU. Government targets for the plantation include 600,000 tonnes of sugar, and 61,000 cubic metres of ethanol.

Impact: Sugar is a product that could find an export market in the region, fostering economic linkages between countries in the Horn of Africa, and it is also consumed in the Ethiopian market itself. Nevertheless, the main concerns around the Tendaho Sugar Factory centre on the relationship of the project to the local population. Beyond the interests of local elites, and more significantly in terms of livelihoods, the plantation involves construction of a new dam on the Awash River, which will dramatically affect downstream water levels, and could see the lakes of the inland Awash River delta dry out. More immediately, the irrigated plantation areas are not accessible to Afar pastoralists. Markakis suggests the project effectively ends the Afar economy and way of life.[a]

a Markakis (2011), pp. 297–300.

13 See Dereje Feyissa (2011), p. 15.

Sources of investment

Although foreign investors have attracted the most attention, domestic players are equally, if not more, significant in terms of the land actually under cultivation – as indicated by the partial picture shown in the data above. Particularly in South Sudan, many foreign investments appear to be speculative, or at the very least they are some distance from implementation. Speculative investment is also a concern in Ethiopia, although the lack of a private market for land (which remains state-owned) constrains this dynamic. That said, there is very little reliable information available to establish whether large projects are being implemented. Media reports abound, but tend to confuse land allocation and actual development.

Foreign investment also comes from a variety of geographical sources, although the available evidence is not comprehensive. Noted in the inventories carried out by NPA, the IIED and the World Bank are private-sector, parastatal and state-backed enterprises from South and East Asia, Europe, North America and elsewhere in Africa. The picture that emerges from the inventory exercises suggests that media reports would appear to be over-emphasizing investment from the Gulf states and from China – especially for Ethiopia, where South Asian firms appear to be the most active.

Nevertheless, investors from the Gulf and the wider Middle East are potentially very significant players in the Sudanese context. It is important to bear in mind that Sudan has historically been closely linked – politically and culturally – to the Middle East, including Egypt and the Gulf States.[14] For Ethiopia, the experience of foreign investment in agriculture and other sectors, albeit on a smaller scale, also goes back to the early 20th century with important links to Europe. (However, all foreign investors saw their holdings expropriated during the nationalization process following the Ethiopian Revolution of 1974; foreign investment resumed in the mid-1990s.) European companies remain among the most active in the Ethiopian horticulture sector, for example.[15]

Contract transparency

Another key trend is the lack of transparency around the deals. This has hampered efforts by researchers to create a comprehensive inventory.[16] While the World Bank included 132 projects in its inventory, Sudan's Ministry of Investment lists (partial) details of 11 on its website.[17] Similarly, the Ethiopian government includes details, including copies of signed agreements, for just 24 projects (domestic and foreign) on its Agricultural Portal website, a notably small proportion of the 406 noted above.[18]

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The IIED and World Bank reports indicated constraints on the collection of data in Sudan, and similarly the NPA study faced difficulties gathering documentation in South Sudan. In part, this appears to be a question of access. However, confidentiality concerns may also have been raised by corporate investors, acting as a constraint on sharing contracts. In Ethiopia, the government has said that capacity constraints at the relevant ministries are hampering its ability to document and disclose details of contracts.[19] In Sudan and Ethiopia, the World Bank and IIED noted that resource constraints limited the capacity of state, local and national-level agencies – all of which might be involved in regulating a land investment. This has made it hard to achieve a clear picture of the process.

14 South Sudan's trajectory and international relations are still emerging, but have become a key development to watch since July 2011.
15 See Markakis (2011), pp. 260–62.
16 See Cotula et al. (2009) and World Bank (2011).
17 See Sudan Ministry of Information website, English-language version: http://sudaninvest.org/English/Projects-Agric.htm.
18 See Ethiopian Agricultural Portal website: http://www.eap.gov.et/index.php?q=node/835.
19 See Tigistu Gebremeskel Abza (2011).

Box 3: Emami Biotech biofuel plantation

Emami Biotech, an Indian firm, is developing a plantation for Jatropha cultivation, with the aim of exporting the biodiesel feedstock to India, while producing edible oil for the domestic Ethiopian market.

Location: The concession is for 100,000 acres (about 40,470 ha) in Oromia state, of which Emami asserts that it has taken possession of 11,180 ha.

