

THE POLITICAL ECONOMY OF PRIVATE FORESTRY IN TANZANIA: A REVIEW

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ABSTRACT

Tanzania faces an acute shortage of timber that can only be met by private tree growers, at least in the short to medium term. The Tanzanian government in various policy document acknowledges this. However, little has happened in terms of implementation. This paper aims to explain why. Based on a review of the existing literature it argues that a combination of path-dependency and vested interests among Tanzanian state authorities and actors has rendered more fundamental changes difficult. The control over forests has been a major priority for many years, though disguised in the form of state-led management and conservation paradigms. This means that the growth of private actors, not least the non-industrial private forests (NIPF), a main focus of the paper, seems to have happened more despite state forest policies and institutions than because of them. An update of legal and institutional frameworks governing forestry is therefore needed.

INTRODUCTION

Private forestry is becoming more important in Tanzania. Whereas the state came to dominate the sector completely during the 1970s and early 1980s, a combination of privatisation, liberalisation and deregulation has opened it up to private enterprise. Forestry is no longer aimed at ensuring supplies for the domestic market and for conservation alone; increasingly, it is also a business. The importance of private-sector actors is all the more important because the country faces an acute shortage of timber in the near future (Ministry of Natural Resources and Tourism and Indufor, 2011; Ngaga, 2011; Mwakalukwa, 2016). If unmet, this demand will mean either increased reliance on imports or logging in reserved forests. This calls for increased production by all actors.

The Tanzanian authorities acknowledge the importance of the private sector: for example, the Forest Policy of 1998 explicitly states the need to develop strategies involving private-sector actors (URT, 1998). Since then, policy and strategy documents have repeated this aim, but little has happened in terms of implementation. The programmes that have indeed targeted the sector over the last few years seem to be driven more by donors than by the government. It is therefore all the more remarkable that private timber production is expanding rapidly, though more despite government policies and institutions rather than because of them.

Based on a review of the existing literature, the aim of this paper is to explain why the Tanzanian state has not engaged more actively with private forestry. It provides an overview of the development of the policies and institutions that have regulated the sector from early colonial times until today and shows how these are intertwined with broader economic policy regimes. Private forestry may cover a range of activities, from communal participatory forest management schemes to forest-related woodcutting and wood-processing industries to large-scale plantations and non-industrial private forests (NIPF). The last of these, which have received scant scholarly attention in Tanzania, as in sub-Saharan Africa in general, will receive particular attention in this paper¹.

NIPFs are important because they now account for the largest proportion of forest plantations in the country. Whereas these local tree-planters are not among the poorest citizens (Gatsby et al., 2015), improving their productivity has the potential to help improve incomes in rural areas. NIPFs are characterised by individual ownership, whether by small individual farmers, local business people or urban-based investors, but unlike industrial plantations they do not operate wood-processing plants. Furthermore, they do not necessarily include the conservation component that has been prominent in the different types of communal participatory forest management schemes and that has received significant support in Tanzania over the last two to three decades (for more on NIPF definitions, see Harrison et al., 2002). Indeed, the expansion of NIPFs also carries risks in terms of environmental degradation from monoculture and the exclusion of vulnerable groups.

The paper argues that the political economy of forestry in Tanzania is the main barrier to more supportive approaches towards private-sector forestry actors. First, the approaches of state institutions are characterised by some degree of path-dependency². Whereas plantation farming, which aims at the production and export of cash crops like sugar, tea and cotton, has had a major element of private enterprise throughout Tanzanian history (Kaya, 1989; Gibbon, 2011), forest resources have always been objects of government intervention to a greater extent. Large tracts of forests in Tanzania are still owned by or are under the control of the state. Whereas the state partly withdrew from forest industries during the 1990s, it stayed firmly in control of government plantations and forest reserves. The focus of government authorities, therefore, is mainly on managing these forests, not on facilitating private-sector actors.

Secondly, there has been an ideological tilt towards 'communities' and 'villages' whose interests needed protection vis-à-vis investors. Ironically, this has hampered the economic activities of individual villagers, as seen most markedly during the era of African socialism, when collective tree-planting in village areas and large-scale state-led plantation industries were promoted at the expense of the emerging entrepreneurial farmers (Ahlbäck, 1988). Therefore, with liberalisation, the main emphasis was on the privatisation of wood-processing industries, the opening up for large-scale tree plantations for climate change mitigation that could help attract foreign direct investment, and on participatory forest management. The latter approaches were supported generously by donors, who, at times, have provided up to 95% of government expenditure on the forest sector (Sunseri, 2005).

In short, the control over forests has been a major government priority for many years, though disguised in the form of state-led management and conservation paradigms (Sunseri, 2014). The major increase with regard to government-controlled forests happened in the mid-twentieth century, when forest reserves increased from around 1% to around 14% during the two decades following the Second World War (Sunseri, 2007a). Apart from some expansion of government plantation forests related to the SAO Hill plantation in the Southern Highlands in the 1970s and 1980s, this did not change much for long (Ahlbäck, 1988).

However, in the last two decades various conservation programmes, especially in coastal areas, have led to further increases in government-controlled preserved forests (Alden Wily and Dewees, 2001; Benjaminsen and Bryceson, 2012). The management of all these forests has been a source of revenue for the forest authorities through the selling of harvest permits and the collection of royalties. It has also proved valuable for corrupt forest officials, who have allowed harvesters to bypass the regulations (Kitabu, 2014; Ministry of Natural Resources and Tourism and Indufor, 2011; Mwamakimbullah et al., 2016; Chenga and Mgaza, 2016). This may also help explain why less attention has been paid to private forestry and NIPF in particular.

This paper is based on a review of the relevant literature identified through searches in WorldCat, the world's largest network of library content and services. The search phrases 'Tanzania', 'forest', 'plantation' and 'biofuel' were combined, with

‘Tanzania’ and ‘forest’ alone resulting in 1223 articles, books and book chapters. Of particular interest in the sorting and analysis of this material has been literature that could help shed light on forest policies, governance issues and the role of private forestry in the sector. In order to obtain a better understanding of how forestry, post-independence, was transformed into the peculiar mix of state control and private enterprise that still to a large extent characterises the Tanzanian forestry sector today, the scholarly literature has been combined with the available ‘grey’ literature, that is, consultancy reports, government strategies, etc.

