

# **TRUEQUE AMAZÓNICO**

## Lessons in Community-based Ecotourism



*Participants:*

**CHALALAN ECOLODGE, BOLIVIA  
KAPAWI ECOLODGE, ECUADOR  
POSADA AMAZONAS, PERU**

with  
**Amanda Stronza**

**Critical Ecosystem Partnership Fund**

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## **PREFACE: Three Communities, Three Lodges, and One Alliance**

In 2003, leaders from three Amazonian regions in Ecuador, Peru, and Bolivia came together to share experiences and lessons learned in ecotourism. The name of the initiative was Trueque Amazonico, and the goal was to learn about community-based ecotourism from experts in the field. The learning came from former hunters who now lead tourists as birding and wildlife guides, from small farmers and artisans who now sell handicrafts to tourists, from fishermen who know the rivers and now supplement their incomes by driving tour boats, from local leaders who know their communities so well and now assume management of their own tour companies, and from many others who have forged new paths in ecotourism and now have so much to teach us.

The ecotourism experts who gathered for the Trueque Amazonico came from some of the most remote regions of the Tropical Andes to share their experiences, knowledge, ideas, and concerns with each other and with other people in the region who are striving to make ecotourism an effective tool for conservation and development. They are the experts who work from their communal meeting houses, their forests, farms, and thatched homes, and their two-computer offices in the dusty frontier towns of Puyo, Ecuador, Puerto Maldonado, Peru, and Rurrenabaque, Bolivia. They are representatives of local traditions and native territories among the Achuar in Ecuador, the Quechua-Tacana of Bolivia, and the Ese'ija and riberenos of Peru. They are innovators who have collaborated with entrepreneurs, tour operators, environmentalists, donors, development banks, biologists, and social scientists to make ecotourism work for an array of interconnected goals and visions for their communities and families. Using ecotourism as a tool, they strive for the biggest goals in community development, self-determination, and biodiversity conservation.

Before the Trueque, the experts had never met, though they were having similar dreams and also facing similar challenges. The Trueque brought them together for the first time in a series of three five-day workshops that took place on location, in each of their respective ecolodges, Posada Amazonas in Peru, Chalalan in Bolivia, and Kapawi in Ecuador. Participants included community leaders and their partners in the private tourism industry and non-profit conservation. When they gathered to compare notes, many things began happening on various levels. As flipcharts were filled, discussions bridged rivers and regions, and ideas spanned perspectives, backgrounds, and disciplines. Participants learned directly from each other, but they also began generating new ideas and building new alliances. They reached consensus on various points related to how to divide benefits from tourism, how to manage resources for tourism, and how to plan wisely for tourism in their communities.

The process itself became a lesson. Throughout the workshops, participants often sat back in quiet surprise as it became apparent just how much they had to share, the extent to which they knew what they knew, and how far they had come, metaphorically and otherwise. So many times they laughed and nodded with recognition while listening to stories of how people had managed conflict, overcome disastrous first tries, and dealt with disappointing failures—just as they themselves had. The conversations buzzed throughout the meeting, but never let up, even at mealtimes, on the boats, walking the trails, and waiting in airports. There simply were endless

stories and ideas to share, questions to ask, and points to compare. As they talked during three workshops, over the course of three months in three countries, the trust grew, the dialogue became more pointed, the probing and critique of each other more forthright, and the learning deeper.

The learning and comparison took place not just in the workshops, but also in preparation for the workshops. Coordinators and community leaders from the three countries worked in close collaboration to develop the themes, methodologies, and activities for each workshop. The process for building the Trueque mirrored the participatory nature of each of the lodges. Community leaders participated in the Trueque, and community leaders planned the Trueque.

***Reflections from the Trueque***

*"The Trueque was an opportunity to talk frankly, to be totally transparent, and to share the good with the bad" (AR, 6/16)*

The purpose of this document is to capture the process that was followed and share the lessons learned. It is divided into three sections and eight chapters. Section I covers the rationale behind the Trueque Amazonico, the participants, and the methodology. It includes a set of recommendations for future exchanges between communities, either to discuss ecotourism or other grassroots efforts. Section II summarizes in seven sections the themes of discussion among the Trueque participants in the workshops. It is accompanied by comparative, descriptive analysis of ecotourism in the three sites, gathered through ethnography. Section III provides a summary of lessons learned and consensus reached on strategies and tools for linking ecotourism with conservation and community development.



*Trueque participants travel to workshop in Chalalan*

## CHAPTER 1: The Project: Trueque Amazonico

### 1.1 Community-based Ecotourism, Conservation, and Sustainable Development

The year 2002 was designated the "International Year of Ecotourism" by the United Nations (UN) and the World Tourism Organization (WTO). Throughout the year, conservationists joined with tour operators, local organizations, policy makers, academics, and other stakeholders to reflect on the successes and failures of ecotourism over the past few decades, and to take collective stock of the lessons learned. Two themes of particular interest were: 1) linking ecotourism more effectively with conservation, and 2) incorporating local peoples more actively and meaningfully in the design, management, and evaluation of ecotourism.

The project, "Learning Host to Host: Ecotourism Exchanges in the Tropical Andes" (or "Trueque Amazonico"), was funded by the Critical Ecosystem Partnership Fund to explore several key questions about ecotourism and conservation, such as: How are economic, social, and environmental benefits from ecotourism apportioned to local communities? What is the effect of increased local participation in ecotourism? What are the comparative advantages of different partnership approaches to community-based ecotourism? What are the obstacles to making ecotourism effective as a conservation strategy, and what are the opportunities?

Three pioneering community-based ecotourism projects in the biodiverse region of the Vilcabamba-Amboró Corridor in the Tropical Andes share a depth of insight on these questions. In fact, the combined experiences of Chalalan Ecolodge in Bolivia, Kapawi Ecolodge in Ecuador, and Posada Amazonas in Peru provide an expansive range of lessons learned. Each project has had relative success in combining tourism development with conservation and concern for local livelihoods. Yet each was built on a different "partnership" approach to community involvement and empowerment.

The "Trueque Amazonico" brought together the leaders from Chalalan, Kapawi, and Posada Amazonas, along with members of participating Achuar, Ese'ejá, mestizo, and Quechua-Tacana communities, to share what they have learned with each other. Between March and May 2003, six to eight participants from each lodge visited each others' projects, exchanged insights, and ultimately compile a series of "lessons learned" for other organizations, private companies, and local communities involved in ecotourism. In the process, participants were able to draw greater attention to the successes of their ecotourism operations (thus improving their potential viability in the tourism market), and strengthen their alliance in the relatively small but expanding niche of community-based ecotourism.

#### ***Reflections from the Trueque***

*"The point of the Trueque was to meet people, exchange experiences, and most importantly, make new friends with those who share the same perspectives and concerns in achieving ecotourism" (BP, 6/17).*

## 1.2 Comparing Ecotourism Partnerships

All three projects featured in the Trueque—Kapawi, Chalalan, and Posada Amazonas—represent community-based and participatory approaches to ecotourism. In each of the cases, local residents are earning economic benefits from tourism, but they are also playing a significant role in making decisions about the direction and future of ecotourism in their own communities. Locals in each of these projects understand best and first-hand the specific kinds of costs and benefits ecotourism can bring.

Each project in the Trueque also represents some kind of “ecotourism partnership,” either between a community and a private tour company, or between a community and a nongovernmental organization (NGO). San Jose de Uchupiamonas in Bolivia partnered with the international NGO, Conservation International, to create Chalalan. The Achuar indigenous federation in Ecuador, FINAE, partnered with the tour company, Canodros, to create Kapawi. And the Native Community of Infierno in Peru partnered with the tour company, Rainforest Expeditions, to create Posada Amazonas.



*Kapawi delegates at first workshop*

Though each project has generated an enormous amount of attention and appraisal from outside conservationists, ecotourism specialists, and researchers, prior to the Trueque they had not been assessed in any systematic and comparable fashion by locals themselves. Though community members in each project site had had the opportunity to learn from the trials and errors of their own experiences in ecotourism, they had not yet gained insights from what others were doing in other places. In fact, in most cases, people in each project site had no idea that other communities similar to their own were involved in comparable projects and facing parallel challenges.

### ***Reflections from the Trueque***

*"A lot of the community members got little things from it, like a local guide talking to a local guide from another lodge, like 'I do this with my tourists,' those type of things. They learned a lot like that" (BA, 7/27)*

A fundamental premise of the initiative funded by CEPF is that first-hand, personal experiences are important to learning. On-site, interactive workshops at Chalalan, Kapawi, and Posada Amazonas allowed community members and tour operators with similar cultural backgrounds and environments to visit each others' regions and lodges personally, and to see and compare for themselves the kinds of successes and challenges other communities like their own were and are facing in ecotourism.

Often the exchange of experience and learning in community conservation and development projects is mediated by conservationists, academic researchers, and other outsiders. The absence of face to face dialogue between local leaders is a lost opportunity for representatives of each community to learn not only by hearing and witnessing other experiences, but also by consciously reflecting on and summarizing their own experiences for others. Always, the best way to learn something profoundly is to teach it to others.

The insights gained from the "South-to-South" exchanges funded by CEPF between peoples of the three Amazonian regions and Andean nations have resulted in a series of lessons learned and criteria for success in establishing and managing community-based ecotourism, which benefits biodiversity conservation. A second result has been a multiplier effect in which representatives have carried the lessons of what they saw and heard back to their own communities and projects, energized and infused with new and uniquely personal insights. The opportunity to represent themselves before regional and international audiences of conservationists, development workers, ecotourism experts, and academics also furthered the longer term goal of promoting self-determination for indigenous groups and other locals participating in ecotourism in the Amazon.

### 1.3 The Tropical Andes and the Vilcabamba-Amoró Corridor

The Vilcabamba-Amoró corridor encompasses perhaps the most biologically and culturally diverse terrestrial habitat in the world. Two of the three ecotourism took place in the Tambopata-Pilón Lajas complex of the Vilcabamba-Amoró Corridor. The Tambopata-Pilón Lajas complex includes the Tambopata-Candamo Reserved Zone (4,886 square kms) and the Bahuaja-Sonene National Park (10,914 square kms) in Peru, and the Madidi National Park (18,960 square kms) and Integrated Management Area (4,745 square kms), and the Pilón Lajas Biosphere Reserve (4,000 square kms) and Indigenous Territory. Major threats to the Tropical Andes include deforestation due to seasonal burning and grazing, agriculture, and mining. Ecotourism is one potentially lucrative economic activity that offers the promise of improving local livelihoods while also creating incentives to protect (or even enhance) the integrity of natural habitats.

***Reflections from the Trueque***

*"The conversations between Community members opened many channels for understanding, especially for the Achuar. They began to see they were not alone in their community project, that there were other experiences, and they could see how others were involved" (AR, 6/16).*

Through their involvement in the ecolodge exchange, the people of San Jose and Infierno, and the Achuar--three indigenous and mixed-ethnic communities in and around the Vilcabamba-Amoró Corridor--have demonstrated some of their capacity and commitment to collaborate as long-term allies in conservation efforts in the Corridor. The ethnographic research, on-site workshops, consensus-building activities, and locally-produced reports about ecotourism conducted in the Trueque has been aimed at supporting wider conservation goals of CEPF in the

Corridor, specifically, those goals related to building community environmental awareness and capacity for resource management and conservation. For the Trueque, ecotourism has been the lens through which these goals have been perceived and promoted. Of particular interest has been the question of how local involvement in ecotourism can bring about changes in people's attitudes and behaviors in ways that can ensure long-term stewardship of biological diversity throughout the Corridor. Though the workshop exchanges were limited to just three local communities in Ecuador, Peru, and Bolivia, a broader, long-term intent is to disseminate lessons learned from these "model" sites to other communities throughout the Corridor.

#### **1.4 Conservation Goals of the Ecolodge Exchange**

The long-term goal of the Trueque was to help increase active participation of local communities in biodiversity conservation and natural resource management in the Vilcabamba-Amboró Corridor. The targeted conservation outcomes are threefold: 1) help ensure that encounter rates for flagship predator and herbivore species, especially felines, ungulates, and primates marketed as tourist attractions, either remain stable or even increase by in three selected projects; 2) catalyze the creation of community-based reserves, ecotourism and/or strict protection, in each site to protect threatened ecosystems and species; 3) increase the involvement of local leaders, organizations, and communities in conservation efforts out in the Vilcabamba-Amboró Corridor.

#### **1.5 Project Purpose**

The purpose of the Trueque was to make ecotourism effectively serve community-based conservation and natural resource management in the Vilcabamba-Amboró Corridor. Our commitment by the end of the project was to create at least one alliance among three or more community-based ecotourism projects in the Vilcabamba-Amboró Corridor to cooperate in managing and monitoring impacts of ecotourism. We also projected a goal of encouraging local participants to assist in development of new community-based ecotourism projects in the Vilcabamba-Amboró Corridor, all complying with conservation and management standards identified in project. A third intention was to get more community-based ecotourism projects engaged in in developing, monitoring, and enforcing management plans for habitats and species of primary interest to ecotourists.

#### **1.6 Project Goals**

- 1) Develop conservation standards for community-based ecotourism in the Vilcabamba-Amboró Corridor;
- 2) Establish long-term plan for measuring and monitoring impacts of ecotourism in the Vilcabamba-Amboró Corridor;
- 3) Facilitate communication and coordination between ecotourism stakeholders in the Vilcabamba-Amboró Corridor;
- 4) Share strategies and standards for linking ecotourism effectively with conservation with various audiences throughout the Vilcabamba-Amboró Corridor and beyond.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

This goal was to be achieved through the collection and evaluation of ethnographic data pertaining to the social, economic, cultural, and environmental costs and benefits of ecotourism in the three participating communities of Kapawi, Chalalan, and Posada Amazonas. An integrated database containing indicators of ecotourism's respective impacts in Kapawi, Chalalan, and Posada Amazonas was created.

Pre-workshop meetings were held in each of three stakeholder communities of Kapawi, Chalalan, and Posada Amazonas to discuss social, economic, cultural, and environmental costs and benefits of ecotourism.

Three five-day, on-site ecotourism workshops were designed (including agendas, participatory activities, topics of discussion, and strategies for generating consensus), organized, and facilitated between Kapawi, Chalalan, and Posada Amazonas to exchange lessons learned about social, economic, cultural, and environmental costs and benefits of ecotourism.

Post-workshop meetings held in stakeholder communities of Chalalan and Posada Amazonas to discuss lessons learned in the workshops.

Three presentations about ecotourism in Kapawi, Chalalan, and Posada Amazonas were created by community leaders in each site (using posters, photographs, and stories) and delivered to workshop participants and invitees from the non-profit, governmental, and academic sectors in Ecuador, Peru, and Bolivia.

***Reflections from the Trueque***

*"I feel like we did something that served people, not just for these communities, but also for other communities, so that they can see how ecotourism really is. It's not always the way tour operators paint it" (JG, 7/16).*

## CHAPTER 2: The Participants: Three Ecotourism Partnerships

Of all the ecotourism projects in the Amazon, Chalalan, Kapawi, and Posada Amazonas were the three most ideally suited for the "Host to Host" exchanges. Aside from their laudable commitment to promoting local participation, meeting community needs, and proactively promoting natural resource conservation, the three lodges share a lot in common: they each have 4-6 years in operation; they are each located in the lowland tropical rainforest regions of Andean countries. They each are owned partially or completely by local communities, and beyond merely providing benefits to locals, they each promote a model of co-management and shared decision making. In each case, the participating communities are distinguished by strong indigenous heritage and concern for valuing local traditions. Each lodge is filling an alternative market niche in the tourism industry, and each operates in a context of frequent national economic and political instability. The many points of overlap between Chalalan, Kapawi, and Posada Amazonas are compelling if for no other reason than the fact they offer a tremendous opportunity to compare and contrast experiences in ecotourism under similar kinds of social, economic, political, and environmental conditions. The new learning that has emerged the Trueque comparison is invaluable not only for the lodge owners themselves, but also for the larger public interested in promoting ecotourism as a strategy for linking conservation and development.

The differences between the lodges have also present an ideal opportunity to exchange ideas on varying strategies and models for implementing community based ecotourism. The Chalalan Ecolodge in Bolivia is 100% owned and managed by the community with support from U.S. nongovernmental funding and training; Posada Amazonas in Peru splits profits and management between a local community and a national private tourism company; and the Kapawi Ecolodge operates more like a concession, which rents land and pays per head charges for each tourist to the local Achuar communities. Each approach offers distinct advantages and disadvantages to balancing the goals of profit, conservation, and community development in areas of high cultural and biological diversity. The opportunity to assess collaboratively the pros and cons of these strategies is precisely the intent of the proposed ecolodge exchange.