Terms: The Ethiopian government has not published the terms of this agreement on its Ethiopian Agricultural Portal. Emami states that the agreement was signed with the relevant agency within the Oromia State regional administration, the Oromia Investment Commission, and press reports date the agreement to August 2009.[a] Although the deal exceeds the 5,000 ha threshold for direct negotiation by the federal government, it may be that the terms of the deal have been judged acceptable. Emami indicates on its website that the project is set to involve $25 million in capital outlays, and has begun initial work on the site. The company claims to have secured a 45-year, renewable lease.

Impact: There is little evidence available of the impact of the project so far. The scale of the plantation raises some questions about sustainability, given the location (reported only as 'near Awash Sebat Kilo', which lies just across the boundary of the Oromia and Afar regions, but inside Oromia territory). This area is situated between Awash National Park and a wildlife refuge. There may also be questions about irrigation using the waters of the Awash River, which could have implications for other agricultural projects (local and foreign) in the area, as well as for overall water levels.

a See *India Business Standard*, 4 August 2009, http://www.business-standard.com/india/news/emami-biotech-to-setbiofuel-project-in-ethiopia/365842/, accessed 18 December 2011.

Geographical distribution

As briefly noted above, with respect to Ethiopia, the inventories compiled by the World Bank and IIED studies contribute to an impression of the geographical distribution of land investments, which is potentially very significant in terms of their linkages and political stability. The large land investments targeted in these studies appear to be predominantly distributed in peripheral or border areas of the country (see Map 2).

Most projects are established outside the core 'highland' area of central and northern Ethiopia, which includes areas associated historically with the ethnic base of the Amhara and Tigrayan populations, as well as parts of the Shewan highland plateau. The latter is dominated by ethnic Oromo numerically although not politically, having been progressively assimilated into the political economy of the Ethiopian state since the mid-19th century. The exception is some significant investments in horticulture, which depend on air transportation and are thus situated on the central Shewan plateau within range of Addis Ababa.

Modern Ethiopia's borders were set only in the late 19th and early 20th centuries, as a recently reconsolidated monarchy, expanding out of the core Amhara and Tigrinya mountainous region in the northern and central parts of the country, and drawing on the resources of recently conquered parts of the Shewan plateau. It rapidly expanded its influence into border areas being contested with other imperialist powers, mainly Britain, Italy and Egypt, but also France. These areas were a buffer against European imperial designs, and a major source of resources in terms of agricultural outputs, slaves and natural resources. Politically most of these areas remained marginalized throughout the 20th century, under imperial and military rule, only achieving some level of local political voice after the 1991 overthrow of the regime of Mengistu Haile Mariam. Attempts by imperial and military administrations to capture or integrate the productive capacity of these areas – which are mainly either fertile mid-altitude areas or arid lowland regions – largely ended in failure. That current large-scale investments are concentrated there is a striking pattern, and one with potentially significant implications for political stability.

Focus of existing discourse

The existing international discourse, in the main, situates large-scale investment in land either in terms of a debate on developmental impacts – i.e. questions about equitability, economic benefit and sustainability – or in terms of the human rights of those whose livelihoods are affected by the projects, directly (e.g. by being displaced or losing access to a key resources such as ground water or grazing land) or indirectly (e.g. through the impact of new commercial producers on the price of a cereal in the area).

In policy-relevant research, and in some media coverage, the key questions tend to revolve around the governance of the sector. For example:

- Are the terms of land deals fair to host governments, and do governments have the institutional capacity to bargain effectively in pursuit of their interests?
- Do the mechanisms in place for governance of the sector provide for sufficient respect for the rights and interests of existing land holders/users?
- What are the motivations of foreign investors, especially sovereign wealth funds, in pursuing land investments in foreign countries? A key issue here is concern over exploitation of poorer developing countries by wealthier states, and the attendant shift in the burden of food insecurity (in the context of rising global prices) from the latter to the former.

The potential for disputes over land to feed into conflict is also considered, especially in conflict-prone or post-conflict areas.[20] Given the long and continuing history of conflict in the Horn of Africa – ranging from large interstate war and bloody civil wars to smaller-scale pastoralist disputes over pasture lands or cattle raiding – there is the potential for large-scale agricultural projects to exacerbate or create tensions over the land in question between the investors and the local population, or between local communities.

Land and security

This paper aims to refine some of these themes and consider the implications of the trends outlined above in the specific context of the Horn, particularly in Ethiopia and Sudan. The history of this region is perhaps especially important when considering the potential for disputes centred on land to feed into existing drivers of conflict at a local level, which in the context of the Horn often has linkages to security relations across the region.