In order to synthesise this material, the paper is structured around landmark policies, that is, the emergence of new policy paradigms that require not only adaptation, but significant political and administrative effort to implement (see Hall, 1993; Kjær and Therkildsen, 2012). The latter distinction between policy and implementation is important because it may help explain why the repeated acknowledgement of the importance of the private sector in policy documents over the last two decades (see URT, 1998; URT and TFS, 2014; URT, 2008) has not had much effect on the actual practices of state institutions.

FORESTRY IN THE COLONIAL ERA

Whereas some trade in timber products – first and foremost copal, but later also rubber for international markets – can be observed during Zanzibari rule over the coastal hinterland, the systematic establishment of government forest administration and government-controlled forest reserves only began under German colonial rule. Historically, such attempts to regulate the cutting of trees in forests served several purposes, all of which can be found today, but to varying degrees. First, it aimed to secure timber supplies, initially for fast-growing urban centres and place-specific infrastructural projects, but later also on a national scale. Secondly, this also meant preserving forests that were in productive use, but combined with some emphasis on the conservation of vulnerable forests. Finally, there was the potential for cash-strapped governments to secure revenues from timber production (Wily, 1999; Sunseri, 2005). Cash-crop plantation farming was practised by German settlers as early as 1885, but the emergence of a major private-sector component in forestry only arrived later in this period.

The interventions to regulate forest use led to some ambiguity between protecting forests on the one hand and allowing local communities living in or near forests to undertake some economic activities in them on the other. Already in the early 1890s the Germans restricted tree cutting, systematised tax collection and laid the foundations for future attempts to bring forest use under government control, primarily through the German East African Forest Ordinance of 1893 (Sunseri, 2007b; Sunseri, 2014). This was followed in 1895 by the *Kaiserliche Verordnung*, a land ordinance that sought to systematise European land ownership in the colony and, not least, to facilitate the farming of cash crops on plantations (Sippel, 1996). The first forest administration, established in 1898, mainly targeted mangrove forest resources in the Rufiji Delta, some of which was granted as a concession to a German businessman in the same year. The latter introduced sawmills and helped reform existing timber trade practices that were perceived to be ‘irrational’.

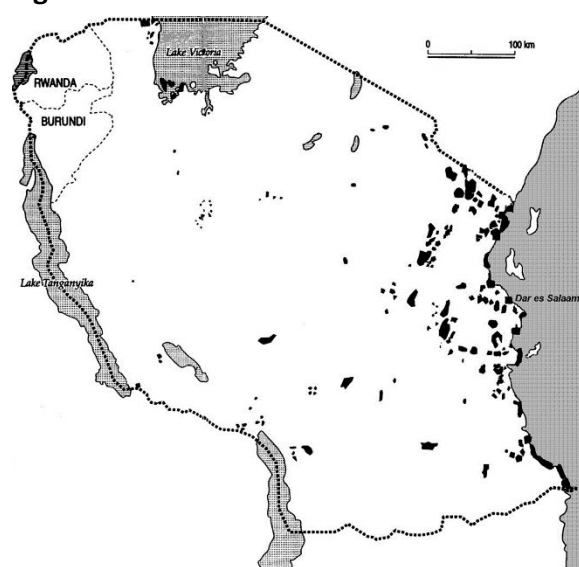
Scientific forest research began in 1902 with the establishment of a research station and a botanical garden at Amani in the East Usambara Mountains (Mungure, 1983; Ahlback, 1986). In 1904, under a new Forest Ordinance of that year, all coastal mangrove forests, covering 34,600 hectares in all, were either given in concessions to investors or used by the Forest Department. That year, a total of 750,000 ha were declared to be forest reserves in which no other economic or settlement activities were allowed. This loss of access and control caused significant resistance and contributed to uprisings and rebellions by the local populations during these years. The changes in forest policy and practice were decisive in fuelling the resistance that led to the Maji Maji rebellion in 1905 (Sunseri, 2002). However, the expansion of forest reserves continued, increasingly to protect water catchments, reaching 1% of the total area of the colony by 1914 (Ylhäisi, 2003; Sunseri, 2014).

The attempts to regulate land and forest use continued in the British period. In the 1920s, under the impression of the rapid exploitation of forests around Tanganyika’s major cities, especially Dar es Salaam, the British authorities initiated tree plantations by planting fast-growing species for domestic consumption. Under

the 1921 Forest Ordinance, which was based on a similar ordinance in Kenya, they also placed restrictions on access to and use of forest products in order to protect forest resources. Conservation to protect water catchment areas was introduced with the 1933 Forest Ordinance (Lovett, 2003). However, the forest reserves only expanded a little in the inter-war years.

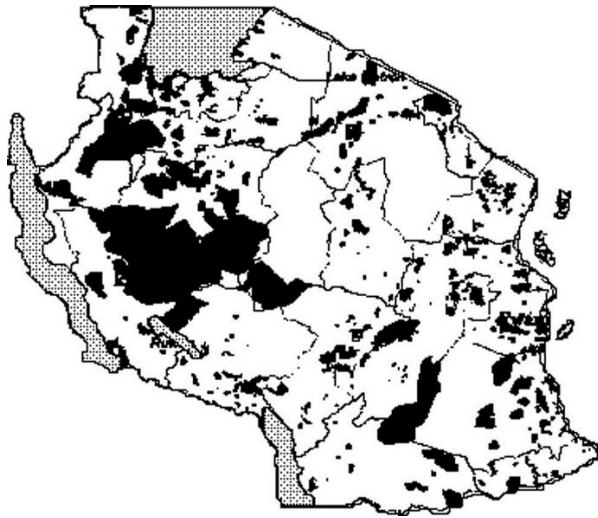
Immediately after the Second World War, an intervention was launched to increase the reserved forests under government protection from around 1.4% to 14.6%. This was a response to what was anticipated to be increased domestic and international demand for timber products (Sunseri, 2014). The Forest Department, which had been rather insignificant, gradually gained in importance, and the goal was reached within a decade and a half. The introduction of a Forest Policy in 1953 and a Forest Ordinance in 1957 coincided with the increase in government-controlled forests during this decade (Ahlbäck, 1988; Sunseri, 2005). The main focus of the legislation was increasingly on the preservation of government-controlled forests, which made up around 30% of forested land in the territory towards the end of the period (Kowero, 1990a; Conyers, 1969).

