

## **EMPOWERMENT STUDY REPORT**

### **The Evaluation of Empowerment Policies, Strategies and Performance within the Agricultural Sector**

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#### **EXECUTIVE SUMMARY**

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## TABLE OF CONTENTS

<b>1.</b>	<b>EXECUTIVE SUMMARY AND RECOMMENDATIONS</b> .....	<b>3</b>
<b>1.1</b>	<b>TERMS OF REFERENCE AND MODUS OPERANDI</b> .....	<b>3</b>
<b>1.2</b>	<b>BEE IN THE AGRICULTURAL SECTOR</b> .....	<b>4</b>
<b>1.3</b>	<b>THE MANY FACES OF BEE IN AGRICULTURAL PRODUCTION</b> .....	<b>4</b>
<b>1.4</b>	<b>WHAT IS EQUITY AND PARTICIPATION?</b> .....	<b>5</b>
<b>1.4.1</b>	<i>Recommendations</i> .....	<b>5</b>
<b>1.5</b>	<b>HOUSEHOLD FOOD SAFETY NETS<sup>7</sup></b> .....	<b>5</b>
<b>1.5.1</b>	<i>Recommendations</i> .....	<b>6</b>
<b>1.6</b>	<b>EQUITY SCHEMES AND PARTNERSHIPS</b> .....	<b>7</b>
<b>1.6.1</b>	<i>Recommendations</i> .....	<b>7</b>
<b>1.7</b>	<b>COMMERCIAL FARMING (ONE MAN ONE FARM)</b> .....	<b>8</b>
<b>1.7.1</b>	<i>Recommendations</i> .....	<b>9</b>
<b>1.8</b>	<b>COMMUNAL LAND USE</b> .....	<b>10</b>
<b>1.8.1</b>	<i>Recommendations</i> .....	<b>10</b>
<b>1.9</b>	<b>STATE LAND</b> .....	<b>11</b>
<b>1.9.1</b>	<i>Recommendations</i> .....	<b>11</b>
<b>1.10</b>	<b>A SHARED VISION FOR LAND REFORM</b> .....	<b>12</b>
<b>1.10.1</b>	<i>Recommendations</i> .....	<b>12</b>
<b>1.11</b>	<b>COOPERATION BETWEEN ROLE-PLAYERS</b> .....	<b>13</b>
<b>1.11.1</b>	<i>Recommendations</i> .....	<b>13</b>
<b>1.12</b>	<b>MONITORING AND EVALUATION</b> .....	<b>13</b>
<b>1.12.1</b>	<i>Recommendations</i> .....	<b>14</b>
<b>1.13</b>	<b>THE THRUST OF THE PROVINCIAL EMPOWERMENT PROGRAMMES</b> .....	<b>14</b>
<b>1.14</b>	<b>COMMENTS BY STAKEHOLDERS</b> .....	<b>17</b>
<b>1.15</b>	<b>CASE STUDIES</b> .....	<b>17</b>
<b>1.16</b>	<b>REPORT ON MAJOR INSTITUTIONS (NATIONAL ENTITIES)</b> .....	<b>18</b>

## **EXECUTIVE SUMMARY AND RECOMMENDATIONS**

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### **1.1 Terms of reference and modus operandi**

Informed by its vision of “*A United and Prosperous Agricultural Sector*” the National Department of Agriculture commissioned this study to (i) assess the extent to which “The Strategic Plan For South African Agriculture” is being realized with regard to the core strategies namely: equitable access and participation; global competitiveness and profitability, and sustainable resource management (ii) identify the role players and determine their roles and interactions, (iii) undertake an audit of empowerment initiatives in the four sub-sectors (field crops, horticulture, animal products, and industrial products) in each of the nine provinces; analyze the policies and strategies followed, and document lessons learned, and (iv) develop a monitoring and evaluation system.

The outcome of this study could determine future strategies to increase effectiveness and efficiency of empowerment initiatives within the agricultural sector of South Africa.

Findings of the evaluation were informed by an extensive desk study and structured interviews solicited from the nine Provincial Departments of Agriculture, national entities, the industry and various other role players. In addition, a number of empowerment projects were summarized and analysed in each province. There is a common desire by Provincial Departments of Agriculture, Regional Land Reform Offices, farmer organizations, commodity organizations, private sector companies, NGOs and black and white farmers, to achieve equity and participation in the agricultural sector, and make the Strategic Plan for South African Agriculture work.