The Horn of Africa has a long history of violent contestation. An important aspect of the region's history, and of its current political and economic relationships, relates to the multiple and interconnected 'frontiers' that cross it, which have been contested for centuries. A large swathe of these contested areas traces a crescent from the Ethiopia–Eritrea highland borderlands, down along the Sudan–Ethiopia border, through southwestern Ethiopia and its intersections with Kenyan and Sudanese–Ugandan borderlands, and across towards the Ethiopian and Kenyan borderlands with Somalia. Today's political dynamics can and should be situated in a long history of struggle for political dominance stretching as far back as the 17th century. To a greater or lesser extent, violent struggle continues in parts of this crescent today.[21]

Modern Ethiopia's borders were set as part of this process of struggle; the crescent described above roughly follows those boundaries. The process of the conquest or absorption of these contested frontier areas is in many areas ongoing – particularly in terms of economic and political integration.[22] Particularly since the modern boundaries were set at the turn of the 20th century, these

20 See, for example, Van Der Zwan (2011).

21 See Reid (2011), pp. 20–23.

22 See Markakis (2011).

areas functioned as a vital source of resources for the imperial regime in Addis Ababa – both in terms of the economic resources produced in or sourced from these areas and as a source of patronage, with loyal supporters rewarded with land. Despite variations in the process by which the existing polities in these areas were conquered and absorbed, a consistent theme was the exploitation by Addis Ababa of key economic resources, and the political marginalization of local populations – save through the limited opportunities of incorporation into an Amharic-speaking political elite. Settlement of 'highlanders', mainly Amharic-speaking soldiers and elites, as a reward for service or as part of the imperial administration, saw land expropriated from local groups.

> 'Given the long and continuing history of conflict in the Horn of Africa … there is the potential for large-scale agricultural projects to exacerbate or create tensions over the land in question between the investors and the local population, or between local communities'

Under previous economic and political relationships, the extent of disruption varied significantly across the frontier regions – mainly depending on the remoteness of the area and its suitability for agriculture. By the end of the imperial era in 1974, minimal progress had been made in formalizing the economy of many of these regions, especially the eastern and southern lowland areas, inhabited mainly by ethnic Afar, Somali and Oromo; the south-western Omo valley, home to a variety of small ethnic groups; and the western areas along the Sudanese border, especially what is now Gambella and Benishangul Gumuz.

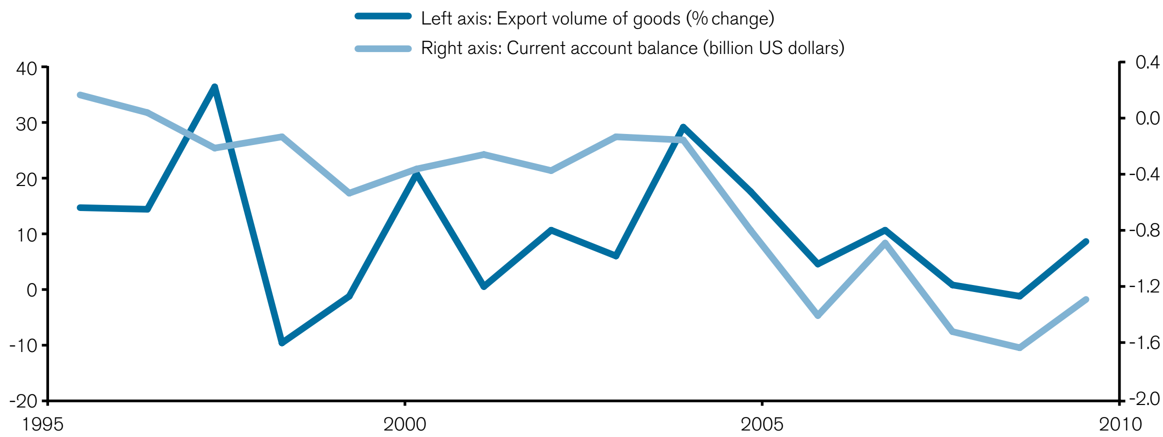
The military regime likewise made minimal progress in assimilating these areas, although two of its programmes had significant impacts. First, the regime's nationalization of land in 1974 disrupted the political economy of imperial rule and transformed political relations. A second, far more limited intervention – the resettlement of highlanders – also had some significant effects for frontier areas, particularly in western Ethiopia. Partly a government response to food insecurity, these initiatives saw a significant number of highlanders moved into Gambella and Benishangul Gumuz, where many of them and their children remain today. Attempts to establish plantation farms in some of these fertile areas, echoing imperial practice, largely failed.