Figure 1 Forest reserves 1945



From Sunseri 2007

Figure 2 Forest reserves 1961



From Sunseri 2007

The authorities' perception of the role of local communities was ambivalent throughout the period. On the one hand they often allowed communities to carry out some economic activities in the forests, while on the other hand maintaining that conservation and the supply of timber was of the greatest importance (Sunseri, 2005). The 1921 Ordinance was strict in limiting non-licensed access to forest reserves, but it was considered not to be in the spirit of the League of Nations Mandate and was therefore amended to recognise the right to harvest forest products (Lovett, 2003). Nonetheless, persistent attempts to resettle woodland dwellers into more compact settlements in order to promote development were made in the following decades. Most of the expansion of government-controlled forests from the late 1940s onwards was meant to put existing forest resources to more productive use, but it displaced thousands of people who were using it already (Sunseri, 2005, 2007a and 2007b). It made little difference that some forest reserves dating back to 1952 were classified as 'native authority forests' (Ahlbäck, 1988).

The government's approach to the emerging private-sector wood industry actors was similarly ambivalent. On the one hand, illegal logging was increasingly seen as a problem and the Forest Department struggled to regulate activities. From the 1930s, entrepreneurial African pit-sawyers, sometimes collaborating and sometimes competing with small-scale entrepreneurs of Asian and Greek origin, increasingly supplied the domestic market with wood products from existing forests. While licences to take high-value trees were reserved for the more mechanised operators, who were mostly of foreign descent, Africans cut the less valuable species. Arson and other types of resistance became more common as reactions to government-imposed restrictions (Sunseri, 2007a).

On the other hand, at around the same time, however, in the late 1940s, some larger projects took off promoted by the colonial authorities. The British Steel Brothers, whose teak production in newly independent Burma was coming under pressure

from nationalisation, were granted a major concession to cut valuable local hardwood species in the Rondo Forest, which had been reserved by the Germans. By acquiring a 50% share of operations, the colonial authorities expected to generate handsome revenues (Sunseri, 2007a), which were likely to be used to help finance the expansion of government forestry activities elsewhere, already mentioned. The Forest Department also opened sawmills, in particular to satisfy the demand for sleepers from railway construction projects during this period.

The authorities' approach to private or semi-private plantation forests appears to have been more supportive. In 1948-49, in the Southern Highlands the Colonial Development Corporation (later Commonwealth Development Corporation and now merely CDC Group), a British colonial investment financing entity, took over a nascent tannin production project of a cash-strapped private company, FORESTAL, a world leader in producing vegetable tanning extract from trees for the leather industry, on request from the Colonial Government (Tyler, 2009). Such collaboration between state authorities and international development organisations to establish plantation forestry became more common in the following decades though from the 1960s largely undertaken by state forest departments (Jacovelli, 2014).

The Tanganyika Wattle Company got 18.000 ha of land, which was compulsory acquired. The populations only later got compensated in cash. Of this, 13.500 ha were used for wattle and the rest for pine and mixed crops (Voll, 1980). Tanwat also helped establish an adjacent 4000 ha outgrower scheme financed by the Tanganyikan government. Another tannin project, in the West Usambara, materialised in the 1950s. Linked to the Giraffe Extract Company this involved 4586 ha, primarily involving smallholders and possibly local authorities, and, from 1975, also a 350 hectare government plantation (Kihyo and Kowero, 1986; Kessy, 1987; Boland 1997). It is unclear who initiated this project.

THE EARLY POST-INDEPENDENCE PERIOD: FROM PEASANT AGRICULTURE IN THE 1960S TO INDUSTRIALISATION IN THE 1970S

After independence, the emphasis on fast-tracking economic development meant that forests were increasingly valued as an economic asset. However, this did not mean that the forest sector had much traction politically in the early years. Until 1971, forestry was administered under the same ministry as agriculture, an arrangement in which the forestry sector lost out. In the 1960s, several reserved forests were deregistered to allow for farming. With the adoption of the Arusha Declaration of 1967 – the main policy document of the period, which guided the country on its path towards African Socialism – this gradually started changing. The Declaration stated that the means of production and exchange – including land and forests – should be ‘controlled and owned by the peasants through the machinery of their government and their co-operatives’ (Nyerere, 1967a). Fast-track modernisation was initiated throughout the economy.

Post-Arusha, a dual approach was applied to the forestry sector. On the one hand, a programme to promote village forestry began in 1968 due to concerns over a lack of fuelwood and soil degradation (on the village as a development imaginary, see Box 1). On the other hand, large-scale industrial plantations were established, including a state-owned sawmilling and wood-processing industry that also aimed to increase exports (Sköld and FAO, 1969; Ahlback, 1986). Government plantation forests expanded during these years, peaking at the end of the 1970s with the planting of more than 7000 hectares in 1978/79, of which 6423 hectares were in the Sao Hill plantation (Ahlbäck, 1988). When compared to the not so distant 1963 Forest Policy (a minor revision of the colonial Forest Policy of 1953) and its dual emphasis on domestic supply and conservation, this marked a major adjustment of the mode of operation in the sector (Adeyoku, 1976).

Box 1 The village as a development imaginary in Tanzanian forestry

Since independence, the idea of ‘the village’ has held a strong place in the Tanzanian imaginary, with important implications for forest policy interventions. In the early years, in particular with the proclamations of the Arusha Declaration and of African Socialism in 1967, the village became a site for organising the great majority of the population living in rural areas. However, in many areas people lived in scattered settlements, and villages had to be constructed through state intervention. Two concurrent policy goals were pursued through this Ujamaa or ‘familyhood’ approach: the improved delivery of social services in villages, and the establishment of agricultural production units on a larger scale than traditional family farming. This also acted to eliminate the emerging entrepreneurial farmers, who owned ‘10, 20 or even more acres’, but were disliked by the then President Nyerere. These farmers, he argued, promoted exploitative relations in rural areas and undermined the advent of socialism (Nyerere, 1967b, p 8-9). The preferred

modes of intervention in Tanzanian forestry, therefore, were either different types of collective village forestry or large-scale state-owned industrial plantations.