### 2.1 Chalalan Ecolodge, Bolivia

The people of San Jose de Uchupiamonas, a Quechua-Tacana community within the borders of Bolivia's Madidi National Park created Chalalan with hopes of protecting their resources, securing their territory, and creating new livelihood options for the future. San Josesanos built Chalalan in partnership with two international organizations. They received technical and financial support from Conservation International and the financial support of the Inter-American Development Bank. After five years of training and capacity building, San Josesanos assumed full



*Chalalan Ecolodge*

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

ownership and management of Chalalan in 2002. Fifty percent of all profits to a community fund, which is used primarily for health and education. Chalalan is located in a biological corridor that connects Manu National Park and Bahuaja Sonene National Park in Peru with Madidi National Park in Bolivia. A “hotspot” for biodiversity, Madidi's wilderness of 2,000,000 hectares encompasses a variety of ecosystems, including mountain cloud forest, dry tropical forest, humid lowland rainforest, and savanna.

## 2.2 Kapawi Ecolodge, Ecuador

The Kapawi Ecolodge and Reserve, located in southeast Ecuador, is the result of a partnership between the Achuar indigenous federation and Canodros, a private tourism company. The Achuar leased the reserve's land to Canodros for 15 years, until 2011, sharing benefits and decision-making. The Achuar represent a significant portion of the staff, and they participate in training to assume full responsibilities and ownership over Kapawi. The rich plant and wildlife in the area include 523 species of birds. Materials for the lodge and guest huts were collected from the forest and built by the Achuar in traditional architectural style, combined with low-impact technology and design, including waste management and recycling, solar energy, biodegradable soaps, and four-stroke engines.



*Kapawi Ecolodge*

## 2.3 Posada Amazonas, Peru

Posada Amazonas (APA) is a joint venture between the Lima-based private tour company, Rainforest Expeditions (RFE) and the Native Community of Infierno (CNI), a mixed ethnic community of Ese'ejá Indians, mestizos, and Andean colonists. The two partners signed a 20-year contract in 1996, agreeing to split profits (60% to Infierno and 40% to RFE ), and to share in the operation and management of APA. With 48 rooms, a spacious lobby and lounge, and a dining area with cathedral ceilings of hand-woven thatch, APA is luxurious by ecotourism standards. It is located on the Tambopata River in the buffer zone of the Bahuaja-Sonene National Park, a world record-holding reservoir of biodiversity. Key attractions include a stable population of Giant Otters, a macaw clay lick, and several intermittently active Harpy eagle nests.



*Posada Amazonas*

## 2.4 Profile of Participating Lodges

Table 1: Community-based ecotourism lodges in Trueque

<b>LODGE</b>	<b>CHALALAN</b>	<b>POSADA AMAZONAS</b>	<b>KAPAWI</b>
<b>Partnership Model</b>	Community-NGO	Community-Private Company	Federation-Private Company
<b>Country</b>	Bolivia	Peru	Ecuador
<b>Region</b>	Alto Madidi	Tambopata	Pastaza
<b>Protected Area</b>	Madidi Natl. Park 1,895,740 hectares	Bahuaja-Sonene Natl. Park 1,091,416 hectares	Kapawi Reserve 700,131 hectares
<b>Community</b>	San José de Uchupiamonas (60-70 families)	Native Comm. Infierno (120-150 families)	58 Achuar communities (hundreds of families)
<b>Ethnicity</b>	Tacana and Quechua	Ese'ejá, Quechua, and riberenho	Achuar
<b>Partner</b>	Conservation International (NGO)	Rainforest Expeditions (private tourism company)	Canodros, S.A. (private tourism company)
<b>Ecosystem</b>	Lowland rainforest	Lowland rainforest	Lowland rainforest
<b>Revenue-sharing model</b>	50% to shareholders (74 families); 50% to community-wide fund	Profits divided 60% to community and 40% to Rainforest Expeditions	Monthly concession fee from Canodros to Federation of US\$3,800, plus US\$10 per tourist
<b>tourists/year</b>	1,000	5,400	1,800
<b>beds</b>	24	60	50
<b>Website</b>	<a href="http://www.ecotour.org/">http://www.ecotour.org/</a>	<a href="http://www.canodros.com/kapawi/">http://www.canodros.com/kapawi/</a>	<a href="http://www.perunature.com/">http://www.perunature.com/</a>

## 2.5 WHAT WAS THE DREAM [when we created our lodge]?

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<p>THE PARTNERSHIP</p> <p>Improve the quality of life in our community, San Jose de Uchupiamonas</p> <p>THE PRODUCT</p> <ul style="list-style-type: none"> <li>• create a well-crafted lodge, built mostly with local materials;</li> <li>• create a conservation area for ecotourism;</li> <li>• offer a high quality product and service</li> </ul>	<p>THE PARTNERSHIP</p> <p>For the Achuar:</p> <ul style="list-style-type: none"> <li>• Before contact with Canodros, we had a vision of outsiders coming and lots of noise and movement of motors. “We could never interpret or understand that!” Later, we began to see ecotourism as something that could strengthen FINAE, which itself had been recently created, in early 1990s.</li> <li>• Create a partnership for ecotourism that would help protect our culture and Achuar lands.</li> </ul> <p>For Canodros:</p> <ul style="list-style-type: none"> <li>• support the Achuar economically;</li> <li>• help protect the forest;</li> <li>• build a profitable ecotourism business in the Amazon.</li> </ul> <p>THE PRODUCT</p> <p>From the visions of both sides, the dream became a reality—an ecolodge that operates with solar energy, with traditional design of an Achuar home, with very few outside materials.</p>	<p>THE PARTNERSHIP</p> <ul style="list-style-type: none"> <li>• Bring work to the members of our community, CNI, and create a market for products sold by the community.</li> <li>• Improve the quality of life in our community.</li> <li>• Get the youth to think about conservation.</li> </ul> <p>THE PRODUCT</p> <ul style="list-style-type: none"> <li>• do something that had never been done before, and offer a product that didn’t exist;</li> <li>• capitalize on the strength of both partners, the company (RFE) and the community (CNI);</li> <li>• learn what the tourists want, and hope they will our product.</li> </ul>

## 2.6 WHAT SURPRISED US [when we created our lodge]?

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<p><b>THE PARTNERSHIP</b></p> <p>It was a surprise to obtain a financial investment of \$1,250,000 from IDB and \$200,000 from CI.</p> <p><b>THE PRODUCT</b></p> <p>Surprises were:</p> <ul style="list-style-type: none"> <li>• the creation of the Madidi National Park in 1995, where the lodge and community are located;</li> <li>• the number of tourists visiting Chalalan (high);</li> <li>• the fact that there could be bi-lingual guides from San Jose.</li> </ul>	<p><b>THE PARTNERSHIP</b></p> <p>Surprises were:</p> <ul style="list-style-type: none"> <li>• Canodros invested in construction, and the Achuar in materials to build Kapawi. Surprised by the number of trees required, the Achuar decided to sell wood and thatch</li> <li>• [for Achuar] surprise was to have money in our hands</li> <li>• 5 years in, the Achuar began to notice the number of visitors and demanded an increase in the monthly rent.</li> </ul> <p><b>THE PRODUCT</b></p> <p>Surprises were:</p> <ul style="list-style-type: none"> <li>• Ability to maintain high standards for sustainability, despite isolation (i.e., solar energy, waste management, respect for Achuar traditions);</li> <li>• the relatively low number of tourists</li> <li>• the high cost of air operations for logistics and passenger transport</li> <li>• the challenges of lodge maintenance, which are formidable with the mix of natural materials, the processes of decay, and climatic of the Amazon.</li> </ul>	<p><b>THE PARTNERHIP</b></p> <p>Surprises were:</p> <ul style="list-style-type: none"> <li>• that a private company could work with a native community;</li> <li>• the quick commercial success of the lodge and its appeal to tourists;</li> <li>• the evolution of the CC and the community [in relation to assuming responsibility and partial management the lodge;</li> <li>• outside resistance to the partnership</li> <li>• the length of the agreement [some perceive as too long, others as too short];</li> <li>• community members' quick adaptability to the lodge and working there as staff</li> <li>• the company's efficiency and skill at marketing the lodge</li> </ul> <p><b>THE PRODUCT</b></p> <p>Surprises were:</p> <ul style="list-style-type: none"> <li>• the sheer scale of the lodge— architecturally and operationally;</li> <li>• the effort and community labor through faenas it took to build lodge;</li> <li>• the appeal of cultural aspects of our lodge to tourists</li> </ul>

## 2.7 CURRENT CHALLENGES

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<p><b>THE PARTNERSHIP</b> Strive to provide a sustainable future for San Jose by generating employment, based in the management and conservation of cultural and natural resources.</p> <p><b>THE PRODUCT</b> Build the market for Chalalan, particularly in the international sphere.</p>	<p><b>THE PARTNERSHIP</b></p> <ul style="list-style-type: none"> <li>• Establish steps for transferring ownership to the Achuar. This entails improving training for the Achuar in administrative positions so that they can assume full responsibility when the agreement with Canodros ends.</li> <li>• Create opportunities for formal training in four areas: a) English language, eventually to have Achuar only as guides; b) management of lodge operations; c) lodge administration; d) marketing</li> <li>• Learn the merits of other operations similar to ours and adapt their practices to our own.</li> </ul> <p><b>THE PRODUCT</b></p> <ul style="list-style-type: none"> <li>• Lower the costs of our logistics and optimize air operations.</li> <li>• Build a “spa”</li> <li>• Create a zone for tourism, and in that area, prohibit hunting and try to build awareness among the Achuar about managing hunting.</li> </ul>	<p><b>THE PARTNERSHIP</b></p> <p><i>Internal to lodge:</i></p> <ul style="list-style-type: none"> <li>• Lack of preparation (professional, technical, and educational)</li> <li>• Regular rotation of personnel, which leads to greater need for preparation.</li> </ul> <p><i>External to lodge:</i></p> <ul style="list-style-type: none"> <li>• Political instability; war and recession</li> <li>• Hunting in and around the community.</li> <li>• Current intent to split community between Ese’ija and ribernhos</li> <li>• Tendency in community to disregard agreements and contracts.</li> <li>• Rumors and suspicions about Posada Amazonas in the community.</li> <li>• Difficult for community to distinguish community issues from company ones.</li> </ul> <p><b>THE PRODUCT</b></p> <p>The overall challenge is to create more benefits for the community through satellite projects, protect the resources through better management, diversify our product, and shorten the “low season” for the lodge. We need to do all of this, while also maintaining high quality service and infrastructure, and also living up to ecological standards.</p>

## 2.8 FUTURE CHALLENGES

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<p><b>THE PARTNERSHIP</b></p> <ul style="list-style-type: none"> <li>• maintain a positive image of the community-based company;</li> <li>• promote legislation for other community-based companies in Bolivia.</li> </ul> <p><b>THE PRODUCT</b></p> <ul style="list-style-type: none"> <li>• build more professional capacity in community—through higher formal education and other forms of training—in various executive and staff positions;</li> <li>• improve service in the lodge, and identify and development new attractions;</li> <li>• construct more infrastructure;</li> <li>• open an office in capital, La Paz</li> </ul>	<p><b>THE PARTNERSHIP</b></p> <ul style="list-style-type: none"> <li>• ally ourselves with other lodges;</li> <li>• manage the hotel on our own [the Achuar];</li> <li>• improve relations between Canodros and FINAE by creating a new role for an intermediary who would be neutral and help maintain good communication (minimal misunderstanding and jealousy) between the partners;</li> <li>• create an Ecotourism Committee consisting of Achuar representatives who would provide support necessary for the transfer of management and ownership of Kapawi to FINAE.</li> </ul> <p><b>THE PRODUCT</b></p> <ul style="list-style-type: none"> <li>• construct new observation tower;</li> <li>• acquire a company-owned airplane;</li> <li>• build new canoes and buy more motors;</li> <li>• host a minimum of 2,000 guests per year, improving marketing, and raising our hotel and service standards;</li> <li>• improve guides' equipment, including binoculars, telescopes, field books, etc.</li> <li>• improve radio communications, perhaps by installing a satellite phone system.</li> </ul>	<p><b>THE PRODUCT</b></p> <ul style="list-style-type: none"> <li>• innovate and expand our market;</li> <li>• play up more of the cultural aspects of Posada Amazonas;</li> <li>• attract specialized markets;</li> <li>• improve the infrastructure and equipment</li> </ul>

## 2.9 WHAT MAKES US PROUD?

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<p>We are proud:</p> <ul style="list-style-type: none"> <li>• We were the the first community-run enterprise in Bolivia.</li> <li>• Each year the number of tourists increases.</li> <li>• We offer high-quality tourism and professional service.</li> <li>• We have helped restore wild populations of fauna in the area around the lodge.</li> </ul>	<p>We are proud:</p> <ul style="list-style-type: none"> <li>• We are associated with an indigenous federation so well structured, like FINAE, and with the Achuar who are so proud of their culture.</li> <li>• Through Kapawi, we have gained contacts, such as with the NGO, Pachamama, and with Aerosentsak.</li> <li>• There is no other indigenous group partnered with a private company in Ecuador.</li> <li>• We are a model for other indigenous communities.</li> <li>• We are the only lodge in the Amazon Basin that relies on solar energy.</li> <li>• We have gained prizes and recognition for our work internationally.</li> <li>• Despite our isolation, Kapawi offers all of the services of a first-class hotel.</li> <li>• We are proud of the benefits that Kapawi offers to the Achuar community, and this is also appreciated by tourists.</li> <li>• People admire the work we do.</li> </ul>	<p>We are proud:</p> <ul style="list-style-type: none"> <li>• of the cook at APA (before he didn't know how to clean a pot);</li> <li>• of our "monstrous" lodge;</li> <li>• to have partners and friends like Eduardo and Kurt [co-owners, RFE];</li> <li>• to be workers and owners of APA;</li> <li>• when the CC is right, they argue with their partners (RFE) and win;</li> <li>• of the prizes and recognition gained nationally and internationally;</li> <li>• when Pancho Ccala (member of CC) talks about feedback from tourist satisfaction surveys;</li> <li>• our 92% client satisfaction;</li> <li>• that we [as community] are informed about important aspects of the business;</li> <li>• to have "voice and vote" [community];</li> <li>• to be continuing to search for economic alternatives to continue improving quality of life in Infierno;</li> <li>• to have a well-defined product;</li> <li>• that the community manages APA;</li> <li>• of our image that fosters loyalty;</li> <li>• of a good marketing director in RFE.</li> </ul>

## 2.10 OUR ADVICE FOR OTHERS?

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<p>THE PARTNERSHIP</p> <ul style="list-style-type: none"> <li>• Have perseverance in what you want to do with ecotourism.</li> <li>• Focus on building local capacity to manage conflicts and make strategic decisions.</li> <li>• Ensure that the community is prepared for possible changes: in attitude, and in the shift from traditional activities to entrepreneurial ones.</li> </ul> <p>THE PRODUCT</p> <ul style="list-style-type: none"> <li>• Have an area defined for development ecotourism with natural attractions and wildlife.</li> <li>• Make sure to have ongoing training in all staff and managerial positions.</li> <li>• Even when concerned with conservation, community development, and local capacity-building, make sure to maintain a high level of service and quality.</li> <li>• For communities: assume control and responsibility for the lodge as your own.</li> </ul>	<p>THE PARTNERSHIP</p> <ul style="list-style-type: none"> <li>• Before signing the agreement, analyze well the pros and cons of your project. This is an obligation for both partners.</li> <li>• Comply with all of the terms you have agreed to.</li> </ul> <p>THE PRODUCT</p> <ul style="list-style-type: none"> <li>• Do not get involved with petroleum industry, loggers, or miners, because these activities are more degrading to the environment, your livelihood, and by extension, to your ecotourism product.</li> <li>• Community-based ecotourism projects are the most viable alternatives for protecting the forest and local traditions.</li> <li>• Make proactive efforts to minimize contamination through ecotourism by relying on solar energy, using 4-stroke engines for canoes, and other ecologically-oriented strategies.</li> </ul>	<p>THE PARTNERSHIP</p> <ul style="list-style-type: none"> <li>• Focus on training;</li> <li>• Keep in mind the needs of the tourists;</li> <li>• Share decision-making;</li> <li>• Focus on building trust—legal contracts do not eliminate suspicions or misunderstandings;</li> <li>• Don't copy blindly what others have done;</li> <li>• Emphasis good communication between partners.</li> </ul> <p>THE PRODUCT</p> <ul style="list-style-type: none"> <li>• Never sell what you don't have</li> <li>• Don't underestimate any of the cultural and natural resources you have for tourism;</li> <li>• Make sure your product is well articulated, to yourselves and to your clients;</li> <li>• The product must be developed with the tourists in mind.</li> </ul>

**CHAPTER 3:  
The Process: Local Ethnography, Tri-National Dialogue, Consensus**

The “Trueque Amazonico” had six main phases: 1) collection of comparative ethnographic data in communities managing Kapawi, Chalalan, and Posada Amazonas; 2) compilation and analysis of data three presentations; 3) implementation of workshops and development of consensus on best practices (or at least lessons learned) in community-based ecotourism; 4) dissemination of lessons learned to wider community of stakeholders in Vilcabamba-Amboro.