Throughout the period of late imperial and military government, a number of frontier populations actively challenged central authority through insurgency – particularly in Eritrea and, from the late 1970s, in Tigray. Along the frontier, a recurring theme throughout the past century has been conflict for control of resources, including those represented by the state itself.[23] The 1991 overthrow of the government, leading to the independence of Eritrea, should be understood in this historical context. Although a 'frontier' group – the Tigrayan People's Liberation Front (TPLF), at the head of the multi-ethnic Ethiopian People's Revolutionary Democratic Front (EPRDF) – took control of the state, and its resources, it also inherited the central government's perennial challenges, including the handling of its relations with frontier areas. In addition to continued contestation along the frontiers, the EPRDF, which is still in power, is faced with the challenge of centralizing state authority and building capacity in government institutions – the key issues that occupied the attention of previous governments.[24]

23 An important body of literature has emerged since the mid-1980s, mainly grounded in social anthropology and history, analysing the effects of imperial conquest and central rule in peripheral areas. See especially Donham and James (1986); and a follow-on volume, James, Donham, Kurimoto and Triulzi (2002). Another key work is Fukui and Markakis (1994). Markakis (2011) builds on and enhances this picture. Reid (2011) was not intended as a policy-relevant study, but provides a notably useful framework for understanding the nature of conflict in the Horn of Africa.

24 Although often misrepresented as having had centuries of independent, centralized government, modern Ethiopia and its central government institutions were largely a product of the 20th century, and continue to evolve – especially in terms of their relations with rural constituents in peripheral areas.

Figure 1: Ethiopia's widening current account deficit



Source: International Monetary Fund, World Economic Outlook Database, April 2011.

The successful extraction of surplus from the agricultural sector,[25] where the overwhelming majority of Ethiopians earn their livelihood, is a crucial aspect of this process but it has proved a challenge. The EPRDF has prioritized 'agricultural development-led industrialization' in its economic policy framework since the mid-1990s,[26] and it claims significant gains in smallholder agricultural productivity. Government figures claim a 40% boost in cereal yields, with a 44% increase in area under cultivation between 1996/97 and 2007/08. Between 2004/05 and 2007/08, government figures showed that cereal production rose by more than 12% per year, and more than 6% growth in yields.[27] There is little evidence of intensification of agricultural practice, for example through use of fertilizer or improved seeds. This boost in agricultural output is at the heart of government figures showing double-digit growth in GDP in the past several years. If confirmed, Ethiopia would have achieved – apparently without much aid from modern agricultural inputs – one of the fastest 'green revolutions' in history. Although some questions remain about the reliability of the data underpinning these advances,[28] two more important considerations arise in relation to the subject of land investments.

First, there is a question of whether smallholders can deliver the surplus needed to fund government coffers. The government's agricultural extension programme has focused mainly on the 'core' highland areas of central Ethiopia, where smallholder plough-based agriculture is common, and where the core constituencies of the EPRDF (and of previous regimes) are located. Despite the increased agricultural productivity and a general trend of growing export volumes, the current account deficit has widened during the last 15 years (see Figure 1), with aid flows and remittances helping to plug the gap.[29]

Second, there is the political reality of a multi-ethnic state under the ethnic federalist system ushered in by the EPRDF, and the *de facto* differences in governance between the 'core' highland areas and in the frontier regions – what some researchers have referred to as a 'two-tier' approach to regional autonomy.[30] Under the current constitution, the country's political system is organized into regions based on ethnic identity.

25 See Eshetu Chole (2004), particularly chapter 8.

26 See Government of Ethiopia, *Growth and Transformation Plan,* 2010–14.

27 Markakis (2011) reports (p. 258), presumably also on the basis of government figures, that by 2000, agricultural extension efforts had reached 2.8 million households (about 25% of the target) and that maize yields had increased from 1,200 kg per ha to 4,700 kg, and wheat yields from 860 kg per ha to 2,930 kg.

28 See Dercon et al. (2009).

29 As Figure 1 shows, a generally positive trend in the growth of exports, primarily agricultural products, has not been able to offset the persistent current account deficit, which has only deepened as the country's import bill has grown. The government was forced to seek balance-of-payments support in early 2009; a key priority for Addis Ababa is to boost export earnings – commercial agricultural exports are among its main targets for growth.

30 See Young (1999) and Dereje Feyissa (2011).

Since the late 1990s the central government has taken a direct role in the administration of four regions – Benishangul Gumuz, Gambella, Afar and Somali – all of which comprise territory firmly at the frontier of the state. Ostensibly, lack of local capacity and problems with insecurity and corruption lay at the root of the government's motivation for intervention in these regions, which it has designated as 'backward' or 'developing'.[31] In effect, the EPRDF government has repeated the practice of the imperial and military regimes before it, although potentially with more success at strengthening some linkages (particularly economic) between centre and periphery.