Some of the key findings are listed below. The numbers in brackets provide a quick reference to sections of the reports where the particular issue is discussed in greater detail<sup>1</sup>.

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<sup>1</sup> When the number is preceded by the provincial reference, it refers to that specific provincial report. Otherwise it refers to this integrated report.

## **1.2 BEE in the agricultural sector**

Black Economic Empowerment (BEE) in the agricultural sector must occur at three levels: agricultural production, agribusiness, and agricultural institutions. This report focuses primarily on agricultural production, since by the nature of the training and experience of their staff; this is the main domain and focus of the Provincial Departments of Agriculture. However, some reference is made to agribusiness and institutions. Chapter 6 provides an analysis of the findings, supported by conclusions and recommendations.

## **1.3 The many faces of BEE in agricultural production**

Broadly speaking agricultural production systems (land use) can be categorized as: household food safety net projects; communal land use; share equity schemes; outgrower schemes; partnerships; purchasing of a farm for multiple ownership; and purchasing of a farm for occupation and operation by a single owner. In all provinces the major effort has gone into household food safety net projects. In communal areas the focus has been on enhancing the use of the common agricultural resource base through infrastructure development, financing schemes and extension. White owned farms suited to extensive or semi-extensive management, tend to be transferred as a unit to groups of beneficiaries. White owned farms under intensive, high-tech management tend to be transferred via equity share schemes, out-grower schemes and partnerships. Land transfer according to the ‘one-man, one-farm’ model, i.e. the model prevalent in the white commercial farming sector, is currently occurring on a non-significant scale.

The Land Redistribution for Agricultural Development (LRAD) Programme is the major instrument used by government to achieve equity and participation. It is specifically aimed at giving black farmers access to land for subsistence or productive purposes and is jointly administered by the Regional Land Reform Offices of the Department of Land Affairs and the Provincial Departments of Agriculture. It replaced the earlier Settlement on Agricultural Land Grants. The Land Bank administers LRAD grants on behalf of the Department of Land Affairs, based on available funding from DLA (28).

## 1.4 What is equity and participation?

Equity and participation raises the question: “When do you have equity and what do you participate in”. Participating in both farming and some form of agribusiness require essentially the same elements to be present, namely you need to know what to do (knowledge) and be able to do it (skills); have access to land (or an agribusiness); have the money to purchase the land and production inputs (access to finance); have access to production inputs (farming requisites, mechanization, transport, tradable or raw materials in the case of agribusiness, etc); be able to market the produce (access to markets); and have a “voice” in determining policy issues that affect your enterprise (lobbying). ***If the vision of a united and prosperous agricultural sector is to be achieved, equity and participation must be achieved with regard to all six components.*** These needs, though common to all categories, require different ways of delivery for different types of empowerment projects.

### 1.4.1 Recommendations

*The different types of empowerment initiatives (land use systems) referred to in paragraph 1.3, and the needs listed in paragraph 1.4, forms a matrix relating type of project to needs. Two recommendations flow from this relationship:*

- a. *Any empowerment business plan should always indicate exactly how each of the needs would be provided for.*
- b. *Ideally each role-player should focus its strategy and customize its operations for the particular cells in the matrix for which it has the necessary resources and expertise. Table 4 on page 112 of this report suggests a ‘division of labour’ for different role-players.*

## 1.5 Household food safety nets

The majority of the empowerment projects are small in scope. Provincial Land Reform Office projects in 2001/2002 benefited 83 530 people on 365 993 hectares, i.e. 4.4 hectare per beneficiary. However, changing people’s lives at the micro level (the majority of the current provincial land reform projects) has had a huge impact on the quality of life of a significant number of people (and mitigated significantly against land invasions). In addition to the LRAD projects, and the infrastructure projects to improve agricultural

production on communal land, the Land Bank’s Step Up micro loans, intended for people who want to improve their production of vegetables, poultry, pigs, or other agricultural activities loaned more than R 7 million in its first year to more than 14 000 Step Up clients. This product is proving that 'high-risk' clients have the ability and willingness to repay loans, while providing an important opportunity for people at the bottom end of the market to build a financial track record and progress towards more formal loan products (Annex 2 on page 129).