**Project Trajectory**

Date	Project Phase
January 2001-August 2002	Participatory planning in Ecuador, Peru, and Bolivia
September-October 2002	Consolidation of Project Team and development of research tools
November-December 2002	Comparative ethnographic analysis
January-February 2003	Compilation and analysis of data, and preparation of community-led presentations
March-May 2003	Workshops development and implementation, consensus-building discussions, and press seminars
Ongoing	Compilation and dissemination of results
Ongoing	Further collaboration

**3.1 Participatory Planning**

On January 3-5, 2001, ten representatives from Chalalan, Kapawi, and Posada Amazonas gathered in Tambopata, Peru to meet one another for the first time, and to agree on the goals, objectives, and time frame for an series of exchanges. The project ultimately funded by CEPF reflected quite accurately the ideas discussed in that three-day meeting.

**Original Planning Team**

Country	Name	Affiliation (at the time)
PERU	Eduardo Nycander	Rainforest Expeditions
	Juan Pasha	Native Community of Infierno
	Abraham Lavado	Native Community of Infierno
	Carlos Dejavisio	Native Community of Infierno
ECUADOR	Santiago Durand	Native Community of Infierno
	Gabriel Jaramillo	Kapawi Ecolodge and Reserve
BOLIVIA	Arnaldo Rodriguez	Kapawi Ecolodge and Reserve
	Candido Pastor	Conservation International-Bolivia
	Romulo Trujillo	Chalalan Ecolodge
U.S.	Zenon Limaco	San Jose de Uchupiamonas
	Amanda Stronza	Stanford University
	Eileen Finucane	Conservation International

### 3.2 Project Team

Three field coordinators from Bolivia, Peru, and Ecuador were contracted to carry out field research in each of the ecolodge communities. During a two-day meeting in Lima, Peru on October 7-9, 2002 they joined with leaders at Selva Reps and the Project Director to establish a team, agree on a timeline for research, and develop a methodology for measuring impacts of ecotourism in each site.

The Project Team, comprising the Director, the three Country Coordinators, and an advisor from CI-Ecuador met for a three-day planning meeting in Quito, Ecuador, December 19-21, 2002 to carry out various objectives, including: a) comparing notes and taking stock of lessons learned so far from the field work; b) troubleshooting any problems, either programmatic or budgetary; c) creating the database for the ethnographic quantitative and qualitative data; d) agreeing on timing of activities for upcoming project phases, including selecting dates for the ecolodge exchange workshops and press conferences; e) discussing various sorts of logistics (i.e., selecting delegates from each site, arranging for passports and airfares, reserving hotel rooms, etc.); and, f) brainstorming themes for workshops.

#### ***Reflections from the Trueque***

*"I learned that to do this kind of project, it's important to have good participation within the team (that directs the project). Community members help a lot. They make you see whether what you're planning to do is going to be effective or not, and they help you concentrate on the things that will be of most interest and relevance the Community. So, in this aspect, the Trueque was very useful. Normally, a whole project comes from outside, and the community contributes nothing. But in this case, having the participation of community members on the team, we were able to understand and plan everything clearly" (JG, 7/16).*

The Project Team, comprising the Director, three Country Coordinators, and three Community Leaders met for two three-day planning meetings in Chalalan, Bolivia February 17-20, 2003, and in Posada Amazonas, Peru, March 5-7, 2003. In these meetings we completed various objectives, including consolidating the Project Team; reporting back on field data collection and initial lessons learned; coordinating logistics (all international and national airfare, local transportation, and hotel and meal accommodations in Quito, Lima, La Paz, Rurrenabaque, and Puyo for 30-35 participants traveling between the three countries); preparing



*Tri-National Project Team*

community-led presentations about Kapawi, Chalalan, and Posada Amazonas; and most importantly, developing the tools and methods for generating discussion and participatory analysis in the ecolodge exchange workshops on standards and lessons learned in community-based ecotourism.

One local leader from each community was selected and contracted to serve as “Community Leaders” in the Project Team. Each Community Leader was responsible for facilitating the creation of expositions about their respective lodges that were presented in each of the workshops and press conferences.

### 3.3 Ethnographic Research

Project Coordinators collected ethnographic data in each of the three field sites. At least sixty households in each community participating in an interview that lasted between 2-3 hours. People’s ideas, concerns, and opinions about ecotourism in their respective communities were solicited in each interview. Also, at least one representative, male or female, from each household drew two pictures, one of how they perceive their community today and the second of how they would like their community to be in the future. In Bolivia, 67 household interviews were completed; in Peru, 60; in Ecuador, 55. Selected univariate, descriptive analyses of the data was distributed and discussed at the workshops.



*Maria Isabel Endara  
conducts interview*

### 3.4 Community-led presentations

The three field coordinators from Bolivia, Peru, and Ecuador collaborated with the three community leaders from Chalalan, Posada Amazonas, and Kapawi, respectively, to prepare the presentations. The presentations included a history and overview of each lodge—characterized from the perspective of community members—and were presented at the ecolodge exchange workshops and the press conferences that took place following the workshops in Chalalan (in La Paz) and Kapawi (in Quito).



*Guido Mamani presents Chalalan case*

### 3.5 Workshop Preparation

A critical assumption inherent to the success of the ecotourism exchange was that community members from each of the three participating lodges--Kapawi, Chalalan, and Posada Amazonas—would want to interact amicably with each other and to invest energy in learning from one another. Nevertheless, the cross-cultural and social dynamics of the workshops were difficult to predict. With this in mind, the workshops were planned with special attention to facilitating an atmosphere of mutual respect, openness, and fun. Rather than limit activities to

lectures and seminars, the workshops planners organized strategies for learning and listening that emphasized creativity and enjoyment as much as information sharing.

We sought to arrive at standards or “best practices” by identifying the themes of discussion we addressed throughout the three workshops. The basis for these discussions was twofold: participants’ respective experiences in community-based ecotourism and the comparative, ethnographic data collected (as part of the funded project) in each of the three sites. Various



*Project Team meeting in Chalalan*

cultural, social, and economic impacts of ecotourism were assessed the field research in each site, and 2-3 specific indicators for monitoring the impacts over time were identified by representatives from each site in the final workshop in Kapawi. Environmental impacts of ecotourism were not assessed. A future goal is to include biological component to the study of impacts.

Also in preparation for the workshops, three researchers from Ecuador, Peru, and Bolivia lived in each of the three study sites for at least two months to conduct ethnographic research and semi-structured household interviews in the communities. The interviews and participant observation focused on social, economic, cultural, and environmental changes introduced by ecotourism. Project Coordinators collected ethnographic data in each of the three field sites. At least sixty households in each community participating in an interview that lasted between 2-3 hours. People’s ideas, concerns, and opinions about ecotourism in their respective communities were solicited in each interview. In Bolivia, 67 household interviews were completed; in Peru, 60; in Ecuador, 55, which represent 45%, 55% and 7% of the populations of the communities, Infierno, San Jose de Uchupiamonas and the Achuar Federation, respectively. Selected univariate, descriptive analyses of the data was distributed and discussed at the workshops.

**Reflections from the Trueque**

*“Something that interested me a lot was the methodology that the coordinators of the project used for the workshops, the activities, and the research. I noticed that in each of the three workshops, they incorporated different information, different themes, but there was also opportunity to expand” (BP, 6/17).*

We used stratified purposive sampling to ensure broad representation across the three communities. Within communities, we used random sampling based on a frame. The interview guide shared a common framework across the three communities but included some site-specific questions. Interviews included open-ended and structured questions broadly addressing impacts and perceptions of respondents’ lives, as individuals and as members of households and communities newly immersed in ecotourism. Questions focused on demographics; household economics, with small-farm and livestock production, values of wildlife, connection with the western market economy, and opinions about tourism, including perceived advantages,

disadvantages, benefits, and changes introduced by tourism in the family, household, and community.

Table 2 Interview and workshop participants by community

Country	Community	Lodge	Household Interviews (% of community population)	Community delegates in workshops
Peru	Infierno	Posada Amazonas	N=62 (45%)	6
Bolivia	San Jose	Chalalán	N=67 (55%)	8
Ecuador	Achuar	Kapawi	N=35 (7%)	8
<i>Total</i>			<i>171</i>	<i>22</i>

### 3.6 Participation

A key purpose of the Trueque Amazonico was to involve *local* stakeholders in the analysis and discussion of impacts of community-based ecotourism. Local participation in all aspects of the project, from proposal development, to data collection and analysis to facilitating the discussions of lessons learned, was emphasized from the beginning. The same set of 6-8 delegates from each lodge attended all three workshops, which allowed for continuity in discussions throughout the Trueque. Other key participants in the Trueque included non-profit groups, researchers, government, and private sector representatives from tourism, natural resource management, and conservation in Vilcabamba-Amboro, and more broadly, the Tropical Andes.



*First workshop in Posada Amazonas*

To include these stakeholders in the ecolodge exchange, Conservation International offices in Bolivia, Ecuador, and Peru assisted by selecting three invitees from each country to attend the workshops. Having these additional participants allowed for lessons to be learned not just between the communities, but also among other ecotourism players throughout the region. Equally important was the opportunity for community members from Kapawi, Chalalan, and Posada Amazonas to learn from the experiences and perspectives of invitees.

***Reflections from the Trueque***

*"What I liked the most about the Trueque was that it wasn't limited to the upper rung. Usually these kind of workshops . . . occur in the higher levels of the NGO's. We always say we want to hear the opinions of the communities, but it's one thing to want to hear it, and it's another thing to have to hear it. There were times when someone would say something and we would all except it, 'Yeah, that's just common truth,' and things like that, and the community members would stand up and say, 'No, it's really not like that, it's like this.'" (BA, 6/17).*

### 3.7 Outreach

An important objective of the Trueque was to share lessons learned with a wide range of ecotourism actors throughout the Vilcabamba-Amboro Corridor, not just the leaders and partners in Chalalan, Posada Amazonas, and Kapawi. Initially, the plan for disseminating lessons was to have delegates from the workshops visit other communities in the Corridor and share their experiences. The strategy changed to include two separate outreach efforts. First, country offices of Conservation International in Ecuador, Peru, and Bolivia were asked to select three invitees from the conservation and ecotourism sector in their respective countries to participate in the workshops. In Posada Amazonas, the invitees included: a representative for ecotourism in the government Institute for Natural Resources (INRENA), the president of the Federation of Indigenous Peoples in Venezuela, a micro-enterprise representative from Conservation International's local office in Puerto Maldonado, and a professor of ecotourism from one of Peru's major universities (Universidad Agraria La Molina). In Chalalan, the invitees included: the president of a hotel association in Cochabamba, an ecotourism scholar and author from the U.S., the sales director from a major travel agency in La Paz, the community leader of a new ecotourism project in Amboro, an ecotourism consultant working with the Bolivia Association for the Defense of Nature, and, a television reporter and photographer from La Paz (who produced a 10-minute feature about the project shown on Bolivian television one week after the workshop). In Kapawi, the invitees included the president of the Ecotourism Association of Ecuador, the executive director of Conservation International-Ecuador, a representative from the Ministry of Tourism, and a consultant in environmental monitoring.



*Press conference in Quito*

A second outreach effort included half-day seminars in which members of the press were invited as well as invitees of Conservation International. A 4-hour press conference attended by 30-40 people, including members of the radio, television, and print press, was held in La Paz, Bolivia on April 15. In addition, the project team held two radio interviews and one television interview to explain the purpose of the ecolodge exchange and share initial lessons learned.

### **3.8 Lessons Learned in Organization and Management of the Trueque**

#### Be Realistic About Costs

The costs of the Trueque were higher than the planners had anticipated. Future managers of community-to-community exchanges should be especially cautious to factor in the full range of costs that are required to move even just a few participants between two or more remote sites. Though the local costs of the exchange may be minimal, the structure of air travel may necessarily require participants to pass through capital cities and stay overnight rather than travel directly between rural community locations. These detours and overnight delays introduce a whole host of extra costs to travel, including airport taxes (which alone totaled nearly \$4,000 for the Trueque), passport fees, and, most significantly, the high price of in-country flights between the capital cities of Lima, La Paz, and Quito and the lodge locations, which totaled \$26,000. Finally, even though each ecolodge in the Trueque agreed to provide meals and lodging free of charge to the workshop participants, the costs of lodging and meals for delegates *in transit* to the lodges, totaled just over \$11,000.

#### Conduct a Needs Assessment

Have sufficient funds necessary to develop the workshops at a somewhat leisurely pace. The key is to make sure the themes of the workshops address real concerns and interests participants have. Therefore, organizers and facilitators need ample time to conduct needs assessments with participants—what do they know, what do they want to know, and what’s worth discussing—and then develop activities and materials that accurately address those needs.

#### Make Project Planning and Management Participatory

Try to assemble a Project Team with a mix of complementary work styles but also with a mix of ethnic and social backgrounds that match those of the participants. The Trueque’s Project Team worked exceptionally well. It comprised three Field Coordinators collaborating with three Community Leaders to perform various tasks, including selecting workshop delegates, coordinating in-country logistics, preparing presentations, collecting and analyzing data, and designing activities for the workshops, all in collaboration with the Project Director. The team approach helped ensure the workshops were planned with a wide range of concerns and perspectives in mind. The Field Coordinators brought an international perspective on conservation and ecotourism to the discussions, as well as an ability to conduct field research in an objective and professional manner. They were also invaluable in coordinating capital city logistics in the three countries. The Community Leaders brought critical local perspectives to the planning table, especially concerning the kinds of questions, activities, and themes that were most meaningful, relevant, and useful to the communities involved in the exchange. The depth and scope of learning about the main themes of the Trueque, namely, ecotourism, conservation, community development, that took place in the Project Team meetings was especially rich.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

Many of the final “lessons learned” in the Trueque emerged from the interactions and “mini-workshops” of the Project Team.

### Nurture Local Enthusiasm Throughout Planning Process

We learned that enthusiasm and expectations about the Trueque remained high across the three sites, even over the one and a half-year delay between presenting the idea, writing the proposal, and gaining funding. As the Trueque was not a project that offered significant amounts of money directly to local communities (most was absorbed by travel costs for just a very small percentage of the total community population), we took this as an indicator of the true relevance and value of this exchange as perceived at a grassroots level. In addition to simply stumbling upon a good idea, we also actively strived to keep the enthusiasm high. The Project Director maintained regular and frequent communication between the project team, key personnel in CI offices in the U.S. and Latin America, and the three ecolodge companies. In turn, the companies also made strong commitments to keeping their indigenous partners updated on plans for the exchange. At least two community-based meetings in each site were organized to present plans for the exchange and to request in-kind support in the form of lodging and meals, as well as local participation, in each lodge. These informational meetings were especially important for communicating the potential significance of the exchange to members of the communities who are not leaders or are not directly involved in ecotourism.