Overlaid on these 'internal' Ethiopian dynamics, other important regional fault lines remain – some more active than others. The Horn of Africa has been accurately described as a security complex,[32] and three key contested frontiers remain at the forefront of this analysis:

- Ethiopia and Eritrea remain on a war footing, having failed to implement the 2002 ruling on their border that came out of the 2000 Algiers Agreement, ending two years of hostilities.
- The political 'transition' in southern-central Somalia continues to have regional security implications, with the 2004 transitional federal institutions struggling to establish a viable governance process during their (likely) final year.
- In Sudan, despite a relative increase in stability since the Comprehensive Peace Agreement was signed in 2005, significant questions remain over stability following South Sudan's independence in July.

Each of these countries has its own 'internal' fault lines as well. The history of the region is dominated by repeated direct and indirect efforts to keep neighbours off balance in order to constrain their ability to interfere in the domestic struggles under way in each country. This pattern of mutual destabilization is at the heart of regional insecurity.

Importantly, economic grievances – including, for example, over access to land – can often precede political conflict, but once political conflict begins, even at a local level, economic factors tend to reinforce those tensions. And, in a regional context of mutual interference, it need not take long for neighbours to exploit these tensions.[33]

Weaving land into conflict narratives

In this context, the geographical distribution of large-scale investments in land takes on new meaning. Given the nature and extent of the available evidence concerning the two countries considered here, one cannot be as confident about identifying a pattern in investment distribution in Sudan as in Ethiopia. Therefore, for the purposes of starting a discussion, and seeking places from which to explore further, an examination of the dynamics in Ethiopia, as described above, is probably sufficient.

Significant investments in land have been agreed along the Ethiopian side of the Sudan–Ethiopia border stretching from the western Amhara region (and even including projects in western Tigray), through Benishangul Gumuz and Gambella and into SNNPR. There are also projects strung across parts of Oromia, and investments in the Afar region. As mentioned, much of this region (not including Oromia and SNNPR) constitutes the so-called second tier of ethnic federalism, and is described by the government in Addis Ababa as lacking in institutional capacity. For the poorest parts of a poor, developing country such as Ethiopia, institutional capacity is surely a challenge in terms of local governance.

However, these regions also have in common the relatively late (and continuing) process of consolidation of control and authority by the central government. The Ethiopia–Sudan border was defined as late as 1902, and the Ethiopia–Somalia border remains contested to the present day. Along the western frontier, a range of armed movements remain active. Some are supported by Eritrea,[34] some have local agendas, while others seek

31 See Dereje Feyissa (2011).
32 See Healy (2008), pp. 40–41.
33 See Love (2009), p. 9.
34 See Young (2007); James et al. (2002), particularly chapter 14.

the overthrow of the government in Addis Ababa. These groups are mainly small, with limited military capacity, for example the Democratic Movement for the Liberation of Tigray, the Ethiopian People's Patriotic Front and the Benishangul People's Liberation Movement. There are also armed movements among the ethnic Oromo, Afar and Somali, the most significant of which are the Oromo Liberation Front (OLF, although this group is divided into multiple factions of limited military efficacy) and the Ogaden National Liberation Front, an ethnic Somali militant group still active across parts of the Somali region. Most of these movements dispute the EPRDF's narrative of development, and of genuine ethnic autonomy in the regions.

In the light of this, government-orchestrated, large-scale land projects – by foreign or domestic investors – appear to fit into an effort by the central authorities to bring these regions into tighter integration with the national economy, at the very least. Although private-sector, and sometimes foreign, investment is the norm, it is the state that stands to reap the most significant gains – including foreign-exchange revenues, taxes and associated infrastructure needed to open up the areas targeted for projects – should these projects materialize. Legislation adopted in 2009 gives the central government responsibility for negotiating land agreements of more than 5,000 ha with investors, taking this out of the hands of regional administrations.[35] Furthermore, arable land that is irrigable is the purview of the Ethiopian River Basins Authority, another central government agency.[36] From the peripheries, it probably looks like the continuation of long-running central government efforts to bring these territories – and the resources found there – under the political control of Addis Ababa.

Box 4: Shapoorji Pallonji Group

Shapooji Pallonji Group, an Indian firm trading in Ethiopia as S&P Energy Solutions, plans to grow *Pongamia pinnata (Millettia pinnata)*, a source of biodiesel feedstock, as well as cultivating and producing other edible oils.