Perusal of the various provincial reports clearly illustrates the over-riding importance of ‘human behaviour’ and ‘human capacity’ i.e. social dynamics, as opposed to finance and physical assets, for the successful implementation of empowerment projects. This applies to all types of projects, but is especially relevant for group projects (see FS 40-44). Conflict is a recurrent theme in progress reports. Very few reports are positive about the project. However, experience in Asia and Latin America show that group projects can be very successful, provided the groups are relatively small, cohesive and control the process<sup>2</sup>.

#### *1.5.1 Recommendations*

- a. The current focus on household food safety nets is warranted in the context of the overriding need for poverty alleviation in SA.*
- b. The critical success factors for these kind of group projects are a realistic group size relative to expected benefits; group cohesiveness; clarity in every participant’s mind about objectives, rights and obligations; a member of the group championing the cause; a capable external facilitator acting as a resource person and link to external resources; and making sure that the business plan address all the items of recommendation 1.4.1*
- c. In addition to quantitative record keeping, each project should chronicle its process experiences so that funders can learn from them.*

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<sup>2</sup> *International Experiences of Rural Development*. Norman Uphoff, 2001. In: Contributions towards the Knowledge of Rural Development. Proceedings of the conceptualisation workshop on the integrated rural development programme of the WK Kellogg Foundation. Postgraduate School for Agriculture and Rural Development, University of Pretoria.

- d. Consideration should be given to also involve social scientists as facilitators instead of only agricultural extension officers. Government officials who have to assist and sometimes even lead community projects, need specialised training to give them an adequate understanding of essential concepts, such as commercialisation, coordination, beneficiaries, the mainstream economy and gender issues.*
- e. A clear difference should be made between poverty relief and empowerment in the agricultural sector. Household food safety nets may be a stepping stone for participation and equity in the sector for some participants, but should be budgeted for as poverty alleviation.*
- f. Visioning exercises are extremely useful tools to resolve potential conflict within groups before it even occurs.*

## **1.6 Equity schemes and partnerships**

There is a mistrust of equity schemes in many quarters. Part of this is related to a mistrust of commercial farmers, but part is also due to the difficulties of setting it up. The legalities are complicated, so that rights and obligations need to be clearly elaborated in the contractual agreement. On the other hand, the advantages of equity share schemes is that it is a cost-effective way to enter capital intensive, high tech, high risk enterprises; at a lower risk than outright purchase. It is also a good training ground for prospective new farmers who want to follow this route. The critical success factors are: a high level of trust; a change in management style; a real sense of ownership by the beneficiaries; short-term benefits to the beneficiaries; and that the project is economically viable. The bottom line is: the objective must be to create wealth for equity partners. In principle the same factors that ensure the success of equity schemes also apply to partnerships.

### *1.6.1 Recommendations*

- a. Equity schemes and partnerships should receive priority as a fast track mechanism to bridge the gap between market value and productive value of agricultural land (especially high potential, capital intensive, high tech enterprises) and as a mechanism for skills transfer.*

- b. Commission case studies of existing equity schemes and use this information to compile guidelines on how to set up an equity scheme or partnership, especially with regard to the legal contract and how to manage the enterprise.*
- c. Any equity scheme should budget for at least some cash return on investment for LRAD beneficiaries within the first year of operation.*
- d. Teaching equity partners life skills, and making them feel at home and comfortable in the agricultural fraternity, is as important as teaching them technical and managerial skills. Farm workers have to make a quantum leap from having technical skills to becoming managers and decision makers. Understanding the value chain, and social development, is as important as other skills development.*
- e. Commission an analytical study of the current LRAD project cycle, to clearly identify the different essential inputs required at each stage of the cycle.*

## **1.7 Commercial Farming (One man one farm)**

The ideal of a “*Prosperous and United Agricultural Sector*” and the target of 30% agricultural land transferred by 2015 implies that driving through any farming area, approximately every third farm should be black owned. Given that about 4% of agricultural land comes on to the market annually, in theory the policy of “willing seller and willing buyer” could achieve this target. However, this is unlikely to happen, because:

- (i) The target is way beyond the current budget of about R 500 million for land reform. For example, in the Western Cape a 30% transfer means that 266 000 hectares of agricultural land per annum must be transferred over 15 years. At R 5 700 per hectare this would require a capital budget of R1.5 billion per annum for this province alone, and
- (ii) Although no exact data is available, observation and enquiries in the white commercial farming sector indicate that for all practical purposes prospective new full-time farmers (without prior farming connections) do not follow the route of borrowing money and buying a farm. The gap between “market value” and “productive value” of land, and the cost of capital is simply prohibitive. The usual route is via renting a farm or working on a farm, with a view to eventually buy a farm.