Two major afforestation campaigns were introduced, one from the late 1960s onwards and the other in 1980-84, but with limited success. Official figures suggest that the two programs combined resulted in the planting of trees on an area of up to 115,000 hectares over the years, less than half what was needed in order to achieve fuelwood self-sufficiency. However, statistics from the period are highly unreliable, and Ahlbäck, one of the more reliable sources on Tanzanian forestry during this period, estimates that the real figure was closer to 50,000 hectares (Ahlbäck, 1988). A number of reasons for the failure are mentioned in the literature. Due to the communal character of the projects that were promoted, it proved hard to mobilise the labour required for their implementation. The coercive character of the villagisation programme during the 1970s – Ujamaa came to denote one of the biggest resettlement exercises in modern African history – did not exactly help promote people's sense of ownership of interventions in rural areas, and occasionally people even set fire to the woodlots (Scott, 1998; Schneider, 2004 and 2014; Sunseri, 2014). It also contributed to later deforestation problems (Friis-Hansen, 1987).

Furthermore, the programs were typically designed by foresters with little or no experience of extension. They were therefore based on the principles of industrial plantation similar to the 'scientific' forestry approach that had been fashionable in colonial times (Mgeni, 1992; Sunseri, 2007a. For scientific forestry, see also Scott, 1998). Implementation processes were dominated by the central government authorities, and the influence of local people on forest activities therefore remained limited (Eriksen, 2000; Warner, 1993). In this respect, the more participatory approaches that were introduced on an experimental basis in the 1980s and were institutionalised in the Forest Policy of 1998 marked a significant change. Now, people were supposed to help define and manage forests in their own areas in a less top-down manner. However, here too ideals and practice proved hard to reconcile, as conservation was a centrally defined goal, and user influence remained limited (Nathan, 2003. See also box 4).

The new thinking dictated what has been termed an 'extraction' approach to forestry, in which production and outputs were maximised (URT and Ministry of Agriculture, 1968; Mungure, 1983). This was only deemed possible through large-scale plantation projects led by the state, and it implied a reduced emphasis on conservation. For instance, interventions were now aimed at increasing charcoal production for domestic as well as for export markets through production in steel kilns and the establishment of a modern factory around 1970, first under the Ministry's Forestry Division, and later under the Tanzania State Charcoal Industry (Sunseri, 2005). For this and for more traditional sawmill production, forest

clearances reached what many forest officers perceived to be unsustainable levels (Hurst, 2003). To some extent, however, this was also followed by the subsequent planting of fast-growing tree species.

The change to more state-centric approaches through parastatal organisations was begun by the Forest Division under the Ministry and the National Development Corporation (NDC), being reinforced with the establishment of the Tanzania Wood Industry Corporation (TWICO) in 1971. TWICO became the main parastatal coordinating the development of wood industries in Tanzania, and it came to own a number of sawmills (Ahlbäck, 1988). However, its establishment did not mean NDC withdrawing from the sector. In 1973, NDC embarked on a wood-based industrial development plan, first by itself starting a fibreboard factory, and then in 1985 the Southern Paper Mills Company, a new subsidiary under NDC in Mufindi, started production using wood from the Sao Hill plantation, at that time the biggest ever industrial development project in Tanzania (Ahlbäck, 1988; Hurst, 2004). However, around 1980 the expansion of government plantations almost came to a halt and the expansion of state-owned enterprises slowed down, as donors withdrew their support (Hurst, 2004).

The role of the private sector declined correspondingly during the period. Until the late 1960s, the wood industry had been dominated by private actors, but the establishment of sawmills and wood-processing factories by government entities was the order of the day, and nationalisations became increasingly common (Svejnar, 1973; URT and Ministry of Agriculture, 1968; Hurst, 2004). Though the number of sawmills had gone up from around forty in 1969 to around a hundred in 1986, by far the largest production volume occurred under TWICO (URT and Ministry of Agriculture, 1968; Ahlback, 1986).

During the same period, the remaining private forest plantations were hit by government policies that made them uncompetitive on the world markets. Squeezed by high fixed exchange rates a company like Tanwat, still in the hands of CDC, increasingly aimed at producing for the domestic market, starting with planting 5000 ha of pine and eucalyptus and establishing a sawmill around 1970, and establishing Tanzania Seed Co (later taken over by the government) in 1973 (Tyler, 2009). Similarly, the wattle NIPFs on the northern part of Tanzania, typically smallgrowers with less than 2 hectares of trees, who delivered inputs to the Giraffe Extract Company (which had been taken over by TWICO) in Lushoto, increasingly abandoned the production of wattle barks and focused on growing trees for fuelwood or diverted to other cash crops due to the uncompetitive prices on offer (Kihyo and Kowero, 1986).

ADJUSTMENTS AND THE ADVENT OF THE BIODIVERSITY PARADIGM IN THE 1980S AND EARLY 1990S

The 1980s and early 1990s were characterised by some changes in the forestry sector, though these were rather slow. In line with the new 'sustainable development' agenda that became prominent with the publication of the UN Brundtland report on environment and development in 1987, the emphasis in Tanzanian government policies and interventions gradually reverted back from expanding production to conservation and the management of existing resources (Eriksen, 2000; Ahlbäck, 1988). A combination of domestic and external factors drove the change. A series of donor-funded forest inventories was initiated by the Tanzanian government and donors from 1978 onwards, which demonstrated that the cash-strapped Tanzanian authorities had been unable to monitor or enforce the boundaries of forest reserves. Deforestation, it was felt, had reached alarming rates and threatened not only biodiversity, but also the future supply of wood products (World Bank, 1999; Hurst, 2004, p. 161; Sunseri, 2005). Another major village afforestation campaign, 'Miti ni Mali' (Trees are Wealth), was initiated, aimed at preventing the depletion of woodland resources, but again it met with only limited success (Ahlback, 1986 and 1988; Warner, 1993).

The biodiversity and participatory forest management agendas came to dominate in the following decades. The need for change was acknowledged in the draft Forest Policy of 1986, which led to a gradual reform of forest management in village areas, first towards more deconcentrated and project-based decision-making (Ahlbäck, 1988; Holmes, 1995), and later towards a greater degree of devolution of control over the provision of services, which had traditionally been highly centralised (Nathan, 2003; World Bank, 1999). These changes aimed at altering the relations between the forest administration and local communities, which had otherwise often been tense, perceived by forest officials as irregular infringements on protected forests by the local population on the one hand, and experienced by the latter as forceful expropriation and eviction with limited or no compensation on the other.

The 1986 draft sought to extend the regulation of forestry to cover village land forests as well, but with an emphasis on 'ethics', i.e. conservation and biodiversity. This agenda received significant support from donors and international NGOs (Hurst, 2004, p. 161; Sunseri, 2005. See also box 3). A number of donor-funded pilot projects took off aiming to reconcile biodiversity goals with increasing public participation in forestry, which had until then been dominated more by the idea of 'scientific' (top-down) forestry (Lantbruksuniversitet, 1992; Kajembe and Kessy, 2000; Lovett, 2003).