Location: The company has leased 50,000 ha of land in Benishangul Gumuz, situated in the Guba and Dangul woredas (districts) of Metekel zone.

Terms: The 50-year lease, details of which are posted on the Ethiopian Agricultural Portal website, was signed on 1 March 2010 and stipulates a fee of 143.4 birr per ha, for an annual payment of 7.175 million birr (about $421,000). S&P Energy Solutions has been given a five-year initial grace period, with a pro-rata arrangement for land rents accrued during this period across the remainder of the lease period. A one-year down-payment was stipulated on signing the lease. The option to increase land rents after 10 years is included in the lease, but the increase is capped at no more than 20%. Under the lease, S&P Energy Solutions should have brought 10% of the total land agreed under cultivation within its first year, and the entire concession within five years. The option to renew for a further 50-year term is also included.

Impact: Alongside domestic investors, the S&P project represents a trend in investment in biofuel feedstock production in Benishangul Gumuz. Livelihoods are likely to be affected, with a negative impact on local shifting cultivators. Moreover, large-scale projects are intensifying a longer-term settlement dynamic, which has seen numerous 'highlanders' coming into the region. Although many settlers were expelled in the early 1990s, inflows have since resumed, generating local resentments. These tensions have sparked violence in the recent past, raising the prospect of a violent response to agribusiness projects.

35 See Oakland Institute (2011), p. 15.
36 See Markakis (2011), p. 292.

Government narratives tend not to dispel this image. For example, the Minister of State for Agriculture, Aberra Deresa, was quoted recently as saying:

> at the end of the day we are not really appreciating pastoralists remaining as they are. We have to improve their livelihood by creating job opportunities. Pastoralism, as it is, is not sustainable. We want to change the environment.[37]

Pastoralism – or a mixture of pastoralism and hoe-based agriculture – represents a major livelihood strategy in some of the areas where land projects are being pursued, especially in Gambella, Oromia and the Afar region. Shifting cultivation and flood-retreat cultivation – both small-scale traditional agricultural techniques practised in parts of SNNPR targeted for (or potentially affected by) large-scale investments (see Box 5) – are likewise viewed as unsustainable from Addis Ababa.

Researchers have noted the EPRDF's use of the discourse of development, the language of donors, to pursue outcomes that are at odds with what donors would recognize as 'developmental' agendas, and with democratic legitimacy more broadly.[38] Given the prevalence of such livelihood strategies in frontier regions, the seeds of land grievances and potential conflict are being sown.[39]

Moreover, current experience fits into the historical framework set out above. For example, during the imperial era, the government of Haile Selassie distinguished between *ye-gebere meret* (peasant's land) and *ye-nigus meret* (emperor's land). The latter carried the implied meaning that the land was currently unused and would be better put to use by the emperor, than if left in its current circumstances. However, this had implications for the livelihoods of groups in peripheral areas. For example, many ethnic Oromo in Arsi were forced to farm, having

Box 5: Whitefield Cotton Farm

Whitefield plans to cultivate cotton mainly for the export market. Given the remote location in the country's Omo valley, and the variety of local livelihoods strategies employed by groups indigenous to the area, there is the potential for even a relatively small project – by the standard set by some other Ethiopian land deals – to cause local disruptions.

Location: The company has leased 10,000 ha of land in SNNPR, situated in the Dassenetch woreda of the South Omo zone.

Terms: The 25-year lease was signed on 1 August 2010 and includes the option for renewal. The land rental fee is set at 158 birr per ha, for an annual payment of 1.58 million birr (about $93,000). The lease includes a three-year initial grace period; land rents built up during this period are to be paid out during the remainder of the lease. A one-year down-payment was stipulated on signing the lease. Whitefield is obligated to bring 25% of the concession under production by the end of the first year, with all 10,000 ha under cultivation by the end of the fourth year.

Impact: Almost no information is available about this project, including its precise location or the status of implementation. However, given that the Dassenetch practise traditional livelihoods, mainly herding and flood-retreat cultivation, dispossession of 10,000 ha for plantation agriculture is unlikely to sit easily with locals. Moreover, Dassenetch and neighbouring Nyangatom woreda have seen high levels of violence in the past two decades, partly as a result of the proliferation of small arms throughout the region. The potential for the project to exacerbate violence in the area would appear to be high.

37 See Fouad and Geisler (2011), p. 12.
38 See Hagmann (2010), Hammond (2008) and Markakis (2004).
39 See Markakis (2011), pp. 277–8.

had their access to grazing lands restricted.[40] This finds echoes in current concerns among Afar pastoralists, who face restrictions on access to pasture lands in the Awash valley that are being irrigated for plantation agriculture (see Box 2).