### 1.7.1 Recommendations

- a. *Make the settlement of black commercial farmers on individual farms, i.e. one man one farm, a policy priority.*
- b. *If the policy of “willing seller, willing buyer” is to succeed, creative thinking from government, lending institutions, and organized agriculture is required on how to bridge the gap between “market value” and “productive value” of land, as well as the time lag (learning curve) between settling a new farmer and the time when the farm will again be producing at pre-transfer levels.*
- c. *One possibility is to introduce a model whereby state land is made available to prospective farmers on a sliding scale of rent, starting with a nominal rent in year one and increasing the rent annually with an option to buy at the end of the rental period (similar to the Vaalharts scheme).*
- d. *Another lesson from earlier schemes is to start with relatively small units. Over time the successful farmers bought out the less successful ones until equilibrium was reached with regard to farm size. Low entry and exit barriers characterized the schemes.*
- e. *Another possibility is to use state funds to lever land transactions. Design funding packages combining various sources, e.g. the farmer who sells the farm (i.e. through tax incentives and guarantees), Land Bank, Commercial banks, donor funding.*
- f. *Include (selectively) commercial farmers on committees that assess the price asked by the seller and the business plan of the buyer (something like the former Agricultural Credit Board assessors).*
- g. *Farmer organizations could pro-actively identify willing sellers, whilst the Provincial Department of Agriculture could advertise for, identify and screen willing buyers.*
- h. *Building the knowledge and skills base should be done through farmer-to-farmer extension,<sup>3</sup> and by commodity organizations and agribusinesses.*

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<sup>3</sup> With few exceptions, the need for **mentorship** is acknowledged, provided it is done in a non-paternalistic way and according to mutually agreed upon conditions. One suggestion was to recreate something along the lines of the old Soil Conservation Committees, where farmers were getting best practice advice from each other. This was essentially a “farmer-to-farmer” model of extension, a model which has become very successful in many developing countries in Latin America and Asia. The proposed committees should be non-racial.

- i. *A solution needs to be found to the earlier R15 000-00 per household land reform beneficiaries. Many of these groups are dysfunctional as members have left and there is no one actively assisting the groups to resolve their problems. A follow-up study on the current status of these projects, the causal factors, and possible future action, is required.*

## **1.8 Communal land use**

Provincial departments of agriculture in the Eastern Cape, Limpopo, Kwazulu-Natal and North-West spend a major part of their budget and manpower on promoting agricultural production in the communal areas, primarily through infrastructure development, market development, extension, small loans, bull and ram schemes, and mechanization services. However, there is some new thinking about land use in the communal sector, since large parts of this land has a high potential for agricultural production (e.g. 38% of the national beef herd is owned by the communal sector) which for various reasons it is not realizing. (e.g. continuous shallow ploughing of the same land by limited resource farmers has resulted in an impermeable layer, limiting rain fed grain production in many areas; large areas of arable land is not utilized for lack of labour, inputs or mechanization). In Limpopo there are a number of initiatives to establish partnerships between commercial farmers and local communities, especially in the high potential tropical fruit growing areas. More than one senior official in other provincial departments expressed doubts about the concept of ‘community’ as a mechanism for development. They maintain that community based models of agricultural development have become dysfunctional because of internal conflicts of interest. Other opinions expressed was that the traditional system should be adapted to support individual households to establish and maintain home gardens, whilst restricting access to grazing and arable land to prospective farmers within the community. Given the extent of communal land (table 1, page 29) and its productive potential, this is a debate that will further unfold in the future.

### **1.8.1 Recommendations**

- a. *Create as many opportunities as possible to stimulate open debate on communal land use and the opportunities created by the new Communal Land Rights Bill. Commission case studies on the best use of communal land, collating information on*

*the initiatives, and the outcomes, of programmes to increase agricultural production on communal lands in the different provinces.*

- b. *Commission case studies of communal irrigation schemes. Many irrigation schemes were created in the past. According to the FAO small-scale irrigation is one of the most important avenues for increasing food security on the continent. A thorough situation analysis (sourcing information predominantly from the original beneficiaries) is highly desirable. This should be augmented by a literature study of irrigation schemes in other developing countries (e.g. the Gal Oya scheme in Sri Lanka).*
- c. *Maintain and enhance current support programmes.*