### Notice Important Differences, Even When Making Comparisons

In seeking to develop comparative indicators for ecotourism impacts in each site, we learned how little in common the communities managing Kapawi, Chalalan, and Posada Amazonas really have. In some cases, their differences in terms of socio-economic status, involvement with the market, and level of participation in ecotourism was so pronounced that the Project Team had trouble articulating questions about such issues that could be used to compare results in all three sites. For example, we wanted to test how involvement in ecotourism correlates with different levels of income from farming (do people working in ecotourism produce and earn less in the agricultural market? do they convert fewer hectares of forest into farm?). But this was difficult to compare with the same research methodology across sites because the level of market involvement and agricultural activity in each region varied so greatly. On the other hand, these differences between the communities managing Kapawi, Chalalan, and Posada Amazonas warranted all the more the need for an exchange of lessons learned. The lodges they co-own have gained similar successes in linking conservation and development in the Amazon, but they’ve employed different strategies and included different kinds of social actors.

### Hire Someone to Handle Logistics

Be sure to have a person exclusively in charge of logistics, including making airline and hotel reservations, arranging transfers, planning meals, and securing all international visa and passport requirements. The sheer volume of these details, even for a relatively small exchange (in our case 10-12 participants from each country) required many hours of effort that could have been

delegated to an assistant, leaving more time for substantive work on ethnographic analysis and workshop development to the Project Team.

### Be Careful to Treat all Communities and/or Delegates Equally

For example, make an effort to find lodging for all of the members in the same hotel. Details such as this help foster a feeling of teamwork, or even “family” as one participant noted in between workshop activities. Also, this strategy helps stave off jealousy over the “best” accommodations.

### Workshop Preparation

- Flexibility is essential, not only for changing the location of the workshop when the location is remote and difficult to reach, especially because of climatic and logistical problems, but also to reorganize activities and discussions in the workshop in accordance with participants’ concerns and requests.
- Always have a clear agenda indicating themes to discuss and goals to achieve in each workshop and in each step of the process.

### Develop a Set of Questions to Help Channel Workshop Discussions

A list of questions (ranging from the big to the small, and the concrete to the philosophical) can help guide the discussions across a series of themes throughout the workshops. The process of answering questions also allows participants to learn from themselves—about their own insights, history, and dreams for the future—even as they are sharing with others. They write and narrate the stories of their respective projects as they strive to impart to others what they’ve done, as well as what they have learned along the way.

### Move Continuously Between Small and Big Discussion Groups

During the workshops, it is important to start the work in small groups of no more than five persons, to help build confidence, especially among community members who may feel inhibited to talk in front of “extra-local” participants (i.e., scientists, technicians, tour operators, etc.). Also, work in groups from the same lodge or project, which can build on an already present sense of teamwork or family among the delegations, and also helps focus attention on internal concerns as well as those intended to be shared. To achieve consensus, try also to form groups that mix people from different projects. There are many possible configurations—between community members in one group and tour operators and NGOs in the other, or between people focusing on cultural resource management, and those focusing on natural resource management. This helps ensure an exchange of lessons learned is ongoing rather than reserved solely for plenary sessions. Plenary sessions are also important for sharing insights gained in small groups and also for discussing and arriving at points of consensus.

### Give Extra Attention to Local Voices and Local Words

Help facilitate communication across different cultural groups and educational backgrounds by using relatively plain language, avoiding scientific terminology or technical jargon. Note differences in common terms, and build a glossary that captures the different terms of common usage and slang for each of the groups.

As often as possible, make an effort to highlight the comments, questions, and opinions of community members who tend to be underrepresented, misunderstood, or not at all present in meetings of operators and experts in ecotourism and conservation. Special attention to local voices also helps achieve the goal of building a sense of ownership the project and processes of learning and finding solutions. Anything short of that may actually compromise a key objective of the workshops.

### Use “Fun and Games” to Help Foster Good Work

Give groups the freedom to choose the place in which they want to work—on the dock, in a guest room, in the dining room, on canopy tower . . . wherever they find most conducive for generating and recording ideas. Have breaks at the beginning and end of themes, and, in the siesta tradition, after lunch and breakfast. Never underestimate the power of even silly “energizer” games to get the creative and thoughtful juices flowing and prepare your participants to engage in the “work” of the workshops. Have plenty of sweets, juices, and snacks on hand as “food for thought” for working groups.

### Share and Build on Results As You Go

After each workshop, give participants a summary of the discussions, ideas, and points of debate and consensus reached in the previous workshop. The goal here is not only to “inform” the participants, but also to get feedback on how best to capture and present collective results.

### Ask for Feedback

Distribute an evaluation at the close of each workshop to gather recommendations about methodology, logistics, organization, and general comments about the meeting.

## **CHAPTER 4: Lessons Learned**

### **4.1 Themes and Questions**

Over a series of three pre-workshop planning meetings, the Project Team developed a set of seven ecotourism themes to discuss in the Trueque workshops: 1) Ecotourism Partnerships and Products, 2) Building Local Capacity, 3) Sharing Economic Resources, 4) Tracking Change in Communities, 5) Managing Natural and Cultural Resources, and 6) Monitoring Impacts. For each theme, the Team came up with a set of questions, outlined below, to guide the discussions. In every workshop, the participants first divided into groups, organized by lodge or occupation, or area of expertise or interest, or some other criteria, and then answered the questions among themselves. The responses were then presented in plenary, and “best practices” were derived from the collective discussions. The seven chapters in this section outline the responses for each lodge and some transcription of the discussions that ensued. Relevant ethnographic data is inserted throughout as well to complement the workshop results.

#### **Workshop I: POSADA AMAZONAS** Tambopata, Peru, March 19-23, 2003

##### **Themes 1 and 2: Ecotourism Partnerships and Products**

Questions answered by the delegates from Posada Amazonas, Chalalan, and Kapawi:

- ★ What was the dream [for our ecolodge]?
- ★ What surprised us?
- ★ What are our current challenges?
- ★ What are our future challenges?
- ★ What makes us proud?
- ★ What advice do we offer others?
- ★ How does our partnership and lodge meet goals for conservation, community development, local participation, and profit-making?

#### **Workshop II: CHALALAN** Madidi, Bolivia, April 9-13, 2003

##### **Theme #2: Building Local Capacity (for Transfer or Continued Partnership)**

- ★ What is the meaning of “transfer” in our operation?
- ★ Do we have a process in place for the transfer? What is it?
- ★ What difficulties have we faced and what were our solutions?
- ★ What are our concerns for the future?
- ★ How will we know when we’re ready?
- ★ What recommendations do we have for a successful transfer?

### **Theme #3: Sharing Economic Resources**

- ★ What economic resources do we have, and what taxes do we pay?
- ★ What are we doing to increase economic benefits?
- ★ How do we make decisions about how to distribute economic resources?
- ★ How do we distribute the economic resources?
- ★ What are community members doing with the ecotourism earnings they receive?
- ★ What should they be doing with the ecotourism earnings?
- ★ Should the community be advised about what to do with economic resources?
- ★ What would we do if one year we did not receive economic resources from ecotourism?

### **Workshop III: KAPAWI** Pastaza, Ecuador, May 12-16, 2003

### **Theme #5: Tracking Change in Communities**

- ★ Has family life changed since we began to work in ecotourism? In what ways?
- ★ How has the community changed since we opened the ecotourism lodge?
- ★ Has family life changed since we began to work in ecotourism?
- ★ Are we richer now than we were before we began ecotourism? In what ways?
- ★ What kinds of things do we think about now that we never thought before ecotourism?
- ★ What kinds of things do we do now that we never did before ecotourism?
- ★ Do we feel we work more now than we did before ecotourism? In what sense?

### **Theme #6: Managing Natural and Cultural Resources**

#### *Natural Resources:*

- ★ What do the tourists come to see?
- ★ What more could tourists see?
- ★ What factors are threatening these resources? How do we know?
- ★ What are we doing to protect these resources?
- ★ What are the rules, sanctions, and incentives you have created to conserve natural resources, and make agriculture, hunting, and fishing more sustainable in your community?

#### *Cultural Resources:*

- ★ What messages do we want to convey to tourists?
- ★ What aspects of our culture do we want to show to tourists?
- ★ What aspects of our culture do we want to keep private from tourists?
- ★ What aspects of our culture do we see now that we rarely encountered before ecotourism?
- ★ What are the codes of conduct for tourists in your community?

## Theme #7: Monitoring Impacts

- ★ What is monitoring?
- ★ What is the purpose of monitoring?
- ★ What are 2-3 most important changes to monitor in each of the following categories:
  - Ecotourism Operation
  - Social Impacts
  - Economic Impacts
  - Environmental Impacts

### ***Reflections from the Trueque***

*"This was a super important experience because it took us out of the monotony of our daily work. One is involved in day to day work, in the financial aspects, the marketing aspects, and it's like you start to lose the objective truth. In the Trueque, we had the chance to relive the original idea, and that helped us find 'our north' once again" (AR, 6/16).*

## 4.2 First Look at Lessons Learned

The following is a set of lessons we learned in the Trueque, and it serves as centerpiece of this document. As the lessons learned are so fundamental to the organization of the Trueque, we include it twice. First, our intention is to frame the set of problems, challenges, and concerns related to community-based ecotourism we discussed in the workshops. This is an introduction to the following seven chapters, which include points gained during discussions and data from the ethnographic field work. The lessons appear a second time at the end of each chapter, and include a summary of solutions proposed, useful (or even “best”) practices identified, and some consensus on recommendations for future community-based ecotourism initiatives.

### Theme 1: Creating Ecotourism Partnerships

- Strategic Alliance of Community-Company-NGO: The ideal partnership model for community-based ecotourism is one that includes a local community, a private company, and an NGO. In this type of “strategic alliance,” each partner contributes particular sets of knowledge and skills that are complementary.
- Sharing Benefits and Responsibilities: Community partners in ecotourism are not only participating in an ecotourism lodge; they are also assuming responsibility for and investing in the company. In a true strategic alliance between a community, company, and/or NGO, all partners should share not only the benefits but also the responsibilities.
- Support of an Intermediary: Even the most harmonious strategic alliance can benefit from having a person or organization serving as a neutral intermediary to communicate between the community and company and/or NGO. Beyond serving as communicator, an intermediary can also help address expectations the community may have with regard to how ecotourism is addressing (or not) local development needs. The task may entail

developing alternative projects that complement and expand on benefits from ecotourism. Additionally, an intermediary can play the crucial role of capacity-building, confidence-building, and “cheerleading” for members of the community if and when they are feeling inadequate next to their business partners. Ideally, NGOS can assume the intermediary role, but alternatively an individual paid by both partners can work well too.

- Strength in Diversity: Strategic alliances in ecotourism benefits from having different points of view and sets of knowledge and skills of different kinds of partners and collaborators. Any ecotourism project can be strengthened economically, socially, and strategically with the involvement of different cultural groups, broadly speaking, of partners involved, including community members, scientists, administrators, guides, etc.

## **Theme 2: Creating the Ecotourism Product**

- Zoning and Land Tenure: Ideally, ecotourism partnerships are developed and promoted in communities that have legal and secure land tenure over their territory. Once legal tenure is secured, ecotourism partners should zone the area to determine areas for a reserve where no hunting, farming, or extractive activities are permitted, and instead tourism and research are the primary activities.
- Distance between Community and Lodge: Equally important is for the lodge to be located a certain distance from the center of the community. Just as wildlife and habitats are protected by keeping local resource use away from tourism, so too are local livelihoods protected by keeping tourists at bay from communities. In sum, a consciously maintained distance between the lodge and the center of community life can help structure and control the interaction between tourists and locals, while also shielding the community from too much unsolicited attention and/or outside influence.
- Multipurpose Lodge: Research and tourism can and should be complementary activities in an ecotourism lodge. The monitoring of flora and fauna is vitally important to minimize impacts and minimize degradation of resources, both natural and cultural, in and around the area where tourism is practiced. The delegates recommend sponsoring volunteer programs that bring support to the lodge and community while also adding a new market segment to the lodge.
- Management Plan: As in the case of park, an ecotourism lodge must have a management plan, especially before it is opened to visitors. A management plan for a community-based ecotourism lodge should include a prefeasibility study (focusing on ecological, cultural, economic, social costs and benefits), and a financial plan (including a risk analysis). A management plan would also include baseline data on the relative health and abundance of natural resources, particularly those exploited in tourism. To measure the ecological, cultural, economic, and social impacts of tourism over time, a management plan should include a set of indicators and methods monitoring change. The physical and logistical plans for the lodge’s operation and infrastructure should laid out in the management, and it should include explicit consideration of “green” features, such as

energy efficiency, water treatment, and waste management. Finally, a management plan should contain a clear and comprehensive set of “codes of conduct” for tourists. These are generally aimed at the critical task of managing tourist interactions with local residents, wildlife, and plant communities, and may be updated and amended continuously. The goal is to minimize damages to human and wild communities from tourism, and also proactively to raise conservation awareness among visitors.

### **Theme 3: Sharing Economic Resources**

- Support from Allies An advantage of ecotourism partnerships is that communities can seek advice from their strategic allies about how best to distribute, spend, save, and invest the profits and other economic benefits they earn through tourism. This is a type of support, if solicited by the community, that both companies and NGOs as partners can offer. One idea for building local capacity for spending and investing new income from tourism is to establish relatively small funds that can be managed entirely by the community.
- Complementary Projects: Ecotourism is not the sole solution to community development—as it cannot meet everyone’s needs, and it is highly sensitive to many external factors that could cause its downfall. Danger of dependency of ecotourism is a potential problem. Therefore, complementary or “satellite” projects should be promoted in conjunction with ecotourism. These may focus on fish farming, agroforestry, small livestock production, handicraft production, or other activities. The challenge of making such projects economically, socially, and ecologically viable is an important role that NGOs as strategic allies to ecotourism partnerships can play.
- Define Shareholders clearly: Though ecotourism is often described as an endeavor that has the potential to meet the needs of all members of a community equally, not all members of most communities invest equally in ecotourism. Equal returns to all in the face of unequal investments can lead to conflict and resentment. To ensure that returns are distributed fairly according to investments, company “partners” or “shareholders” (accionistas) should be defined clearly. For communities, that may entail defining what a resident of the community must do to become a partner, whether it’s contributing land, labor, or some other form of capital.

### **Theme 4: Building Local Capacity (for Transfer or Continued Partnership)**

- Local Decision-making Body: Community participation in the decision-making is important to allow local partners to assume direct responsibility in the company. Such participation can be fostered through an “Ecotourism Committee” elected and supported by the community.
- Gradual but Systematic Preparation: Capacity building for the local community and their involvement in the work and business of tourism also should be specified explicitly in a partnership agreement. It is advisable to begin with training in relatively easy staff

positions in the lodge and then continue training with increasingly more challenging and responsibility-laden positions. This approach encourages direct community participation in the lodge as they are learning and gaining skills and preparing themselves to assume increasing amounts of responsibility in operating and managing the company.

- Have a plan: The process of capacity building and transferring control and management of the operation from the external partner to the community may take place throughout all matters in the ecotourism operation. It does not imply, however, that it will end. A timeframe for the process should be defined by the partners, and it should follow stages, from the easiest to the most difficult (or least amount of management responsibility to the most). For example, people may first gain experience in service positions, such as in laundry, dining staff, or kitchen assistant, then advance to more skilled or technical positions, such as boat driver, cook, or bartender, and finally, assume professional positions, such as guide, accountant, administrator, manager of marketing, personnel, or operations.
- Separate spheres of decision-making: All decision-making about the company should be open to community in participation; decision-making about the community may or may not involve the company, but that is for the community to decide.
- Use a intermediary: Hire a person to serve as intermediary and communicator between the company and the community (or between the NGO and the community). This “broker” should be paid by both sides, or by all three partners if the strategic alliance is “company-NGO-community.”

### **Theme 5: Managing Cultural and Natural Resources**

- Rules for Guests: Establish and enforce codes of conduct so that tourists can contribute to building pride in local culture rather than disturbing or intruding on local lives and legacies. Codes of conduct should be established for tourist-nature interactions as well as tourist-culture interactions.
- Rules for Hosts: Written rules for resource use and management are useless unless community members are empowered with authority and capacity to monitor and enforce rules, applying locally appropriate sanctions when infractions occur. Both the rules and the sanctions should be defined and understood by the same people who will be obeying, enforcing, monitoring, and sanctioning—namely, members of the community, working in collaboration with their strategic partners in ecotourism.

### **Theme 6: Tracking Changes in the Community**

- Feelings of Empowerment
- Heightened Awareness of Culture
- Stewardship Concern
- Loss of Reciprocity

- Loss of Family Time: A social challenge to overcome in community-based ecotourism is the amount of time lodge staff must spend away from their homes and families. Ideally, companies can find ways to minimize the separation. Some ideas are to ensure that at least one parent remains in the community, and that family activities are planned at the lodge during holidays.