The region's history suggests that current resistance to central authority should be understood as a type of '*shifta*' behaviour, which has been a consistent strategy for centuries.[41] *Shifta* is sometimes translated as 'bandit', but this does not adequately capture the meaning: becoming *shifta* is also a way to escape central authority, and a key adaptation strategy in frontier areas.[42] The liberation movements that became the current governments in Ethiopia and Eritrea have their roots in this phenomenon. Set against the historical patterns of groups attempting to escape authority, centralized attempts to 'enclose' and capture frontier areas have also been a part of state-building, in the Horn and beyond, for centuries.[43] Understanding this allows current increases in large-scale land investments, mainly in peripheral areas, to be viewed in a more informed light.

Risks

The picture that emerges is muddled, but some important features are discernable. First, and most significantly, the recent upsurge in large-scale agricultural projects appears to be an intensification of a long-running process by which successive authorities in Addis Ababa have sought to exploit the resources of the Ethiopian periphery and more effectively bind frontier regions into the state. The significance of recent trends is amplified by the scale of resources being deployed, which exceed those the federal government is able to draw on. Involving the private sector is, somewhat ironically, enhancing the reach of the central government into the frontier, as those investments are instrumentalized for the state's economic purposes.

Being bound more tightly to the centre may bring some benefits for Ethiopia's frontier areas, such as roads, telecommunications and electricity. However, there are important concerns that while regions and administrations may benefit, many livelihoods will be damaged or destroyed – particularly more vulnerable forms of subsistence agriculture or pastoralism that lose access to key water or land resources. There is no straightforward trade-off whereby negative consequences for locals affected by projects are guaranteed to be offset by gains, such as jobs or increased food security (e.g. as a result of opportunities created by plantations).

Second, the process of large-scale investment in land is not conflict-neutral. In many, if not most, of the frontier areas along Ethiopia's borders – and also some areas closer to the 'core' highland areas, including the Afar region and parts of Oromia and SNNPR – conflict has remained a feature of the local political economy for decades. The process of state-building in Ethiopia has not halted local conflicts, and in many cases it has intensified them. The current experiment with ethnic federalism can even be said to have created new dimensions of conflict between and within frontier communities.[44] The introduction of large-scale projects that displace populations, increase pressure on other resources or otherwise undermine livelihoods will directly affect local conflicts.

Moreover, given that some conflicts in frontier areas involve groups whose agenda is driven by resistance to the state, a further dimension of risk comes from armed movements and other dissident groups picking up on the discourse of 'land-grabbing' that is prevalent in the media, and incorporating this into the narrative of their resistance to Addis Ababa.

There is evidence that this is already occurring. In 2009, the OLF criticized the horticultural schemes around Addis Ababa – i.e. in the Oromia region – as a 'continuation of the serfdom [Oromos] have been subjected to for more than a hundred years'.[45] In a recent

40 See Donham and James (1986), Introduction.
41 See Reid (2011).
42 See Reid (2011), particularly pp. 120–21 and Epilogue.
43 See Fouad and Geisler (2011).
44 See Reid (2011) and Markakis (2011).
45 Quoted in Markakis (2011), p. 292.

internet-based exchange, Anyuak Media published a statement criticizing Ethiopia's ambassador to the United Kingdom for an editorial he had posted on a UK news site that lauded the prospective benefits of Karuturi's vast project in Gambella (see Box 6). The statement accused the ambassador and the Ethiopian government of misrepresenting the state of development in the area.[46] Violence between ethnic Anyuak and the government has been sporadic during the past two decades.

The combination of grievance and efficacy in the armed movements in question is not yet at the level or scale that in the past fuelled the movements now ruling Ethiopia and Eritrea. However, violence in the frontier areas ultimately presents a risk to wider stability. As mentioned above, Ethiopia and Eritrea are actively engaged in mutual destabilization. This dynamic has fuelled insurgencies, and could do so again if they were to develop more significantly in any of these peripheral areas.

Box 6: Karuturi Global

Karuturi is based in India, and is the world's largest producer of cut roses. Its floriculture operations include farms in India, Ethiopia and Kenya. Agricultural operations are being launched in Ethiopia, starting with the production of cereal crops (maize and rice) and oil palm. The produce is intended for export.

Location: The company's existing floriculture operations are located in Oromia region, while the new agricultural land is located in Gambella.