## **1.9 State land**

One-fifth (20%), i.e. 24 919 290 hectare of South Africa is **state land**. A large part is for use other than agriculture. The distribution of the approximately 15 million hectare state land potentially available for empowerment in the agricultural sector is shown in table 1 on page 29. The disposal of state land that was acquired by Government during the 1970's and early 1980's for the consolidation of the Bantustans, is highly contested and requires careful and patient interaction with local role-players, especially local farmers associations. Where lessees have left they often left sub-lessees in their place. Where they abandoned the farms they abandoned them to farm-workers and their families who had in many cases been on the farms since long before the lessees. In other cases adjacent communal areas were quick to stake their claims to additional grazing land, sometimes on the basis of historic claims to the land and/or on the basis of the promises of various Bantustan politicians. Nevertheless, much land has been transferred, and the process is being accelerated.

### *1.9.1 Recommendations*

- a. *Use state land as a fast-track mechanism for establishing commercial black farmers (entrepreneurs).*
- b. *Institute procedures to ensure cooperation between regional land reform offices and provincial departments of agriculture (currently very weak in some provinces).*

## **1.10 A shared vision for land reform**

A lot of debate is still needed on the implementation and outcome of land reform. Some statements made by senior government officials are that: (i) the success of the programme should be measured in terms of benefits transferred, rather than head counts and land areas transferred, (ii) real agricultural empowerment should not be confused with poverty relief, the latter focusing more on home gardens and urban agriculture in all its manifestations (iii) subdivision of commercial farms with one farming household per farm, is far more likely to create a prosperous black farmer class than multiple ownership, therefore financing schemes should be redesigned to promote the establishment of these farmers, making realistic provision for fixed investment and operational capital on economically viable farming units (iv) agribusiness projects (as opposed to primary production) provide a highly cost-effective and fast-track mechanism for black empowerment (v) there are too many non-agriculturalists practicing opportunistic agriculture on communal land, cluttering up the resources and preventing real agriculturalists to be productive (vi) emulating the system of ‘multiple ownership’ on transferred commercial farms or state land, is therefore self-defeating in terms of the objective of a prosperous and competitive agricultural sector, (vii) development that will create financial rewards for beneficiaries requires a paradigm shift towards supporting entrepreneurs, focusing on individual empowerment that will lead to an emergent black commercial farming class in society.

### *1.10.1 Recommendations*

- a. Make a clear distinction between poverty relief and BEE in the agricultural sector. Design a set of policies and funding principles that apply to poverty relief (primarily urban agriculture and support to communal farming) and a separate policy and funding principles for achieving the goal of a 30% land transfer by 2015.*
- b. Design a specific policy to promote BEE in agribusiness since it can be cost-effective, yield quick results, and draw upon BEE experience in other sectors of the economy (e.g. banking or mining).*
- c. Promote an awareness of the need for BEE in agricultural organisations and institutions. Put in on the agenda.*

## **1.11 Cooperation between role-players**

Lack of cooperation between government departments and with other stakeholders is a prominent and recurrent theme in all the provincial reports. Co-operation becomes very difficult if the cooperating partners have different visions of what is to be achieved. Without a shared vision and an understanding of the support system required for the different categories of land users, there are no mutually agreed upon operational guidelines, which in turn leads to distrust, no clear definition of roles, a lot of finger pointing, political interference, and poor project design.

### *1.11.1 Recommendations*

- a. *The most important condition for accelerating the process of empowerment is to heighten the “social energy” of the role players, in other words to stimulate the ideas, ideals, and friendship relationships among them.*
- b. *Cognisance should be taken of the opinions expressed (see annex 4) when formulating policy. Putting the issues on the table and discussing them openly is part of the concept of generating the “ideas” and “ideals” that provides the social energy for development.*
- c. *Beware of the greatest constraint to cooperation, namely the “not invented here” syndrome, i.e. a need to be in control of everything, mistrusting other organizations involved in the work and professional jealousy. Get as many stakeholders as possible involved: institutions in the government, NGOs, CBOs, academics and the private sector. In the majority of successful programmes, there is a strong presence of partnerships; addressing technologies for increased productivity, providing systems for effective management, coordination and implementation, and facilitating market linkages.*

## **1.12 Monitoring and evaluation**

The development of a monitoring system is much more than the establishment and measurement of overall key performance indicators. It is now recognized all over the world, and especially in developing country environments, that the usefulness of such a system to primary stakeholders is of the utmost importance.