### **Theme 7: Monitoring Impacts**

- Trueque delegates defined monitoring as “measuring to know,” and they agreed that monitoring is critical element of the success of any ecotourism operation because it helps guide decision making. Monitoring allows partners to discern whether they’re achieving social, economic, business, and environmental goals, or in fact, creating new problems. Delegates identified important things to monitor that range from occupancy rates at the lodge to costs of operation and profits to rates of forest disturbance viewing rates of various wildlife species, to local satisfaction with the lodge to perceptions of well-being in the community.
- There appear to be strong correlations between feelings of ownership and local control over ecotourism and perceptions of benefits gained from ecotourism. Also, where sense of control is greatest, respondents have been more likely to identify and support certain types of restrictions in resource use and extraction, particularly hunting, in places where ecotourism is practiced. This early correlation seems to support the notion that strong local participation in ecotourism can help improve chances for conservation, but the analysis is not yet conclusive.

## **ECOTOURISM PARTNERSHIPS AND CONSERVATION Points of Consensus**

In the first Trueque workshop in Posada Amazonas, the tri-national participants focused on the dual theme of “Creating Ecotourism Partnerships and Products. The goal of the discussion in each theme was to list the elements necessary for making both the ecotourism partnership and the ecotourism product achieve four principles: conservation, community development, local participation, and profits. Also under each of these themes, delegates working in three groups, organized by lodge, assessed their major achievements and challenges. The lessons learned in the first workshop followed these guidelines, but the lessons from second and third Trueque workshops (in Chalalan and Kapawi, respectively) were generated differently.

### **A. Zoning and an “Ecotourism Reserve”**

Define how and where tourism will take place in conjunction with and separate from other community activities. The goal is to protect tourism from the community, and also the community from tourism.

Create an off-limits zone, or “ecotourism reserve” where the lodge can be built and maintained separate from other community activities. If an “ecotourism reserve” cannot be created, at the very least, ensure that zones are demarcated to indicate where tourist activities can take place, and where community members will restrict their other economic activities.

If an “ecotourism reserve” is created, it should have the following characteristics:

- It should be distant from the center of the community, where people are engaged in farming, hunting, fishing, and other extractive activities.
- Within the reserve conservation strategies based on incentives and sanctions should be focused on protecting (not just managing) key species and resources exploited as tourist attractions.
- Ideally, the “ecotourism reserve” would be located in a buffer zone of a park so that the ecotourism operation has relative assurance of relatively stable and protected populations of wildlife for viewing with tourists. Some participants conceded that it is not possible for all communities to situate themselves adjacent to national parks, but most agreed it would be the ideal scenario for any community wanting to build a strong ecotourism product.
- It should comprise a diverse set of natural features--flora, fauna, and habitas--that can be serve as attractions to the lodge.

### **B. Legalize Tenure**

Secure land tenure so that communities have long-term incentive to protect their own, legally-titled resource base for tourism. The community should have legal land title or access and long-term use rights to the reserve as well.

### C. Combine Tourism with Research

An ecotourism lodge should serve a dual purpose of accomodating tourists and facilitating research. The activities are complementary in various ways: the reseach station can attract scientists and universities, which become sources of support for the lodge, “scholars in residence” programs are appealing to many tourists and add an attractive component to the lodge’s product profile, the research can be aimed both at pure science and applied studies concerning impacts tourism and monitoring the health of resources used in tourism over time. A volunteer program can be created to help monitor impacts of tourism on resources and can be managed through the research station.

### D. Management Plan

As in the case of park, an ecotourism lodge must have a management plan, especially before it is opened to visitors. A management plan for a community-based ecotourism lodge should include a prefeasibility study (focusing on ecological, cultural, economic, social costs and benefits), and a financial plan (including a risk analysis). A management plan would also include baseline data on the relative health and abundance of natural resources, particularly those exploited in tourism. To measure the ecological, cultural, economic, and social impacts of tourism over time, a management plan should include a set of indicators and methods monitoring change. The physical and logistical plans for the lodge’s operation and infrastructure should laid out in the management, and it should include explicit consideration of “green” features, such as energy efficiency, water treatment, and waste management. Finally, a management plan should contain a clear and comprehensive set of “codes of conduct” for tourists. These are generally aimed at the critical task of managing tourist interactions with local residents, wildlife, and plant communities, and may updated and amended continuously. The goal is to minimize damages to human and wild communities from tourism, and also proactively to raise conservation awareness among visitors.

### E. Build Conservation Ethic and Strengthen Local Institutions

Seek to build a conservation ethic within the community, and do not assume one will automatically emerge with the presence of economic benefits (employment, income) from ecotourism. Define or strengthen local institutions (with widely understood rules and forms of leadership), *in close collaboration with the community*, to govern where and how hunting, agriculture, fishing, extraction, and other productive activities can be carried out in relation to tourism.

## ECOTOURISM PARTNERSHIPS AND CONSERVATION

### *Key Achievements*

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<ul style="list-style-type: none"> <li>• As a community and lodge we are contributing to raising awareness to the public and communities about the importance of conservation and natural resource management.</li> <li>• Participation in the management team for the Madidi National Park</li> <li>• Chalalan helped influence the creation of the Madidi National Park</li> <li>• Chalalan guides help monitor fauna in the region</li> <li>• Managing and sorting waste</li> <li>• Using biodegradable products</li> <li>• Solar panels</li> <li>• Control and monitoring of impacts generated by tourism, maintenance of trails</li> <li>• Control of visitor behavior through written rules and guide instructions</li> </ul>	<ul style="list-style-type: none"> <li>• We help help protect the forests around Kapawi by prohibiting tourists from taking wildlife</li> <li>• We have helped maintain cultural traditions and are helping create a consciousness of biodiversity</li> <li>• Strengthened and built awareness among FINAE about the importance of conservation, which has led to resistance to petroleum exploration.</li> <li>• The community talks about conservation and its connection with the benefits ecotourism brings</li> <li>• The lodge serves as an argument against petroleum exploration</li> <li>• Through FINAE, the Achuar are protecting our territory, strengthening the organization to impede petroleum exploitation in the Pastaza region, which is the greatest threat to forests in the area.</li> <li>• An environmental education program in the community of Kapawi</li> </ul>	<ul style="list-style-type: none"> <li>• 2500 hectares for a reserve, off limits to hunting and farming</li> <li>• Community-driven efforts to protect and manage resources in the oxbow lake, Tres Chimbadas</li> <li>• Provided economic alternative to hunting</li> <li>• Natural resources for tourism protected, at least on paper. Though the rules are understood, not everyone complies with them</li> <li>• New valuation of resources</li> <li>• Maintain a protected area in CNI</li> <li>• Help protect flora and fauna</li> <li>• Collaborate in the protection of endangered species, especially macaws and giant otters.</li> <li>• Help in the protection of habitats</li> <li>• Promote a conservation vision in the community and region</li> <li>• Help diminish environmental contamination by using biodegradable products</li> <li>• Collaborate in the reduction of the rate of deforestation</li> <li>• Create incentives for sustainable activities, like agroforestry</li> </ul>

## ECOTOURISM PARTNERSHIPS AND CONSERVATION

### *Key Challenges*

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<ul style="list-style-type: none"> <li>• Lack of a Management Plan for the community of San Jose</li> <li>• Lack of environmental education in the schools</li> <li>• Lack of professionals preparation (through formal education, advanced degrees, etc.)</li> <li>• More education for conservation, particularly through a school for guides</li> <li>• Respecting and complying with rules</li> <li>• Providing enough economic benefits from ecotourism so that community members can shift out of other extractive activities</li> <li>• Lack of educational programs for the community</li> <li>• Lack of research projects in the area, which would be helpful for monitoring of social and economic impacts of tourism and other economic activities in the area</li> </ul>	<ul style="list-style-type: none"> <li>• Zoning in the hotel's reserve where tourism takes place</li> <li>• Lack of compliance with agreements made between the Achuar and Canodros, in terms of hunting and fishing, within the hotel's reserve.</li> <li>• Kapawi benefits relatively few communities, while other communities have little consciousness or understanding about conservation and are dedicated to small-scale cattle ranching.</li> <li>• Lack of information and awareness-raising about conservation to many Achuar communities which are relatively unconnected to Kapawi</li> <li>• There is a lot of hunting by the Achuar around the hotel</li> <li>• The need to create a comunal reserve in territory near the hotel</li> <li>• There are no research (or monitoring) programs</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of care for principle resources, such as the oxbow lake</li> <li>• Laziness of some community members with regard to protecting some species</li> <li>• Environmental education programs from children, youth, and adults</li> </ul>

## **ECOTOURISM PARTNERSHIPS AND COMMUNITY DEVELOPMENT**

### **Points of Consensus**

#### A. Create a new kind of partnership

##### Community-company-NGO

###### Potential role of NGO:

- Help determine and meet community development goals
- Provide training and capacity-building
- Serve as mediator and facilitator between the community and company
- Make initial investment

###### Potential role of company:

- Assume management and administration of the lodge
- Make initial investment

###### Potential role of community

- Provide human, cultural, and touristic resources

#### ***Reflections from the Trueque***

*"I learned the way in which different cultural groups relate to their respective projects. For example, the Achuar do not have as much empowerment [in the partnership] as do the communities in Peru and Bolivia. In part, this is because of culture. But, it is also related to the structures of the different partnerships. Kapawi represents a federation of many communities. Chalalan and Posada are very community-specific" (AR, 6/16).*

#### B. Purchase and Hire Locally

Hire members of the community to assume all or most of the lodge positions, and provide apprenticeships and training along the way. Make conscious effort to keep earnings local. Build with local materials. As much as possible, stock the lodge with products purchased locally

#### C. Complementary Projects

Any community-based ecotourism product must be supported by a series of satellite projects that complement ecotourism (and do not deplete the natural resources sustaining ecotourism) to help meet community economic needs. Examples include butterfly farms, medicinal plant gardens, handicraft production workshops and apprenticeships, etc.

#### E. Build Pride and Self-Esteem

Self-esteem, and build appreciation for the value of cultural and natural resources in the community.

#### F. Remember the Tourists

Delegates noted that the ecotourism product should always remember to focus on the tourists, as they represent the reason the lodge exists, and will continue to (or not) in future.

## ECOTOURISM PARTNERSHIPS AND COMMUNITY DEVELOPMENT

### *Key Achievements*

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<ul style="list-style-type: none"> <li>• Chalalán and San José has developed professional relationships with government institutions in Bolivia</li> <li>• Chalalán has improved opportunities for education in San José</li> <li>• Chalalán has improved local transportation and access between San José and Rurre</li> <li>• Provided more and better resources for health care</li> <li>• Has slowed the out-migration from San José and helped consolidate the community</li> <li>• Self-determination of the community, both in practice (legally) and in perception</li> <li>• Contributes to overall improvement of quality of life in San José</li> <li>• Chalalán has twenty trained staff positions</li> <li>• Chalalán provides an additional market for various community-produced goods and services, including agricultural products and handicrafts</li> <li>• In connection with Chalalán, San José has been able to improve public services in the community, including telephone, potable water and bathrooms with plumbing, and a medical clinic.</li> </ul>	<ul style="list-style-type: none"> <li>• The communication between the communities near the lodge for operation of local radios, improvement of airstrips, and communal houses</li> <li>• Kapawí has helped FINAE leaders move throughout Achuar territory and keep in closer contact with all of the bases. Also, the transportation has been useful for evacuation of Achuar in case of medical emergencies.</li> <li>• Kapawí has helped maintain, and also renew, pride in Achuar culture</li> <li>• Kapawí has provided market incentives to maintain and improve native arts and handicrafts</li> <li>• Kapawí has generated employment for the Achuar</li> <li>• Kapawí facilitates the movement of members and leaders of Achuar communities in cases of emergency</li> <li>• Outside training in different areas of the hotel, including cooking, housekeeping, maintenance, guiding, and others</li> <li>• Creation of an Ecotourism School in the community of Kapawí, with students from various Achuar communities throughout the region</li> </ul>	<ul style="list-style-type: none"> <li>• Purchase (or receipt through donation) of new goods—such as a secondary school, handicrafts workshop, new river port, etc.</li> <li>• Strategy planning for satellite projects</li> <li>• Increased social and human capital—through training workshops, new experiences, formal education, etc.</li> <li>• Self-determination and independence</li> <li>• Ability to communicate directly with donors, NGOs, and other sources of potential support for development in Infierno</li> <li>• New gender relations, in particular acknowledgement of the abilities and opportunities for women to assume non-traditional roles</li> <li>• Work positions in the lodge</li> <li>• Generation of profits, both directly and indirectly</li> <li>• Greater participation of women, especially in the production of handicrafts</li> <li>• Handicraft projects</li> <li>• Children's lodge (so that children of other native communities in the region can attend secondary school in Infierno, rather than needing to relocate to the urban center of Puerto Maldonado)</li> </ul>

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

<ul style="list-style-type: none"> <li>• Youth are more optimistic about opportunities for the future in San Jose</li> <li>• With income from Chalalan, San Jose has been able to pay the salary of two secondary school teachers</li> <li>• San Jose has used the political leverage and economic benefits from Chalalan to seek legal titling to communal territory</li> <li>• With income from Chalalan, San Jose has transformed the trail from Tumupasa to a dirt road wide enough to be passable with motor vehicles</li> </ul>		<ul style="list-style-type: none"> <li>• Trained community members (staff positions, guides, directors)</li> <li>• Creation of new educational facilities</li> <li>• Infrastructure and equipment</li> <li>• Construction of an improved river port</li> </ul>
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## ECOTOURISM PARTNERSHIPS AND COMMUNITY DEVELOPMENT

### *Key Challenges*

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<ul style="list-style-type: none"> <li>• Lack of professional training and preparation for staff and managers (i.e., through formal education, higher degrees, etc.)</li> <li>• Lack of orientation in how to use resources generated by ecotourism, particularly in strategies for development that will not collide with or contradict conservation and sustainability principles of ecotourism.</li> <li>• Little knowledge about the national laws with regard to indigenous communities</li> <li>• The need to satisfy the expectations of the community</li> <li>• Social differences within the community and staff</li> <li>• Lack of electricity in the community</li> </ul>	<ul style="list-style-type: none"> <li>• Many Achuar communities—those distant from the lodge—have not improved communications, airstrips, and communal meeting houses.</li> <li>• Community development has been hindered because of lack of experience and appropriate local institutions to manage funds</li> <li>• The western economy has eroded the traditional economy. An example is in the sale of chicha. Now, many Achuar are less inclined to work or support each other without pay.</li> <li>• There are many products available for sale in Achuar communities that Kapawi does not buy.</li> <li>• Create a handicraft workshop in nearby communities</li> <li>• Establish contacts with NGOs to assist in community development, especially related to education and health</li> </ul>	<ul style="list-style-type: none"> <li>• Inertia, and complacency with things as they are, and with waiting for others to do the work</li> <li>• Differences and conflicts between community members</li> <li>• Infierno is now perceived as “taken care of” by Posada Amazonas and therefore not a priority for government support for development</li> <li>• Implement a program for nutrition and health</li> <li>• Health insurance for children, expectant mothers, and elders</li> <li>• Invest profits in more comunal projects for variety of long-term benefits</li> <li>• Create more protected areas in communal lands</li> </ul>

**ECOTOURISM PARTNERSHIPS AND LOCAL PARTICIPATION**  
**Points of Consensus**

- A. Decision-making:
- Shared by theme—minimizes risk, but it depends on the topic
  - Meetings: frequent, but with few people. Create an executive “Ecotourism Committee” charged with focusing on tourism and business aspects of community matters.
  - Hire a mediator or communicator
- B. Foster equal participation
- “voice and vote” between the two partners, as well as within the community. This may entail discussing ideas of gender equality, ethnic differences, etc.
- C. Promote self-determination in addition to employment
- D. Engage in intercultural exchanges with other communities engaged in ecotourism
- F. Ensure volunteers and researchers who come to the lodge understand the role of the local community—as full owners and partners, not just “staff”