However, the formulation and implementation of reforms during this period were characterised by a large degree of path dependency, and changes were slow. The 1989 Forest Action Plan was developed by technical experts in a rather top-down manner, first catering to the development of a national plan, and then district and regional plans based on it (Frederiksen, 2010). Some experimentation with increased

participation by communities began with the Forest Resource Management Project in the early 1990s, which was initiated to strengthen institutions, improve participation and implement forest policies. The latter was also linked to the reform of the Tanzanian Land Policy, which began in the same period (Tanzanian Ministry of Lands, 1991; URT, 1994). However, the new draft Forest Policy, which was introduced in 1986, was only passed in 1998, perhaps a sign that some of these agendas were being driven by donors rather than Tanzanian decision-makers.

The government-controlled forest industries enter into a deep crisis during these years. Government entities still had a *de facto* monopoly on the production of a number of the most important timber products throughout the 1980s. Though these enterprises had been the dominant commercial actors since the early 1970s, they had been mismanaged. In TWICO, the ties to the state and the ruling party meant that non-commercial interests in the form of patronage influenced operations (Hurst, 2004, p. 70). A company like the Giraffe Extract Company, for example, reduced its capacity utilisation from 65% in 1975 to 13.8% in 1982, but increased employment from 101 to 129 over approximately the same period (Kihyo and Kowero, 1986). The wood industries were characterised by an 'almost complete lack of trained manpower at both managerial and technical levels' (Ahlback, 1986, p. 73).

The government plantations fared slightly better, displaying mixed results in terms of administrative performance. Overall, it proved difficult to reconcile the dominant practices of central planning and resource allocation with decisions that were better being taken at the local level (Mgeni and Price, 1993). Among donors, Finland, Sweden, Norway and China seem to have supported these industries in different ways until the mid-1980s, but they then withdrew (Lovett, 2003). Though the lack of development of the state-owned forest enterprises is often depicted as due to a lack of financial resources, the existing sawmilling capacity was underutilised (Kowero, 1990a and 1990b), suggesting rather management problems and a lack of coordination. As a result, the sector's contribution to the national economy remained limited.

The shortage of capital in the parastatal sector meant that the state increasingly reneged on the demand for majority control over companies (Mukandala, 1989). This slowly paved the way for larger private enterprises. The paper mill at Mufindi closed in 1994, and the Sao Hill sawmill, having struggled with productivity for a long time, was leased to a Norwegian consortium at around the same time (Hurst, 2004, p. 183-184).

The advent of the private sector as a response to the low productivity and management problems thus came rather late in the period and was far from whole-hearted, as the ruling party and government were split internally (see Box 2). The draft Forest Policy of 1986 did not even mention the facilitation of private-sector actors as an objective. Soon, however, the concept started appearing in policy documents, but policy remained unclear regarding the role of the private sector (Kowero, 1990a). For long, 'private actors' were first and foremost conceived as being villages (rather than villagers), communities or NGOs supporting the government in achieving its objectives (Kajembe and Kessy, 2000; World Bank, 1991;

Ylhäisi, 2003). Only from the middle of the 1990s could a substantial change in the role of the private sector, involving some liberalisation and privatisation, be observed (Chamshama and Iddi, 1996; Hurst, 2004, p. 190). However, this only applied to the forest industries, as the plantations remained in government hands. Some large private plantations were established during the 1990s (discussed in more detail below), but overall the more market-oriented entrepreneurs and investors, especially the non-industrial ones, were still largely left to their own devices.

Box 2 Privatisation of forest industries

Though liberalisation gradually gained pace after the structural adjustment programme negotiated between the Tanzanian government and the IMF in 1986, privatisation only really gained speed in the last half of the 1990s (Gibbon, 1999; 4ff). Internally in the ruling party, Chama Cha Mapinduzi (CCM), and the government, there were struggles between reformers and state-centric traditionalists (Lofchie, 2014). It therefore took years to get the legal and institutional framework in place. The privatisation of industries was made possible by the National Investment (Promotion and Protection) Act of 1990, which protected foreign investments from nationalisation without compensation and offered investment incentives through the establishment of the Investment Promotion Centre, later the Tanzania Investment Centre (TIC) (Chachage, 1995; Chachage, 2009; Gibbon, 1995; Gray, 2013). In 1992, Tanzania ratified the International Convention on the Settlement of Investment Disputes (ICSID), which allowed foreign investors to sue Tanzania if it breached the agreed conditions. The ratification was later confirmed in the Tanzania Investment Act of 1997 (Kweka, 2009; Cosmas, 2014). The Parastatal Sector Reform Commission (PSRC) was established through the Public Corporation (Amendment) Act of 1993, which governed privatisation.

In the forestry sector, however, only the wood industries were privatised; the plantations remained state-owned. The list of privatisations below has been drawn up based on information in the available literature:

- 1995: 70% of Imara Wood Product to unknown local buyer.
- 1995: 100% of Mkata Saw Mills to unknown local buyers.
- 1996: Unknown portion of Rubber Plantations sold to unknown Tanzanian company.
- 1997: Unknown, but controlling share of Southern Paper Mills Mgololo (Iringa) sold to ABC Limited, a little-known American company.
- 1998: 100% of Sao Hill Sawmill (part of TWICO) sold to Escarpment CO (ultimate owners Fjordgløtt from Norway, with Norad supposedly involved in facilitating the deal). In 2003, Green Resources buy and reopen Sao Hill Sawmill.

- 2004: Mufindi Paper Mill privatised and sold to the Rai Group of Kenya.

(Gibbon, 1999, Hurst, 2004, Purdon et al., 2015)

COMMUNITY CONTROL AND GRADUAL LIBERALISATION FROM THE LATE 1990S UNTIL TODAY

From the mid-1990s onwards, the forestry sector was gradually liberalised. Whereas the previous period was characterised by experiments and mental adjustments to a new economic reality in which the state was no longer driving the economy, the actual transfer of control to other actors had been limited. Towards the end of the 1990s, however, villagers' gained more *de jure* control over land and forest resources. Wood industries, which were run down and need investments, were leased out and then fully privatised (FOSA, 2000). The changes were gradual and did not take the form of a wholesale neoliberal onslaught. Nonetheless many of these changes and privatisations remain controversial in Tanzania to this day³. Apart from the privatised sawmilling and wood products companies, which came to dominate the manufacturing sector completely (Ngaga, 2011), the role ascribed to private-sector actors in the forestry sector remained ambiguous.