Terms: Karuturi's concession has attracted significant media attention, mainly because of its large size. According to the terms of the agreement, dated 25 October 2010 and posted on the Ethiopian government's Agricultural Portal website, Karuturi's lease is for 100,000 ha, for a period of 50 years (potentially renewable). The cost per hectare is set at 20 birr, for an annual payment of 2 million birr (about $117,600). The agreement contains a provision for award of an additional 200,000 ha of land, if the company meets its obligations to begin cultivation on the first 100,000 ha within two years. However, this picture is contested. Media reports suggest a variety of different lease terms, costs per hectare and amounts of land. Karuturi itself maintains[a] that its concession is for 300,000 ha – which is a potential outcome, according to the official agreement, although subject to approval, and the additional land has not yet been awarded. Moreover, reports of the lease pre-date the agreement; the federal Agricultural Investment Support Directorate indicated that Karuturi's previous agreement, reached directly with the Gambellan regional administration, had raised concerns, and prompted the government to pass legislation in 2009 federalizing control over land negotiations above 5,000 ha.

Impact: The scale of the proposed operations in Gambella is enormous. The two main concerns focus on the effect on populations displaced from the land. Some employment is expected to be generated by the project. However, locals will lose access to areas previously used for subsistence livelihoods. Moreover, along with other projects in the region, there are questions as to how the project will affect the Gambella National Park.

a See Karuturi website: http://www.karuturi.com/index.php?option=com_content&task=view&id=32&Itemid=90, accessed 17 December 2011.

46 For HE Berhanu Kebede's article in the *Guardian*, see http://www.guardian.co.uk/global-development/poverty-matters/2011/apr/04/ethiopia-land-deals-food-self-sufficiency; for the response on Anyuak Media, see http://www.anyuakmedia.com/com_11_4_11.html.

Another important potential complicating factor will be the manner in which relations evolve between Ethiopia and Sudan and South Sudan respectively in the near to medium term. To some extent, Ethiopia's stance will be dependent on relations between Juba and Khartoum; a breakdown in north–south relations in Sudan would swiftly draw in Ethiopia and Eritrea in support of opposing factions.

Conclusion

Increasingly, during the last decade, the developmental narrative that dominates the Ethiopian government's interactions with its main donors and its citizens has included the message that development hinges on security.[47] As the EPRDF pushes forward with its state-building project, strong government involvement is likely to continue to characterize economic development. Given the external security challenges facing the government, and the frequent perceived alignment of strategic and security interests between Ethiopia and its key donors, it seems unlikely that significant external pressure will be brought to bear on Addis Ababa in relation to the consequences of large-scale investment in land in the country; or that, if it were, such pressure would yield significant results.

However, given the potential for existing local drivers of violence to be exacerbated by such projects, investors should be wary of the prospect of becoming embroiled in these dynamics, or caught between the state and local communities should grievances escalate into conflict.

In neighbouring Sudan and South Sudan, it is not clear that a similar dynamic applies. Certainly, Khartoum's relations with its peripheral areas remain fraught after the secession of the South. Darfur, Blue Nile and South Kordofan are in active conflict at the time of writing, although Eastern Sudan is quiescent. However, Sudan's long history of commercial agriculture, and the notable lack of foreign large-scale agricultural investment in peripheral areas, suggest a different dynamic.

In South Sudan, there have been several reports of large-scale agricultural investments, some of enormous proportions. Nevertheless, little clear information has emerged about the intentions of the would-be investors, whether they are motivated by speculation on the potential value of the land in the future, or actually intend to move forward with the mooted projects. On the other hand, South Sudan's fledgling bureaucracy is probably very poorly placed to oversee such investments. However, given the government's domination by the SPLM, the geography of reported investments may emerge as a significant issue, if these align with opposition political movements that – while co-opted at present – may more seriously challenge the SPLM for control. If alternative political power centres emerge in South Sudan, large-scale land projects could become a focal point for dissent.

> ‘It seems safe to say that conflict will be a near-term feature of both Sudanese and Ethiopian political dynamics … This contrasts strongly with the developmental agenda espoused by the government in Addis Ababa, at least, and potentially jeopardizes it’

It seems safe to say that conflict will be a near-term feature of both Sudanese and Ethiopian political dynamics. Moreover, the potential for conflict to become regionalized is a significant risk. This contrasts strongly with the developmental agenda espoused by the government in Addis Ababa, at least, and potentially jeopardizes it.

47 See Hagmann (2010).

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http://www.oxfam.org.uk/resources/learning/landrights/index.html – An archive of policy reports and research on land rights, particularly in Africa. Maintained by Robin Palmer of Oxfam.

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