### 1.12.1 Recommendations

- a. *Clearly defined national strategies (see 1.11.1) for the implementation of empowerment initiatives are required, in order to establish a monitoring system based on a strategy framework that guides the Provincial Departments in their empowerment efforts.*
- b. *The NDA will have to decide whether it needs to guide the Provincial Departments to a greater extent in their empowerment implementation efforts. It is clear that initiatives in a number of the provinces face a number of problems.*

### **1.13 The thrust of the provincial empowerment programmes**

The Provincial Departments of Agriculture have different structures, priorities and strategies, depending on the needs in the particular province. However, they all share three primary responsibilities, namely: they implement the LandCare Programme, which is a community-based and government-supported approach to the sustainable management and use of agricultural natural resources; they are responsible for implementing LRAD in cooperation with the Regional Land Reform Office, especially farmer support; and they provide key infrastructure and farmer support to communal farmers. Broadly speaking:

***Gauteng Province*** focuses on household food security projects (Gauteng appendix 1, page 34-51) and farmer settlement. Altogether 3419 people participate in 161 vegetable gardens, 6 poultry projects and 3 permaculture projects. The Province has 320 196 hectares of State land, of which 8 108 ha have been allocated. Appendix 2 of the provincial report lists 255 farmers participating in the Farmer Settlement Programme.

***Eastern Cape Province*** focuses on the transfer of state land (250 000 ha in 1994) and the enhancement of communal production (on 5,5 million ha). A significant aspect of the transfer of state land has been the relatively large number of transfers according to what may be called “traditional commercial farming dogma”, namely “one man one farm”. Of the original 250 000 ha approximately 50 000 is not available for farmer settlement, because of claims by communal communities. It is expected that the state land disposal process should be completed to a large extent by the end of the 2003/4 year (EC 12-22). To increase production in the communal areas, a number of schemes have been initiated,

e.g. the Resource Planning Scheme; Rural Finance Scheme; a scheme to distribute improved bulls and rams; a Crop Production Scheme; Rural Mechanization Scheme; and a Public Private Partnership (including the National Wool Growers Association) that increased 137 communities' income from wool from R 3 million to R15 million (EC 38-45).

In *Limpopo Province* there are two initiatives to redistribute land to previously disadvantaged farmers, namely LRAD and the Restructuring of State assets. Currently, 23 000 ha of land has been distributed through LRAD and 60% of that land was distributed to women. The PDA have leased out 196 000 ha of state land to farmers. Ninety eight percent of the total leased land was leased to black farmers. The Limpopo provincial report is particularly strong on lessons learned from the various initiatives (Limpopo 5 - 16).

In the *Free State* the major initiative is the Community Projects Fund Support Programme (CPF-SP), a fund established for empowerment projects in the Province by the European Union in collaboration with the Department. The provincial report summarizes 50 projects under the auspices of the CPF-SP, ranging from community poultry, piggery and dairy production; a bull improvement scheme; 50 households buying a small farm; vegetable production; wool production; community kraals; mixed farming by groups on hired or purchased land; to infrastructure development on the town commonage (FS 18-34). A multimillion rand project in Bethlehem in the Free State has seen the delivery of 600 tons of apples to Europe and the Far East in 2002 (FS 34). The Industrial Development Corporation (IDC) and the Development Bank of southern Africa (DBSA) each allocated R7.2 million to the project. The scheme consists of approximately 100 ha land that was allocated to emerging farmers several years ago. New apple cultivars were planted in a climate ideal for this purpose. There are now 106 participants.

*North West* focuses strongly on Public Private Partnerships, especially the Mt Nebo Project, which aims to transform subsistence farming to semi commercial farming units. Appendix 1 in the provincial report lists 93 different projects, with 1005 participants. Relevant observations and analysis of these projects are presented in the report (NW 16 – 19).

The *Mpumalanga* Provincial Department of Agriculture, Nature Conservation and Environment has adopted empowerment initiatives that are more focussed towards management and care of the environment. Financial resources are limiting the implementation of some good initiatives to balance the need to care for the environment and access to land and other resources for agricultural production. The quest for adaptive research seems not to be aligned with the broad definition of economic empowerment but limited to job creation at the farm service workers level. There is a need to put some effort in the agricultural section to rethink their policy on empowerment and develop strategies to implement the policy (Mpumalanga 16). The case study further elucidates these issues (Mpumalanga 35).