For a long time, the private sector tended to be viewed as a new element that could help the government achieve its objectives of conservation and control. The continued emphasis on participatory forest management reflected this perception. Only quite recently does it look as if other private-sector actors, in particular among the non-industrial NIPFs, are being recognised as actors that can make contributions to society in terms of production and livelihoods in their own right. This may reflect the fact that NIPFs have now reached a scale where they surpass both the government's and large-scale private plantations in terms of acreage and soon also production (Mwakalukwa, 2016). These changes, however, are not yet reflected in the legal and regulatory framework.

In village areas, the most dramatic regulatory change came about with the *de jure* transfer of control over forest resources in village areas to village authorities. This process began with the Forest Policy of 1998 and was fully institutionalised by virtue of the 2002 Forest Act, which granted the right to manage forests on village land to village councils (Ministry of Natural Resources and Tourism, 2006; Ylhäisi, 2003). This was the first major reform in the forestry sector since the 1953 Forest Ordinance, which had allowed higher-level authorities to overrule local priorities more easily and did not put much emphasis on village forestry (Ahlback, 1986, p. 86). An important precondition for this transfer of power to the local level in 1998 was the passing of the Land Policy of 1995 and the Land Acts of 1999, which vested the control of land in democratically elected village authorities (Wily, 2003; Majamba, 2012; Pedersen, 2013).

The new Forest Act operated with different categories of forests, namely national forest reserves, local authority forest reserves, village forests and private forests. Villagers could become involved in two types of forest, namely village land forest reserves on village land, and joint forest-management agreements between villages and the district and national level authorities (Mustalahti and Lund, 2009). The Act provided for more village control than in most other countries in the region (Wily, 1999; Majamba, 2012; Wily, 2001; Purdon et al., 2015; Luukkanen et al., 2006).

Under the new Forest Act, village councils could prepare village land forest-management plans in consultation with local citizens and manage their forests accordingly. First, however, in order to take full control of their land and the natural resources on it, villages had to demarcate their boundaries and obtain a village land certificate that mapped and certified them. They could then form a village land forest committee to manage forests and make byelaws. Moreover, for the management of national and local authority forest reserves, as for village forests, joint management agreements between local community groups, village councils and district councils could be established (Majamba, 2012; Luukkanen et al., 2006; Blomley et al., 2010). These provisions retained some checks on the powers of village councils, which still had to involve and seek approval from the District Councils and the Director of Forestry. They also pointed to the limits of the transfer of control over forests to the local level. A host of programmes and projects to implement the reforms were based on the perception that conservation and participation go hand in hand (see Box 3), as with the National Forestry Programme of 2001 and the Forest Conservation and Management Project of 2002. The title of a 2001 World Bank Working Paper written by influential scholars was quite revealing in this regard: ‘From users to custodians’ (Alden Wily and Dewees, 2001).

Box 3 The village as a conservation unit: participatory forest management and REDD+

Around 1980, it was realised that the main existing approaches to forestry had severe shortcomings. It was increasingly realised that, without greater involvement by local communities, afforestation programmes and efforts to reduce encroachment would not have much effect. Donors, in particular Sweden’s SIDA, helped set the new agenda through conferences, reviews and evaluations, often in collaboration with the forest authorities (Hurst, 2004; Wily, 1999). Thaddeus Sunseri describes the emergence of a ‘preservationist alliance’ from around 1980 consisting of development donors, NGOs, researchers and, with time, government forestry officials, which changed the main focus of Tanzanian forestry from production to conservation (Sunseri, 2005. See also Lund et al., 2016a). In the Tanzanian forestry sector, the agenda was introduced through pilot projects in the 1980s and 1990s and became institutionalised with the Forest Policy of 1998 and the Forest Act of 2002 (Brockington, 2007; Ylhäisi, 2003).

The increased emphasis on involving communities in Tanzania’s villages was popular with donors and produced new funding. For instance, the participatory forest management agenda was reinforced in 2005 by the UN initiative on ‘Reducing Emissions from Deforestation and forest Degradation (REDD; from 2007 REDD+), which linked up with the global climate change agenda. In village areas of Tanzania, REDD+ was essentially to be implemented through the existing legal framework, and it shared many of its conservation objectives, now being achieved through payments for

ecosystem services (Majamba, 2012; Robinson et al., 2013; Kulindwa et al., 2016). The Tanzanian process initiated in 2008 came to mirror many of the experiences of the recent

past. It was heavily donor-supported – Norway and Finland had now taken over as the main donors – and large sums of money were spent on drafting new regulations, initiating pilot projects, etc. The availability of donor funding seems to have become a precondition for implementation (Mustalahti and Lund, 2009; Lund et al., 2016b).

Despite the hype, the outcomes turned out to be ambiguous or downright disappointing. Large areas – according to official estimates, 7.5 million hectares by 2012 – had come under participatory forest management. However, the official statistics may be inflated and do not necessarily reflect implementation on the ground, which has often been project-driven, with limited impact on a larger scale (Lund and Treue, 2008; Lund et al., 2016b; Orbicon and Gilroy, 2007). Furthermore, while driven by good intentions such interventions may create land use conflicts (Scheba and Rakotonarivo, 2016). Some scholars have pointed out that forestry remains dominated by government officials, not least when it comes to joint forest arrangements (Ylhäisi, 2003). This also means that there may be vested interests at all levels in maintaining the status quo, sometimes for reasons of personal enrichment (Eriksen, 2000; Mustalahti and Lund, 2009; Lund and Treue, 2008; Brockington, 2007; Mrema, 2017). These outcomes suggests that the Tanzanian authorities may have accepted the new participatory approaches because of the availability of donor funding, which at times has made up 95% of government expenditure on forestry, rather than out of genuine interest (Kajembe and Kessy, 2000; Sunseri, 2005; Robinson et al., 2013).