## ECOTOURISM PARTNERSHIPS AND LOCAL PARTICIPATION

### *Key Achievements*

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<ul style="list-style-type: none"> <li>• Participation of men and women in ecotourism activities</li> <li>• Development and compliance with rules and norms established by the community, for the community, for the zoning and management of ecotourism</li> <li>• San Joseanos gained many new skills and types of knowledge by participating in a series of workshops related to ecotourism and Chalalan</li> <li>• Strengthening the talents of artisans, thanks to the opportunity to travel to other sites to share and learn techniques with other artisans</li> <li>• Visits from the community to Chalalan by children, youth, and elders before the lodge opened to tourists</li> <li>• Visits from students of other communities</li> </ul>	<ul style="list-style-type: none"> <li>• Participation of some Achuar members in the hotel, allowing them to be in contact with more communities</li> <li>• It helps slow out-migration</li> <li>• The Kapawi hotel is considered by the community as “just one more community” that participates in all of the political and social events of the Achuar.</li> <li>• Kapawi buys local products, including handicrafts, building materials, and food.</li> <li>• Kapawi visits Achuar families in various nearby communities, and tourists buy handicrafts during the visits</li> <li>• Kapawi organizes communal “mingas” for various hotel tasks</li> </ul>	<ul style="list-style-type: none"> <li>• Generates attitudes, ideas and policies</li> <li>• Legitimacy and wisdom in decision-making</li> <li>• The community supplies resources (natural resources, people, etc.)</li> <li>• We assume the benefits outweigh the costs</li> <li>• Connection between the project and the community (Ecotourism Committee, employment, training, etc.)</li> <li>• Greater gender equality</li> <li>• Equal participation between CNI and RFE, in spirit and practice</li> <li>• Broad local participation of members of CNI as owners, administrators, and employees of APA</li> <li>• Members of Infierno have voice and vote in all matters concerning APA</li> <li>• Development of local initiatives, signifying greater self-determination</li> <li>• Greater self-esteem</li> <li>• Social capital, as reflected in greater capacity to develop and follow through on ideas by and for the community</li> </ul>

## ECOTOURISM PARTNERSHIPS AND LOCAL PARTICIPATION

### *Key Challenges*

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<ul style="list-style-type: none"> <li>• Increase women's participation in decision-making</li> <li>• Lacking a training facility in the workshop</li> <li>• Need to start promoting more engagement of volunteers</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of the participation among Achuar women, because of strictly and narrowly defined gender roles among the Achuar</li> <li>• Include the Achuar in the promotional fairs and events for Kapawi, as this is important for preparing them to assume executive roles in marketing.</li> <li>• Motivation for the rest of FINAE's member communities so that they feel like owners of their project, Kapawi</li> <li>• Create an Achuar committee to assume responsibility for motivating more communities to get involved</li> </ul>	<ul style="list-style-type: none"> <li>• Concentration on ecotourism as a solution</li> <li>• Communal decision-making raises costs because it just takes more time.</li> <li>• Risk</li> <li>• Many community members feel inferior and lack confidence, especially relative to their company partners, RFE</li> <li>• Some staff in the lodge, particularly guides from RFE, are not well integrated with the community partnership concept of APA or with the community</li> </ul>

## ECOTOURISM PARTNERSHIPS AND PROFITS

### Consensus

#### **Build Partnerships based on Profits not Rents**

Design the partnership so that both sides are earning profits. This “joint venture model is preferable to a concession with a fixed rent. Both partners should share in the ups and downs, the risks and windfalls of the company as this builds a sense of ownership on both sides.

#### **Create a “Lodge Academy” for learning on the job and apprenticeships**

Rotating personnel is critical for ensuring broad community participation in ecotourism over time. Yet, the continual turnover and need for new training hinders profits. An idea is to train and maintain “area supervisors” who can oversee certain aspects of lodge operation and are also charged with training new staff members from the community. Another idea is to organize exchanges with other lodges and encourage community members to serve as trainers. For highly-skilled guiding positions, it may make sense to have a mixed cadre including indigenous people, biologists, hospitality school graduates, etc. Social diversity can help build profits too.

#### **Go Beyond Image**

It is not enough to say an ecotourism lodge is “community-based” simply to attract tourists. Companies must know how to connect tourism with conservation and development, and not just rely on its good image. Doing more than labeling anyway can lead to international awards and added recognition and prestige. All of these help secure a market niche.

#### **Share Business Plan and Seek Additional Support**

Have a joint financial proposal, and assume financial responsibility in partnership. Also have a joint business plan, and define reinvestment policies agreeable to both. As ecotourism entails more than making a profit, other sources of support for conservation and development efforts may come from NGOs, bilateral organizations & banks, and foundations, either in the form of loans or donations. Different types of support may be better suited to different needs.

<b>Loans (faster return)</b>	<b>Donations (long-term)</b>
Infrastructure and equipment	Training, education, and capacity-building
Logistics	Handicraft production
Research and Development	Resource management and conservation
Marketing	Reforestation

#### **Maintain Good Relations with the Government**

When communities engage in tourism, the government may have a tendency to provide less support than before, assuming the community is already receiving adequate support through profits. A communicator, intermediary, or ombudsperson can help with “public relations” on behalf of the community.

## ECOTOURISM PARTNERSHIPS AND PROFITS

### *Key Achievements*

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<ul style="list-style-type: none"> <li>• Contributes to the development of other projects, like handicrafts and agroforestry</li> <li>• Creates incentive to continue with more interest in the development of ecotourism</li> <li>• Replication of ecotourism in other areas</li> <li>• Acquired an office in Rurre for the company</li> <li>• Distribution of profits throughout the community</li> <li>• Various kinds of equipment (transportation, for the office)</li> <li>• Investment in recognition of the TCO</li> <li>• Reinvestment in the lodge</li> </ul>	<ul style="list-style-type: none"> <li>• FINAE and Canodros together have gained prestige at the national and international levels FINAE through economic income of the rent has gained political strength and clout in the region</li> <li>• Kapawi is the only entrepreneurial project in FINAE</li> <li>• Conceptual: recognition, image, fame, positioning of Kapawi in the market</li> </ul>	<ul style="list-style-type: none"> <li>• Image</li> <li>• Everyone “wears the shirt” or is proud to be part of the team</li> <li>• Diversity—creates both more efficiency and quality because there is a mix of talents (and weaknesses)</li> <li>• Financing from a variety of sources, including foundations and bilateral organizations</li> <li>• Differentiation and definition of niche in the market</li> <li>• Minimize costs by using Puerto Nuevo, the new river port in CNI</li> <li>• Shared costs</li> <li>• Handicrafts</li> <li>• Bar</li> </ul>

**ECOTOURISM PARTNERSHIPS AND PROFITS**  
*Key Challenges*

<i>CHALALAN</i>	<i>KAPAWI</i>	<i>POSADA AMAZONAS</i>
<ul style="list-style-type: none"> <li>• Lack of promotion and marketing at all levels</li> <li>• Need to improve infrastructure</li> <li>• Create an office in La Paz</li> <li>• Lack of satisfaction in distribution of benefits</li> </ul>	<ul style="list-style-type: none"> <li>• The majority of community Associations neither perceive or receive much in the way of economic benefits from Kapawi.</li> <li>• Canodros has yet to earn a return on its initial financial investment</li> <li>• Canodros has not recuperated its initial investment, and Kapawi is not yet turning profits</li> </ul>	<ul style="list-style-type: none"> <li>• Investment in training and capacity-building</li> <li>• Rotation of personnel</li> <li>• Local participation</li> <li>• Rotation of staff</li> <li>• Fuels and motors—need to change to solar energy and biogas</li> <li>• Infrastructure for the lodge remains to be completed</li> </ul>

#### 4.4 Sharing Economic Resources

Questions for workshop discussion under this theme:

- ★ What economic resources do we have, and what taxes do we pay?
- ★ What are we doing to increase economic benefits?
- ★ How do we make decisions about how to distribute economic resources?
- ★ How do we distribute the economic resources?
- ★ What are community members doing with the ecotourism earnings they receive?
- ★ What should they be doing with the ecotourism earnings?
- ★ Should the community be advised about what to do with their economic resources?
- ★ What would we do if one year we did not receive economic resources from ecotourism?

**What economic resources do we have, and what taxes do we pay?**

### **KAPAWI**

Resources include income from the sale of goods and services at the hotel. Kapawi also functions as a platform for launching other projects that contribute resources, particularly in collaboration with the Pachamama Foundation, an indigenous rights NGO in the U.S. that supports FINAE. Pachamama administers Aerotsentsak, the airline company operated and eventually to be owned by FINAE. (The Achuar are very isolated and all transport throughout the territory depends on small planes.) The Pachamama Foundation also supports communication among the Achuar, public health projects, and capacity-building for FINAE

<b>Income from fee for entrance to Achuar territory</b>	
Average 1,800 tourists/year X \$10/tourist	\$18,000/year
Monthly rent: \$3,400	\$40,000/year
Estimated total annual income to Achuar from Kapawi	\$58,000

Taxes:

- National tax: 12% of bar and boutique sales
- Tax on rent: 8%
- Each employee pays Ecuadorian social security as well
- A small tax is paid to Ecotourism Association of Ecuador (ASEC)

### **POSADA AMAZONAS**

Resources include the following:

- Profits from Posada Amazonas and from the bar
- Communal titled territory (9,558 hectares), with a communal reserve for protecting flora, fauna and cultural traditions. The reserve is in a process of being recognized officially by the state of Peru.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

- Lodge infrastructure, and human capital (of the company and the community)
- Awards and recognition: including one from the United Nations Development Program (UNDP) and donations from foundation, including MacArthur, and tourists.
- Knowledge and position in the market
- Loans

Taxes:

- Tax on the rent: 5%, instead of the normal 30%, because the lodge is in a native Amazonian community, by Peruvian law
- A health tax

## CHALALAN

Our resources include company shares, plus profits from tour packages, bar sales, handicrafts, and t-shirts. We also have financial resources and the image of our product, Chalalan.

San José:

OTB (Communal org.)	50% (includes families who didn't invest in Chalalan)
Shareholders	48.5% (74 families who represent most of the community)
Church	1.5%

Taxes:

Aggregated Sales Tax (IVA):	13% sales tax (advantage: with purchases, can recuperate)
Tax on transactions (I.T.)	3% sales tax (monthly transactions)
Sales tax (I.V.)	25% tax on earnings (annual; with earnings, can discount with all purchases.

We are supporting the government, even though the government does not support us. But also, the state has placed certain rules in favor of tourism. These include freeing us from taxes, through the Tourism Law. Currently, we are accommodating a model that does not serve the community. The state has to enact a special law for community enterprises.

### **CHALALAN VOICES**

*It was a process of raising consciousness, and there was a lot of disbelief and distrust. They wanted to see the results to decide if they wanted to join. Chalalan was created by only 20 shareholders, and we said that was going to create conflict, and we have gone from just 20 to 74. But it has taken time.*

*Those who have not been involved must regret it now, but they themselves didn't believe in*

*Chalalan. But these people can apply to work in any position in the lodge. We are giving opportunities for everyone to work. You have to see that the 74 families represent about 95% of the community. Those who are not involved are mostly elders who do not have children. It's not like we closed the door on people.*

*The motto of the Chalalan project was and is: "Everything with sweat, nothing with money."*

## **What are we doing to increase economic benefits?**

### **KAPAWI**

- Marketing, travel fairs, and promotions to increase numbers of excursions and tourists
- Offering new services, such as laundry, and a health spa

Our goal in the future is to plan new projects together between the company and community, hopefully with the support of an NGO, to train employees, and hire a mediator and communicator between the two partners.

### **POSADA AMAZONAS**

- Improving infrastructure, including bridges, new lighting, hot water. These additions will allow us to charge more.
- Improving the quality of service, through training of human resources. This improvement will also allow us to charge more.
- Conserving and managing resources, such as by consolidating our legal tenure over Lake Tres Chimbadas, which will allow us to guard it from outsiders who want to use it. Also, we have a Harpy Eagle project.
- Community participation as capital partner. Some community profits are used for co-financing new initiatives.
- Dynamism in the Ecotourism Committee: better decisions, less spending
- Financing proposals for infrastructure, training, and community enterprises, including a grant from the World Bank for handicraft production
- Participation in ecotourism award competitions
- Finally, by keeping things simple.

### **CHALALAN**

Presently, we are strengthening marketing by attending national and international travel fairs, or we are participating through bigger operators who attend the fairs. We are following up with travel agencies, giving presentations about how we are changing and improving the lodge.

In the future, we have various strategies planned, including: diversifying our product to appeal to other market segments, promoting scientific investigations, seeking technical support from consultants, diversifying and expanding our handicraft production, creating food and medicinal products, developing complementary projects, such as small livestock production and fish ponds.

## How do we make decisions about distributing economic benefits?

### KAPAWI

We work through an agreement established by community assembly. All operation matters are handled by Canodros.

### POSADA AMAZONAS

- Profits from the company, by agreement, are divided 60% to the community and 40% to the company, 60% profits are managed by the community
- Donations and awards are managed by the community. Through community assemblies and in some cases by the Ecotourism Committee (10 persons) with help from the Project Coordinator (intermediary between the company and community).
- Donations to Posada Amazonas are managed by Rainforest Expeditions and Infierno, principally through the Ecotourism Committee.
- Resources managed by joint decisions are the following:
  - Donations and financing for the company are defined by Rainforest Expeditions and corrected and concretized by the Ecotourism Committee
  - All loans and financing has approval by the community and the funds are managed by Rainforest Expeditions

### CHALALAN

We conduct financial analysis first, and then we seek proposals and prioritizations from the leaders, then the proposals go to the directorate, and then finally the revised proposal goes to the board of shareholders.

#### Profits:

- 50% shareholder families with dividends
- 50% OTB communal organization

A financial audit is given to the board each year and decisions are made about reinvestment and dividends.

#### Who decides?

- Decisions on operational resources valued at less than \$2,000 are handled by the company manager
- Decisions on investments in the company greater than \$2,000 are handled by the directorate and the board
- Decisions about profits are made by shareholders and the OTB
- There is a legal reserve of 5%

## How do we distribute resources?

### KAPAWI

#### Distribution of Rent from Kapawi to Achuar

Percentage	Annual Income	Recipient(s)
40%	US\$ 16,320	One community: Kapawi (10 Quichua & 13 Achuar families)
40%	US\$ 16,320	One association: Amunday Association of six communities
5%	US\$ 2,040	FINAE for administrative costs
15%	US\$ 7,120	Shared among 53 Achuar communities

FINAE has territory of 7,000 square kilometers. It is a reserve the Achuar are able to live and do as they wish, but they are not able to sell it. FINAE is the organization that represents 58 communities (averaging 70 persons each) across two provinces. Each community belongs to one of eight associations. Kapawi is a community within the Association Amunday. As the nearest community to the lodge Kapawi, the *community* of Kapawi receives 40% of the monthly rent from the lodge, and that is shared among 23 families. Another 40% is distributed to the other five communities in the Amunday Association.

#### Achuar tourist fee:

- Capacity-building for FINAE
- Production of radio program “Radio de la FINAE: Voice of the Achuar”
- Transportation of FINAE leaders throughout the 7,000 ha. Achuar territory
- Administrative costs in Puyo, headquarters town for FINAE
- Emergency medical costs

In addition to the rent Canodros pays monthly, there is a fee of \$10 per tourists. FINAE uses this money for various organizational needs, including keeping an office in the town of Macas, paying administrative costs for office in the city of Puyo (where the FINAE headquarters is located), producing a radio program, “Voice of the Achuar,” which plays news and local music, and promotes pride in Achuar culture), and transporting FINAE leaders among Achuar communities throughout the indigenous 7,000 km.2 territory, and for emergency medical expenses.

**KAPAWI VOICES**

Rep. Achuar: I have worked during six years and I know how we have invested the funds from Canodros. Why have we allowed the funds to be spent without accounts? 40% for the community of Kapawi and 40% for the Amunday Association. The community had its president and council, and we gave them the money. One man in the community easily convinced the others to give him authorization to spend the money. They trusted him because he came with a stamp from the community, but really that money was not invested as it should have been. As a leader of FINAE, I could not make the decision to not give him the money. I hoped that the community would be able to stop him, but that were not able to control the problem for four years. We hope that now in this year we can stop him.

Rep. Canodros: In 1997, there was a census that determined that a average annual income for an Achuar was \$370. The monthly rent from Canodros that year was \$2,600. Forty percent of that, or \$1,040 each month, was divided among just 27 families. That equals \$462 per family per year, or a 124% increase in their annual income.

Rep. Achuar: Yes, but only once was \$400 given to each family.

Rep. Canodros: But that's because one family took all the money from other years.