The *Western Cape* PDA focus on infrastructure and extension support to urban agriculture and the 12 former Coloured Rural Areas (that cover a total area of 630 km<sup>2</sup> and with a population of approximately 43 000 people). In essence, these areas have a communal land tenure system. Deciduous fruit and grapes are extremely capital intensive enterprises; very high-tech; land prices for this type of farming can be as high as half a million rand per hectare; and from planting to harvesting can take many years. Participation and equity therefore tend to occur through partnerships between successful farmers and HDIs. This creates the opportunity for mentorship through participation rather than involving the financial risk of the outright purchase of a farm. The general trend is to create equity share schemes that vertically integrate primary production, processing, packaging and marketing. This is evident in the example of the Cape Olive Trust Case Study (WC 48 – 53).

In the *Northern Cape* the Orange river is an obvious mechanism for BEE. The Orange River Farmer Settlement Programme (ORFSP) aim to establish emerging commercial farmers along the banks of the Orange River. The Department of Water Affairs and Forestry allocated water rights for 4 000 ha for this project in 1999. More than 130 farmers have been settled on plots (typically 10 to 12 hectare) producing raisins, cotton and other cash crops. Other projects include rooibos tea, hydroponic production of vegetables, flower bulb production, cultivar evaluation by small-scale farmers, livestock improvement and marketing. A major equity share scheme initiative involves

collaboration between the PDA, Industrial Development Corporation (IDC) and Karsten Farms to assist 300 farmer workers to become shareholders in a table grape export company (reportedly with the largest packing house in the world). It is planned to expand this venture to eventually give shares to almost 1200 farm workers (NC 22).

In *KwaZulu-Natal* empowerment projects range from community gardens, irrigation schemes, and hydroponic vegetables, various livestock projects, orchards, marketing facilities, and home industries (KZN 10 – 13). At present, about 27 000 households are participating in these projects, benefiting more than 250 000 people. Over a 3-year period, R142 million will be utilized for this programme. Approximately 80 000 hectares of state land could be made available for the settlement of emerging commercial farmers. The PDA has developed a preliminary business plan for farmer settlement. The remainder of the land is settled under a communal system. However, the potential for the development of up to 25 000 hectares under irrigation exists in the Makhatini flats.

#### **1.14 Comments by stakeholders**

Some very useful viewpoints and perceptions were expressed during the study. Since these could serve as strategic pointers for enhancing the drive towards a unified and prosperous agricultural sector, and may form the basis for further investigation, the observations are attached as annex 4.

#### **1.15 Case studies**

The following brief case studies are reported:

Gauteng: The Middledrift Bee Project (Gauteng 32)

Limpopo: Venda Mango Growers, Limpopo Province (Limpopo 24)

Eastern Cape: Golden Fleece of the Eastern Cape (EC 38)

Northern Cape: Keboes Fruit Farms, Paprika Factory in Springbok (NC 19)

Western Cape: Cape Olive Trust (WC 48)

Free State: Apple Project, Bethlehem (FS 34)

KwaZulu-Natal: Mandlenkosi Piggery Project (KZN 22)

North West: Beef Profit Partnership Programme (NW 23)

Mpumalanga: Legolaneng Piggery Project (Mpumalanga 35)

### 1.16 Report on major institutions (National Entities)

There is a separate report discussing the roles of a number of national entities that support BBE at national and/ or provincial level. These institutions include, among others, the following:

<ul style="list-style-type: none"> <li>• Agri-SA</li> </ul>	<ul style="list-style-type: none"> <li>• National Agriculture Marketing Council - NAMC</li> </ul>
<ul style="list-style-type: none"> <li>• National African Farmers' Union - NAFU</li> </ul>	<ul style="list-style-type: none"> <li>• Land and Agricultural Bank</li> </ul>
<ul style="list-style-type: none"> <li>• Agriculture Research Council – ARC</li> </ul>	<ul style="list-style-type: none"> <li>• Department of Land Affairs Department - DLA</li> </ul>
<ul style="list-style-type: none"> <li>• Milk Producers Organisation - MPO</li> </ul>	<ul style="list-style-type: none"> <li>• Sugar Association of South Africa – SASA.</li> </ul>
<ul style="list-style-type: none"> <li>• Agriculture Business Chamber - ABC</li> </ul>	<ul style="list-style-type: none"> <li>• National Emerging Red Meat Producers' Organization - NERPO</li> </ul>