The continued emphasis on conservation has also been criticised for being a land grab in disguise. In theory, the approaches embodied in Tanzania's legal framework have empowered communities to manage forests through village governments (Alden Wily and Dewees, 2001), but they have also increased the acreage of reserved land with restrictions on its use. The conservationist interventions could also be used to circumvent the protection against involuntary land acquisitions that the Land Acts had provided villagers since their enactment in 2001 (Nelson et al., 2012; Tenga and Mramba, 2014; Pedersen, 2016) by taking some control away from communities over ever larger swathes of land. According to Benjaminsen and Bryceson, this has particularly been the case in coastal forest areas (Benjaminsen and Bryceson, 2012), which have experienced the first major expansion of reserved forests since the colonial program in the two decades following the Second World War⁴. Similar trends can be observed in the expansion of areas that fall under the Wildlife Division (Hurst, 2004, p. 220; Bluwstein and Lund, 2016).

Apart from village forestry, however, the growth of the private-sector component of Tanzanian forestry during this latest period happened more through the removal of restrictions in forest and forest-related legislation than through direct facilitation. Though the Forest Policy of 1998 acknowledged the need for more active engagement with the private sector through ‘strategies for active participation of these other stakeholders [the private sector, ed.] in the development and management of forest resources [which] are yet to be developed’ (URT, 1998, 12), the 2002 Forest Act is largely silent on private actors, apart from prescribing the procedures for how to apply for concessions in government-controlled forests (URT, 2002).

The establishment of new plantations, whether large-scale private plantations in the 1990s and 2000s or as NIPFs in the 2000s, was facilitated by the Land Acts of 1999, which set out the procedures for acquiring land. In particular, small-scale and medium tree-planting activities appear to have occurred as rather autonomous processes (Aalbaek, 2001). This located the new plantations on land that had not previously been reserved for forestry and which was therefore largely out of the reach of the ministry responsible for forestry (Ngaga, 2011, see also box 4). The privatisation of wood-processing companies resulted in the complete withdrawal of the state from forestry-related industries.

In fact, the Forest Act focused more on restricting the activities of non-state actors than on promoting them. For instance, in the Forest Act’s section on trade in forest products, the emphasis is on ‘prohibition’, ‘restriction’, ‘authorization’, ‘inspection’, ‘control’, etc. (paragraphs 58-64). In 2014, not a single forest concession was granted (PFP and Forconsult, 2014). Whereas the many restrictions may have made sense from a conservation point of view (see Box 3), combined with unclear differentiations between reserved forests and plantations, and between state and private plantations, they might also have contributed to the continuation of established patterns of corruption. For example, there are examples of officials and decision-makers irregularly selling stumpage rights in government plantations.

In village areas, the irregular collection of royalties has also been observed, and cash-strapped local government authorities may also have been willing to accept some illegal logging to generate revenues (Mustalahti and Lund, 2009; Kajembe and Kessy, 2000; Luukkanen et al., 2006; Monela and Abdallah, 2010; SIDA, 2008; Kitabu, 2014; Milledge, 2010). Strictly speaking, the restrictions and the permit regime also applies to private plantations, including NIPF, but it is unclear how and to what extent they are enforced in practice.

The reform of Tanzania Forest Services was already envisaged in the 1998 Forest Policy, but was only implemented in 2010. It aimed at and seems to have provided for a somewhat more independent and efficient agency (Monela and Abdallah, 2010; URT, 2014; Purdon et al., 2015). However, the reformed TFS does not differ significantly from previous approaches to forestry, which tended to focus on control, conservation and the sustainable use of forest resources. TFS sees the management of the government’s forests, i.e. its eighteen plantations and the natural forest reserves, as its main task. Its Strategic Plan for 2015 describes ‘weak

legal frameworks for promotion of private and community based forest management' (URT 2014, p. 4), and in 2016 it was acknowledged that TFS officials' understanding of market demand and market standards is still limited (TFS, 2016). The agency's approach to entrepreneurial private-sector actors is still not clear apart from a stated preference for PPPs. Some PPPs do exist, but generally they have been perceived as vehicles to allow large private investors to help the government by providing extension services and improved seeds to communities rather than as a way of promoting business (World Bank, 1999; Makindara, 2013; Oy, 2012; Hurst, 2004, p. 199).

Extension services for non-industrial private forestry actors are largely provided for in donor-funded programmes. The Hifadhi ya Mazingira (Protect the Environment) Natural Resources Conservation and Management Programme in Tanzania (HIMA) began in the Southern Highlands in 1990, being supported by Denmark until its end in 2002, and it produced important lessons for the development of the sector. The programme became more successful when it shifted from a focus on conservation to more market-driven development by building on the tree-planting activities that farmers in the Southern Highlands were already carrying out for their own consumption (Aalbaek, 2001; Orbicon and Gilroy, 2007). In 2010-11 a REDD+ related project, entitled 'Private Forestry and Carbon Trading in Tanzania' (PFCTT), promoted small-scale tree-farming activities among farmers in the Southern Highlands. This work has been continued by the Private Forestry Programme (PFP), which, supported by Finland, aims to increase rural incomes in the Southern Highlands of Tanzania by developing sustainable plantation forestry. In 2013, the Gatsby Charitable Foundation established the Forestry Development Trust as an independent Tanzanian institution with a long-term vision for development of the commercial forestry sector (PFP, 2016). Though the Ministry of Natural Resources and Tourism is involved in both of these programmes, they are parallel structures and are characterised by a large degree of donor control.

Box 4 Large-scale foreign investments in forestry

A number of large forestry projects have taken off over the last 25 years, primarily involving foreign capital investment. Two different types of investment can be identified. The first is the establishment of traditional plantation forests from the early 1990s onwards, which have grown in numbers and acreage over the years. The first major project took off when the Commonwealth Development Corporation (CDC) received land as part of a debt relief deal and established a teak plantation, the Kilombero Valley Teak Company. The establishment of traditional plantation forest increased further with the Kyoto Protocol of 1997, which came into force in 2005 and formed the basis for the trade in carbon emission credits. Green Resources, a company of Norwegian origin, linked its operations to the scheme, starting with an application for large tracts of land near the government-owned Sao Hill Plantation in the Southern Highlands around 1997, and gradually expanding

elsewhere in the country (Purdon, 2012; Locher and Müller-Böker, 2014; Olwig et al., 2015). Green Resources also took over Sao Hill Industries, a sawmill, when it was privatized in 2003. Similarly, the Mufindi Paper Mill established a plantation when it was privatized around the same time. In 2006, the New Forest Company emerged in the Iringa area, also aimed at trading carbon credits through the CDM mechanism (Chachage and Baha, 2010).