Rep. Achuar: When we distributed money, that was the first time. The people did not want to work in the lodge, and they threatened to hunt around the area. We had to give them money so they would feel better.

Rep. Achuar: How do we feel about receiving this rent? We don't perceive it as a gift, rather it is money delivered by an agreement we have with a company who has been working with us for many years. We feel this money is the fruit of our union with that company. And also I am going to tell you a little. The first contact I have with FINAE, I had to accept under agreement with the company, and the monthly funds began to come to FINAE. That alliance has strengthened us so that FINAE can maintain the structure we have. We have found another alliance with a man who came as tourist and he has had the good will to help the Achuar and he formed a foundation in the United States, and he supports projects that we are working on. It is a strength the alliance with Canodros gives.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

## POSADA AMAZONAS

Awards, such as the Equator Initiative that Posada Amazonas was awarded in 2002 for \$30,000, go to Infierno. The funds are used for training, new technology, education, consultants (for development of new development projects), and travel. In 2003, delegates from Infierno traveled to South Africa and Ecuador.

Donations, such as the \$50,000 grant Posada Amazonas received from the MacArthur Foundation, are managed by the Ecotourism Committee in collaboration with the Project Coordinator. Grants are used to support training for guides and staff in the lodge, and to cover salaries of the Project Coordinator and two Community Communicators.

Financing is managed jointly by the Ecotourism Committee and Rainforest Expeditions. The money is used to enhance tourist infrastructure, including new lighting, bridges, hot water, and laundry services at the lodge.

Profits, after three years of operation, in 2001, the partnership achieved a positive return on its investment after paying off the original loan from the Peru-Canada Bilateral Fund. Sixty percent of the profits were distributed to Infierno, and 40% to Rainforest Expeditions.

## CHALALAN

50% of the pie belongs to the communal organization, the OTB. Then, 74 families take 48.5%, and then 1.5% goes to the church.

The community is represented by the OTB.

What does the shareholder do and what does the OTB do? The OTB was established to attend to communal interests before the municipalities. The OTB comprises all of the members of the community, and it is a unique organization in the community that represents everyone and holds 50% of the shares in the company. The OTB supports education, health, sports, and other matters according to priority. Logically, in this moment, with certainty, the biggest part goes to health and mainly to the women. A big portion of the income is aimed at consolidating San Jose's legal territory. Luckily, our community has the funds to pay for this effort.

The OTB supports projects that are for the community. They are doing projects, such as the sale of foods, chicken production and fish ponds, all projects that can provide extra income to families in San Jose.

The work of the OTB must be connected to the company. San Jose and Chalalan is really one, and the decisions for both have to be made in union.

Gross income from Chalalan distributed as follows:

- Operating costs, 40-60%, including salaries and marketing
- Salaries

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

- Legal reserves = 5%
- Taxes = 15%
- Profits = 6.25%
- Reinvestment = 12.5%

It is a law for private companies that we have to pay the state. It is an amount that we pay directly to the state and another percentage to the legal reserve. That 5% is the amount we set aside as contingency in case the company hits a difficult times. That amount we leave in the box to spend. After there are operational costs (transport, salaries, maintenance). Then there is the small profit margin. We see the results in the audit, an external auditor comes to say if we are good or bad, a profit of 7%, and that reflects that we've done something for the OTB. How does the community benefits? A part goes directly to the families and another part to the OTB.

FIRST PROFITS: \$15,000

50% Community Fund

50% Divided among 74 families  
(\$105 per household)

### Who is a shareholder?

As the dialogue reflected in the box above, the delegates from Kapawi, Chalalan, and Posada Amazonas engaged in debate about the topic of what defines a shareholder and who has a right to earn benefits from the ecotourism companies.

They reached consensus on three points:

1. to be a shareholder in the company, one must first be a member of the community
2. a shareholder must contribute in some way to the company, either through labor, materials, cash, or shares;
3. and all of the other rules regarding shareholders will vary by community, depending on local customs for organization and decision-making.

#### *VOICES FROM CHALALAN*

*You have to sacrifice to be an shareholder. I am just a community member, I get my yearly dividend, but that means I don't have to worry about anything. When we had just twenty partners, we saw that that was a monopoly, and then after putting in more families, now the shareholders represent more than 90% of the community. If you don't invest in something, you don't take care of it. If no one is owner, no one cares. You have to sacrifice to have something.*

### **WORKSHOP DIALOGUE**

*Rep. Rainforest Expeditions: The criteria that defines who is a shareholder has to be specified in the contract. In Chalalan: whoever works is a shareholder. But they have contributed their territory, and everyone is in some way an owner of that land. Everyone is contributing something to the project in that way.*

*Rep. Infierno: For sure to be a shareholder you have to be a member of the community and participate in the project and in faenas and give some capital. But each person is contributing land to the project as well. A percentage of the benefits should go to people just for being member of the community.*

*Rep. Conservación Internacional: Just by being a member of the community, one has contributed nothing. The benefits should be earned. People should fight for the benefits. Being a community member is a requirement, but the contribution and interest are important.*

*Rep. Conservación Internacional: In the case of Chalalan, the people who participated have 50% to distribute and 50% that goes to the OTB for community-wide projects.*

*Rep. Infierno: It doesn't make sense for community members to receive benefits simply for being community members. In Infierno, we are doing that, but we have to analyze the situation better.*

*Rep. Chalalan: Speaking of this, we are trying to implement some rules. To participate, you have to have been born in the community and have a home there as well. We cannot turn away some families. There are families who have entered the*

*community, and they are now San Joseanos . . . now what we have to do is measure the participation, with faenas. But in one way or another, a shareholder has to contribute. There are others who benefit from the OTB, and they benefit from shares, and there they have a double benefit. What we know is that we cannot marginalize people. At the end of last year, we had Christmas gifts, and we demanded that they go to everyone, the OTB a part, and there were people who opposed saying that the gifts should go only to partners, but everyone has a right, because there is share of territory, a right from living in the community.*

*Rep. Rainforest Expeditions: I'm hearing the community members say this, so OK. They invest in social works, and on the other hand, they are partners that invested through labor and materials or whatever. Everyone who invests should receive the same or different amounts?*

*Rep. Chalalan: That will be the second step in Chalalan. We are going to differentiate shares, but later.*

*Rep. Conservación Internacional: It self-regulates, because each community has its own history and their own strategies for resolving these matters.*

*Rep. Rainforest Expeditions: But it's important to establish in the contract.*

*Rep. Conservación Internacional: I don't understand how a partner can reinvest in the company, whether or not s/he has shares.*

*Rep. Rainforest Expeditions: You have to establish the rules of capital. You'll have to put more money in in the future, and you have to define how to do that.*

## What is the community doing with the profits they receive?

### KAPAWI

#### The community of Kapawi:

- Maintenance of the 800-meter airstrip through manual labor (“work that never ends”)
- Health: In case of emergency, such as a bad case of malaria, funds are offered, 50% as a loan, and 50% as donation.
- Education: \$80 per month. They have a School of Ecotourism in the community of Kapawi, 50 minutes by canoe from the lodge. They use funds to buy books, pay teachers, and transportation.

#### 40% Amunday Association:

- US\$150 monthly to two communities
- US\$100 monthly to three communities
- US\$30 for education in the School of Education

It is unclear how the \$18,000 from the \$10/person tourist fees are used. Accounts are not kept, and Canodros makes it a policy not to interfere in how the Achuar choose to spend their earnings.

### POSADA AMAZONAS

Half of the profits were used by the Ese'ejá, and the other 50% went to the Riberenhos. The money was distributed to active individual members of the community over 18 years of age. In 2001, the first profit earnings were \$15,000, 20% of which was spent on education. In addition, the Ese'ejá contributed \$500 to a new school, and the Riberenhos gave \$300. Profits from the bar are not distributed throughout the community, but rather held in an emergency fund. 2002, the profits were \$20,000. They divided fifty-fifty as in the previous year, but they did not invest in communal needs because they won the Equator Initiative Award from the UNDP (\$30,000).

Two issues of conflict were that some community members did not want to distribute profits to the workers in Posada Amazonas, as the concern was that they were already earning salaries from the lodge. Also many community members without children did not agree to invest in a school.

### CHALALAN

Profits are divided three ways:

- 50% are shareholders in the OTB: 47,000 Bolivianos annually divided by 74 persons = 641 Bs/person.
- Support for education
- Community works, including teacher salaries, securing land title, loans for medical emergencies, road maintenance and improvement, gasoline, fiestas, welcoming receptions, legal help, and travel.

### **WORKSHOP DIALOGUE**

*Rep. Infierno: The people who do not contribute to the company also receive profits. Everyone receives the same amount of money.*

*Rep. Posada Amazonas: They have the community registry, and they keep track of whether or not people comply with their duties as members of the community—such as participating in faenas and attending meetings. Active members are men (or single female heads of household) over the age of 18. Also, the members who work at the lodge and receive salaries also receive their share of communal profits.*

*Rep. Conservación Internacional: In a way, there is some comparison between Kapawi and Posada on this matter. If someone in Infierno does not contribute to the project, they receive profits anyway. In Kapawi, a person who does not account for how communal profits are used, still receives profits.*

*Rep. Infierno: It is a suggestion we make take in the future, but for now we have an agreement that everyone receives profits, whether or not they collaborate or even agree with Posada.*

*Rep. Posada Amazonas: There is a kind of accounting that the Ese'jeja and riberenhos do if and when people fail to attend meetings or faenas. But when you're talking about a capitalist system, you cannot escape the problem of free-riders. If you're in a community, and you have a park in the middle, and everyone is going to want to keep the park pretty. If 39 families live there, and three of them do not want to help maintain the park, just the same they are going to be able to enjoy the park. It's difficult to escape that situation. Under some rules, they are trying to define who is contributing more and who is contributing less.*

*Rep. Rainforest Expeditions: This problem has to do with the history of the project as well. The money was given as a donation to support the investment of the community and its members. They are investment partners because they contributed their money. And if they do not want to work, they are shareholders nonetheless, and they have a right to receive their portion of profits because they live in Infierno. They invested the money that Peru-Canada gave to them. That is the case of the OTB in the Chalalan case as well.*

*Rep. Conservación Internacional: It's fine as a model, but the communities have to learn about efficiency, or they will fall into a cycle of receiving without contributing.*

## **What should be done with profits?**

### **KAPAWI**

The Kapawi delegates said profits from ecotourism should be used for health (i.e., better sanitation, potable water, more medical posts), education (i.e., training for teachers, investment in the Ecotourism School), microenterprise development, and diversification of agricultural production (“to provide a more balanced diet for our children”).

### **POSADA AMAZONAS**

At the household level, the goal is to use profits to help improve quality of life, such as by making better homes, acquiring more amenities for the family, etc. At the community level, profits should be used for agreed upon projects, such as potable water, planning, electrification, education, health, and infrastructure. Also at the community level, a priority is to use profits to help consolidate and secure native titled land. Finally, a third goal for communal profits is to invest in alternative and complementary development projects.

### **CHALALAN**

Support education, reinvest in complementary (or satellite) projects, such as agriculture, fishing, handicrafts, and research, electricity, securing land title, reinvest in lodge infrastructure and equipment, social works, including improving the communal meeting house and the road, training, health insurance, creating new tourist attractions, and park guards.

## **Should the community receive advice about how to use economic benefits?**

### **KAPAWI**

Yes, definitely! But the advice should come not from the company, Canodros, but rather through a third party, either a individual mediator or an NGO that is relatively neutral. It would not be ethical for Canodros to say what the Achuar should do with their earnings. The fact that Canodros does not have access to knowing what FINAE is doing with the money means it was possible for one person to take advantage of the earnings and form cooperatives without keeping records or accounts. Because of the poor use of funds (40% for the community of Kapawi), and because of people who took advantage of the Achuar trust, good faith and naiveté, there is money from four years, and no one knows how or on what it was spent.

### **POSADA AMAZONAS**

Profits going to the company, advice for reinvesting in the lodge, such as to build a fifth tourist house. For profits going to the community, it would be feasible to have some consulting and business recommendation to invest communal profits. The community always has the option of listing to whatever institution or person with good ideas for investment.

## CHALALAN

More exchange projects (such as the Trueque) are helpful. Also the company itself should help the community decide how to use economic resources coming from Chalalan. Perhaps other NGOs or companies could offer advice on priority setting and creating investment plans.

### **WORKSHOP DIALOGUE**

*Rep. Canodros: What we want is a social actor who works as intermediary to help us with the process of transfer ownership, for communication, to gather needs and interests of both sides and report back. This actor could be an NGO that simply helps strengthen the partnership to facilitate the decisions of what to do with the money.*

*Rep. Conservación Internacional: The role of the NGO is to give advice. The company helps guarantee the efficient use of resources. The NGO offers advantages of being able to attract and channel more resources, in the form of funds, experts, projects, networks, and ideas.*

*Rep. Canodros: The role of the NGO would not be to manage the resources. We already had an earlier experience with that. In indigenous organizations in Ecuador, there were many cases of bad management of funds. And FINAE is different. It's recognized as one of the clearest, most transparent indigenous federations in the Amazon, and that is, in part, thanks to the Pachamama Foundation that has put in place a system for managing funds. But that does not yet cover different levels, because there are so many communities. There could be a foundation, or an independent person, that orients the Achuar in what would be the principal needs—to buy a small plane or sanitary system or whatever—but with a clear system for accounting.*

**What would we do if there were a year in which we did not receive economic benefits?**

## KAPAWI

The Federation, FINAE, would lose its organizational strength and economic stability. The Achuar would need to make up for the loss with funds with support from other projects. The partners, Canodros and FINAE, would need to work together to agree on what to do.

Canodros is giving a certain amount of money to the Achuar each month, independent of the number of tourist who arrive to Kapawi. If we were working with an intermediary, we could say, 'You know what, this year, we are going to receive only 500 tourists, and we are not going to be able to pay the same amount.' What would FINAE say? But with an intermediary, placed with the helped of an NGO, this situation could be managed.

The decision is based only on the leaders but rather in many communities that don't know much about the Kapawi project. There are basically two solutions to the problem: 1) hire an intermediary, or 2) redraw the terms of the partnership.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

## **POSADA AMAZONAS**

We would close the lodge if we did not have a contingency plan (until now we have distributed all profits because of community demands for concrete results from the project). Rainforest Expeditions' contingency plan is to lower administrative and managerial costs. Infierno should establish a system of contingency to help the company survive. The possibilities include organizing communal faenas for infrastructure building and maintenance, Ecotourism Committee members working at no pay temporarily, providing in-kind support, such as food, to lodge staff, lowering salaries, working for credit. The last and most difficult option would be to lay off staff and personnel.

## **CHALALAN**

We would reduce personnel, sell some shares to raise capital, diversify and promote Chalalan more at a national level (at least to cover costs). A key concern would be ensuring the quality of the product is not compromised.

## **Sharing Economic Resources Consensus**

### **Defining Partners and Plans**

Define clearly partners and shareholders in the company. Within communities, this entails identifying what members contribute or invest in the company, such as land, labor, of land, work, materials or some other form of capital.

Have a structure clearly defined for distributing profits. Consider how much should go to the community, how much to reinvestment in the lodge, how much to shareholders, how much as a part of contingency plan, and how much for a common fund. Chalalan's model of distributing 50% to shareholders and the other 50% a communal fund for social works is a good example. For use of common funds, have a plan for identifying priority needs and wants.

### **Increasing Economic Resources**

The search for financing and loans should be a joint effort between the ecotourism partners. Funds may be sought through:

- Donations (including from tourists)—generally, there are two types: for research and projects focused either on flora, fauna, and conservation, or for community development
- Loans
- Awards
- Marketing, and seeking new market niches
- Adding of new services
- Alternative development projects complementary to ecotourism (i.e., handicrafts, tradicional medicine, botanical gardens, etc.)
- Certification of the product—valid and reliable parameters for certification do not yet exist in ecotourism, but the some companies are nevertheless rewarded for social and enviornmental responsibility because they win various types of ecotourism, conservation, and development words. This is a de facto form of certification that adds value to the product
- Training—better staff, better service
- Reinvestment of profits
- Optimizing resources
- Projects aimed at earning donations for conservation, such as “Adopt a Macaw Nest”

### **Distributing Economic Resources**

- Working with just one community (rather than 58, as in the case of Kapawi) facilitates the just and efficient distribution of benefits
- Money should be distributed according to profits, and not in relations to fixed rent.
- Donations and loans for investment in services and infrastructure should follow both an investment plan and a set of needs defined by the Community

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

- Define who can be shareholders as: a) those who invest in the company in some way, either through labor, materials, money, or shares, b) those who are active members of the community
- Define rules and guidelines for reinvestment

### **Consensus on Increasing and Distributing Resources**

- Have a business plan, an investment plan, and a consensus statement of Community needs and requirements
- Community development projects not directly connected to tourism are important to foster as a way to help minimize economic and subsistence risk. Complementary projects can help alleviate pressure on company partners to meet all training and economic needs of the community.
- Invite third-party audits

### **Any plan for sharing economic benefits from ecotourism should include the following,:**

- a business plan, with an annual budget
- a contingency plan
- a plan for meeting community needs and priorities

These should be clearly defined in the initial partnership agreement.