The second type of investment was a number of more speculative biofuel projects poured into the country, attracted by high global oil and food prices from the mid-2000s onwards. These projects planted trees for their produce rather than for the value of their timber. However, they tended to be designed in a rather speculative rush by investors with no previous experience of plantation management in Africa's often challenging business environment and with no realistic business plans. Most went bankrupt before they really got started, leaving unfulfilled promises and dispossessed communities in their wake (Chachage and Baha, 2010; Kweka, 2012). The sudden rush caused worries that these investments might compete for land for food production and led to calls for a biofuel policy to guide investments (Mohamed et al., 2012; Sosovele, 2010; Habib-Mintz, 2010). Given the current low global oil prices, few projects that rely on biofuel production alone seem viable (Crooks, 2015; Branca et al., 2016).

Most projects have encountered problems with land, depending to varying degrees on their character. Due to Tanzania's labyrinthine land laws, which do not allow a village to sign a contract as a legal person, villagers found it hard to enforce the promises they were given by investors and authorities prior to transactions (Massay and Kassile, 2014; Locher and Müller-Böker, 2014). Furthermore, once the land had been transferred, it could not revert back to village control if the investor went bankrupt, as happened with most biofuel investments. Instead, it fell under state control (Pedersen et al., 2016; Jacob and Pedersen, 2016). However, the unclear land laws may also hit investors. Some plantations lost access to land, which they believed they had acquired through lengthy and complex land acquisition processes. For instance, the New Forest Company applied for around 30,000 hectares near Iringa in 2006 and had acquired 6,300 hectares by 2013 (Chachage and Baha, 2010; Locher and Müller-Böker, 2014; Locher, 2016). However, when I visited it in 2016, it controlled only 4,800 hectares, of which it had only managed to acquire title deeds for some parts. Generally, the larger plantations now struggle to acquire land and are increasingly entering into partnerships through different outgrower schemes instead.

CONCLUSION

The acute shortage of timber products that Tanzania will face in the near future can only be met by private tree growers, at least in the short to medium term. Whereas government plantations have been the major suppliers of raw material for industry, they are currently being overtaken by private forest plantations. Furthermore, it is worth citing recent statistics suggesting that production by small- and medium-scale actors or NIPFs will soon surpass that of the large-scale private plantations (Mwakalukwa, 2016). This is all the more surprising in light of the limited support that private forestry has received. The extension service programs that are currently targeting smallholders have limited geographical reach, and although the Ministry of Natural Resources and Tourism is involved, they are characterized by being parallel structures with a large degree of donor control. The latter also indicates that they are not a major government priority.

The lack of a vision for the development of the private sector was already acknowledged in the Forest Policy of 1998, but not much has changed since then in terms of state policies and institutions facilitating the sector. The process of formulating a new forest policy was initiated in 2007-8 mainly to address gaps in the regulations regarding revenue-sharing from participatory forest management (URT, 2007). The draft has undergone several revisions, the later versions reportedly paying greater heed to other private-sector issues, but it has not yet been released. In other words, the emergence of a vibrant private forest sector over the last couple of decades seems to have happened despite state forest policies and institutions rather than because of them. Why this lack of progress in promoting the place of the private sector in Tanzanian forestry? Through its review and analysis of literature on Tanzanian forestry, this paper points to the overall political economy of Tanzanian forestry as an important reason for the delay.

The paper also argues that a combination of path-dependency and vested interests among Tanzanian state authorities and actors has rendered more fundamental changes difficult. First, the official emphasis on conservation in forest policies and public forest institutions that has dominated the sector for much of Tanzania's history remains strong. The promotion of various forms of participatory forest management, which combine participatory management techniques with conservation objectives, has become the state's main mode of implementing private forestry in Tanzania. This has reinforced the tilt towards targeting policy interventions at 'villages' and 'communities', which carry strong positive connotations in the Tanzanian imaginary. Their interests are often seen as more dichotomous than those of other private-sector actors.

Secondly, it is worth noting that TFS and other government institutions are characterized by some degree of vested interests. Indeed, the current legal and institutional framework in Tanzania seems geared towards managing government plantations and reserved forests rather than facilitating private forest plantations and industries. At the moment, TFS does not harvest trees itself – it sells standing trees to private actors – because it does not have the infrastructure and capacity to process the timber, but there are plans to revitalize its capacity to process products.

This would be in line with what the reemergence of the state and state-owned enterprises has shown in other productive sectors (see, for instance, Jacob and Pedersen, 2016). Another factor is the interest in maintaining the status quo on the part of some corrupt officials and decision-makers who have benefitted from the existing regulatory regime.

Combined, these biases may also help explain why little attention has been paid to entrepreneurial villagers and small- and medium-scale investors during policy-making and implementation. Research into investments has also focused more on the larger foreign investors. The implications are several. In particular, our knowledge about NIPFs in Tanzania is limited, and more research is needed. One can assume that they may help lift people out of poverty in the Southern Highlands, where they are strongest. However, much depends on how their investments are implemented. If vulnerable groups are being squeezed out of their access to land, this may have significant effects in terms of both social differentiation and outright impoverishment, as has been observed elsewhere when the value of land increases. These risks also point to the importance of updating legal and institutional frameworks at all levels in a way that is not only more accommodating of NIPFs, but that also regulates land use and distribution more effectively.

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END NOTES

¹ This paper is an early product of the 'Timber rush: private forestry on village land' research programme, which has as its point of departure the empirical observation that a high demand for wood products in Tanzania has led to feverish activity in the forest sector in the Southern Highlands of Tanzania in recent years. Though a few large-scale foreign-owned plantations can be found, most of the people involved in tree-planting are domestic. From 2016 to 2020, the programme aims at researching these dynamics, identifying investors and describing their impact at the local level.

² Path dependency is a process during which institutions 'tend to persist over long periods of time and constrain the range of options available to actors in the future, including those that may be more efficient or effective in the long run' (Campbell, 2010).

³ For instance, President Magufuli recently stated that 'Privatisation was wrong' (Mbashiru, 2017).

⁴ In 1986, Ahlback estimated that 14% of Tanzania's land area was gazetted as forest reserves, that is, equivalent to the scale achieved in the early 1960s (Ahlback, 1986). It is unclear whether Benjamin and Bryceson find that the expansion of reserved forest includes PFM approaches or whether this is due to specific conservation interventions. Lund et al. (2016) conclude that PFM has not led to a large-scale green grab, thus implying that the latter is the case.