### **Proposed Categories for the Distribution of Resources:**

%	<b>company</b> -fund for reinvestment and unforeseen costs -professional development
%	<b>contingency fund</b>
%	<b>community development</b> joint fund for health, education, sports and recreation
%	<b>direct beneficiaries</b> “shareholders” in the Community
%	<b>community fund</b> for low-interest loans for medical emergencies or microenterprise development

#### 4.5 Building Local Capacity (for Transfer or Continued Partnership)

The goal of building local capacity is an implicit if not primary goal of many community-based ecotourism partnerships. For the three participant lodges in the Trueque, the question of how to build local capacity and eventually transfer ownership and operation of their respective ecolodges entirely to the communities was of special interest and concern. An underlying premise of three ecotourism partnerships is that private companies and NGOs can pair up with communities to bring the resources in marketing, business, and administration together with the social and ecological capital of communities make a joint ecotourism operation viable. But the long term goal for many ecotourism partnerships is eventually to pass ownership and management entirely to communities after some specified period of time. The implication is that throughout the period of partnership, companies and NGOs are charged with the task training and preparing community partners to assume full control of the shared operation.

*KAPAWI VOICES*

*"After 2011, Canodros will leave and FINAE will take charge of the project, or it can renew the contract with Canodros and we will stay to share profits."*

When we brought the delegates from Posada, Chalalan, and Kapawi together to discuss the concept of "the transfer," or the idea of "building local capacity," we asked them to answer five overarching questions:

- ★ Do we have a process in place for the transfer? What is it?
- ★ What difficulties have we faced and what were our solutions?
- ★ What are our concerns for the future?
- ★ How will we know when we're ready?
- ★ What recommendations do we have for a successful transfer?

The lodges were in different stages of transfer, and clearly had a lot to learn from each other. Chalalan was held up by many as the model, for they achieved full autonomy from their partner, Conservation International, in 2000.

**Perspectives on the Concept of Transfer:**

Kapawi: It is a gradual process that allows the partial or total delivery of the necessary elements, including abilities, skills, and knowledge, for the proper functioning of the business. It is to pass work from one to the other.

Posada Amazonas: For us, the concept represents a process which, through time, defines the better management of the project.

Chalalan: "Transfer" is the process of legally and technically appropriating an ecotourism project from one institution to another.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

**Do we have a process in place for the transfer? What is it?**

## KAPAWI

No, we're in the clouds . . .

## POSADA AMAZONAS

Yes, one that follows various phases:

- 1) Train community members in lodge staff positions, including housekeeping, dining service, cooking, guiding, boat driving, lodge maintenance
- 2) Have trained community members in each positions who are able to train others
- 3) Train community members in upper echelon positions, such as accounting, administration, operations, and logistics
- 4) Training in executive positions, including marketing and management
- 5) Define ways of working together in the future, in year 20 and beyond

All of these processes are steps. We are in between steps 3 and 4 now. This is a challenging position for the company, sharing as much as possible with the Infierno's Ecotourism Committee (or Comite de Control). In sum, we vote for the concept of "maturation" rather than "transfer," but we concede that we are in a state of adolescence right now.

### ***POSADA AMAZONAS VOICES***

*Currently, what the community [Infierno] thinks about the transfer is that they have to receive 100% of the profits, control 100% of the decision-making, and disconnect from its partner [Rainforest Expeditions].*

*With the passage of time, however, the community is starting to think more like a company . . .*

*For the company, meaning Posada Amazonas, not Rainforest Expeditions, the process is the following: each partner should assume specific responsibilities, each partner should recognize the other's abilities, the community should assume most of the company positions without sacrificing the quality of the ecotourism project. This scenario does not necessarily represent a rupture in the relationship between the company and community. Therefore, the question to ask is whether "transfer" is the appropriate concept.*

## CHALALAN

“Transfer” is a process of legal and technical appropriation of one institution to another. But before the transfer, from the beginning there has been a process of transferring knowledge, skills, even before building Chalalan. The process has taken five years in this order: knowledge, skills, hierarchy (we take into account that there is a level at which the company is organized, both for management and operations), decision-making, infrastructure and operations, transfer of title (once each person has something to show s/he is a shareholder).

### Company formation

Staff training

Decision making and administration

### Legal Process

- a. Analysis of earlier model (20 partners, afterward we decided it wasn't fair to have just some people involved in community enterprise)
- b. Signing of agreement between Conservation International (CI) and San Jose in October 1999.
- c. Creation of the model: community stock company (50% to the “OTB” or Territorial Organization of Bases (a community organization), 50% individual shareholders)
- d. Establishment of the company (shares: 99.9% CI, 0.05% OTB, 0.05% Church)
- e. Establishment of the first directorate (July 2000)
- f. First transfer of 50% to the OTB (Feb. 2001)
- g. Second transfer to families (March 2002) CI no longer has any shares.

### *THE CHALALAN EXAMPLE*

*The members of the community assumed full control of the company in a short time. What kinds of training and transfer of knowledge and know-how did this entail?*

*Rep. Chalalan: "There already had a basic understanding of tourism because in the 1980s, we had worked in tourism, as guides, cooks, etc. In 1992, we worked on construction of a lodge to bring guests and so in some way we had knowledge, and we only had to perfect what we knew. We knew how to treat tourists. So that's why it was fairly fast. But the project came at a the perfect time because before that, it would have been challenging for us to get ready in just five years."*

*Empresario invitado: The biggest problem in the region has been a lack of training. Now in the 21<sup>st</sup> century, what we need to add is more resources to invest in training. In Bolivia,, who has had the luxury to invest so much? Only Chalalan. Who has had the opportunity to travel to Rurrenabaque and La Paz to learn about the whole chain of operations? Only Chalalan. But the costs for such training are very high and time consuming. Actually, five years is not a small amount of time. What other companies can boast of guides who speak English, have so much knowledge of biodiversity, etc. Only Chalalan. Big resources have made the difference.*

## **What difficulties have we faced and what were our solutions?**

### **KAPAWI**

The delegates from Kapawi expressed concern that perhaps Canodros had focused extensively on operational and financial aspects of Kapawi, but perhaps not enough on getting the Achuar partners ready to assume control of the operation. “We have reached various stages, like training people to fill staff positions in the lodge, but these achievements have just happened rather than come through planning.”

What have the problems been for Kapawi:

- There is little interest on the part of the Achuar to engage (or “ponerse la camiseta,” as they say locally), and it is because of this type of relationship of partners that we have with the Achuar—paying a rent rather than profits.
- We didn’t define in the initial agreement what the process for transferring would be. For example, we didn’t define whether or not Canodros would continue to manage the marketing long term.
- Because of the rent model of our partnership, the concept of transfer has been abstract and relatively lacking in participation.
- Certain areas have not been managed by the Achuar for cultural reasons. And that’s going to cause problems, unless they change their cultural perspectives. In the kitchen, for example, they do not allow women to work, but neither is it perceived as appropriate work for Achuar men.
- FINAE did designate anyone in the leadership of FINAE to oversee Achuar involvement in ecotourism until 2003 (the year of the Trueque). The federation has shown little interest in the process of transfer until then, six years after the signing of the contract with Canodros.
- Neither partner, Canodros nor FINAE, have the human or financial resources or time to overcome the obstacles to getting the Achuar ready to assume full ownership and management of Kapawi. They feel a long-term solution is to enlist the support of a third partner, a NGO. In the meantime, they feel it is important to elect a representative in FINAE responsible for the transfer process, or at least for serving as key contact for the newly perceived “strategic alliance” between Canodros and the indigenous federation.

### **WORKSHOP DIALOGUE**

*Rep. Achuar: The company has many things. The two sides have not been together in the search for resources to train the Achuar. We are always insisting that the company worry about this, because it is a commitment Canodros has made.*

*Rep. Canodros: The problem is very complex. As big as the project is, there are people who live three days' walk from the lodge and arrive to work, but that distance is too tiring for most employees. That means we have to have a fast rotation for purely logistical reasons, but the communities get jealous. Maybe the solution is to work with the community that are closest and seek financing to train other people in communities that are farther away.*

*Rep. Canodros: "There are two elements here. The first is that the problem is not just FINAE's. It's the nature of the agreement. The ideal ecotourism partnership would not be based on a fixed rent. The second point is that between the two partners, we have not united to say, 'No, wait a minute, FINAE is seeking support for projects in health, transport, education, etc., but we in Canodros couldn't collaborate with them to write a*

*proposal to finance the transfer also.' It is not just that FINAE has been relaxed. We have been too."*

*Rep. Canodros: "We had an experience in a critical moment in which we all sat down and reworked the agreement. On the side of FINAE, the idea was to raise the rent, and that was for lack of trust. In one year, there had been a certain number of guests in Kapawi, and three years later, there were three times that number. The Achuar asked, why hasn't the rent also increased? Finally, we renegotiated the payments, increasing it every four years. We didn't achieve anything though because the Achuar were not involved in the process."*

*Rep. Infierno: "I have a comment for the community members of Kapawi. Maybe they should invest in some form or part of its profits in education and training. It could be a type of donacion and contributing something to reinvest. Instead of waiting for Canodros or even for FINAE, [the support would come from] the community itself."*

*Rep. Achuar: "I have to carry these ideas to the community."*

## POSADA AMAZONAS

What have the problems been for Posada Amazonas:

- Lack of self-esteem—they don't have confidence in themselves that they can manage their own company.
- Rumors--They hear rumors about the lodge and automatically they tend to believe them, instead of trusting.
- Personal and family interests come before communal interests. Also, before we had a problem with nepotism, basically because everyone in the community is family. The Ecotourism Committee also has children, brothers, etc. working at the lodge. Now the things are handled through a human resources person in Lima, and there is a rule that is managed within the community. It was difficult at first, but now it has been accepted.
- Lack of understanding about the way a business works differently from a community. If people don't show up for faenas (communal work parties), for example, nothing much happens. But if they don't show up for work, then that's bad. We're still not assuming responsibility as company owners.
- Missing connection between the Ecotourism Committee and community members. At the beginning of the creation of the company, there were more interests, but in recent years, there has been less interest in the Committee. The problem is a lack of regular communication.
- Costs for the whole process: the Ecotourism Committee, comprised of 10 people receives pay. But that makes the transfer difficult. It is a cost that the company assumes, but there are rumors in the community. They say the members are getting paid for nothing, that they go to the lodge to eat and nothing else. Also there are costs in training and paying a salary for a coordinator between the company and community. These are all incremental costs.
- Lack of trust: community members say, "They [Rainforest Expeditions] are deceiving us,' or 'They're lying to us.' Comments from people outside the community who are opponents to the project, or competitors, often compound this problem.
- Some community members still do not respect decisions related to ecotourism: for example, there is a limit on fishing, but still, if you go to the lake, you find people fishing, even though there are sanctions. The rules are on paper but not implemented in practiced.

### Solutions

- We have a mediator, or neutral coordinator, between the company and the community. Part of this person's job is to edit a newsletter, "El Paucar," which is distributed in Infierno and provides regular updates on happenings in Posada Amazonas.
- We have a policy for controlling rumors, which is to ask for written proof or "concrete evidence" for hearsay.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

- We work with Community Communicators (or “Comunicadores Comunes”), who are in charge twice monthly of gathering concerns and rumors in the community and sharing them with the Ecotourism Committee, and then, conversely, taking updates and messages from the Ecotourism Committee and communicating them to families in Infierno.
- Our participation in the Trueque Amazónico and exchanging experiences with other lodges is an effort to address this problem.
- We apply for awards, and they seek donations from foundations and NGOs (i.e., MacArthur and Conservation International).

## CHALALAN

What have the problems been for Chalalan:

- There were no legal precedents for community companies, so we created Chalalan like a community stock company (or “Sociedad Anónima”).
- There was a general lack of understanding in the community about what a business was, and what the process of transfer would entail, so training was an important component of everything we did from the very beginning.
- Most community members lacked official identity documents, so we needed to get these in order to enable an official transfer of title to shareholders in San Jose.
- It was a challenge to maintain good communication between the community and NGOs, and so we hired Zenon Limaco from San Jose to serve as an intermediary.
- There were many changes of personnel in the Inter-American Development Bank (IDB) and CI. The persistence, continuity, and patience of San Josesanos was critical, and has been an element of success in the Chalalan case.
- The legal process went very quickly, so everyone involved had to learn and adjust quickly.
- There remains an ongoing problem of nepotism. In the leadership of Chalalan, it is not appropriate for just the brothers from one family to assume most positions. This is a challenge yet unresolved.

### **THE CHALALAN EXAMPLE**

*Rep. Conservación Internacional: The transfer was made in equal parts on those two dates. Fifty percent went to both, and then 50% to both again. Now, the church still has a small percentage because it served as intermediary. The biggest conflict came when 100% of the shares belonged to CI. Anyone could say s/he was working for CI.*

*The IDB told us, we will not give the capital to the community, but rather to CI, and CI are the active shareholders by law, not the community. CI was the owner by law, and we could not transfer the company. The question was how could we ask the community to contribute capital. We worked to make the OTB the adjudicators. The OTB made a plan to invest in the community: to do community works, build a road, construct a medical post, etc. That has been a capital contribution to the partnership.*

*That was a bit of an artifice, but it served to resolve the problem. In the transfer, we talked about shareholders, and we should note that IDB and CI did not take into account that there was no legal land title. In Bolivia, most lands are not titled. For Pokacha, the recommendation is to have legal land title, but it can be difficult in the case of Bolivia. The community has use rights on the land, for their physical occupation. But the transfer did not entail a transfer of territory, but rather a transfer of shares."*

*The Chalalan lodge is the company, and it is comprised of shares. All of the intangibles and the lodge itself are registered in public records as a stock company. But it is complicated because the legal base for the company is in Rurrenabaque even though Chalalan is in the a different department of La Paz.*

### **What are the concerns for the future?**

### **KAPAWI**

#### **Concerns for the future in Kapawi:**

How will the profits be distributed once the transfer is complete? "We have had experiences with an individual who used funds without clear or transparent records. Will the funds be managed appropriately? And will they be used in ways sensitive to conservation?"

When Canodros leaves the project, will there be conflicts between the different Achuar associations and communities? Will they dispute the propriety of the lodge?

"We're worried about the lack of preparedness among the leaders in FINAE to deal with land titling on the piece of territory where Kapawi is located. FINAE is divided into different zones, and each community has its own title. If there is no way to attain general title for Achuar

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

territory, Kapawi will de fact become the property of just the one association nearest to the lodge, Amunday.”

There is a lack of political will in the Federation to get involved and appropriate the process of transfer. There’s a passivity. They say, ‘Everything’s fine, 2011 is very far away, let’s leave things for another time.’ This is just the sense we have.

## POSADA AMAZONAS

Concerns for the future in Posada Amazonas:

We worry about internal problems of the community. How can we help the community become more objective able focus on company interests [in the context of running Posada Amazonas] rather than just personal ones. How, in particular, can they learn to manage conflicts of interest?

How can the community learn what a strategic alliance is? And can we eliminate the negative concept of “transfer”?

We’re worried about a concentration of families in Infierno focused solely on ecotourism rather than depending on a variety of economic activities.

## CHALALAN

Concerns for the future in Chalalan:

Especially now that we are working alone as a community-owned and -managed company:

- We are concerned that shares will be sold to people and interests outside the community
- We are concerned about a lack of formal alliance with IBD, CI and other organizations.
- We are worried there is no legal framework for promoting other community enterprises like Chalalan.
- We are concerned about the lack of professionalism in the managerial ranks.
- There is a lack of continuity in the leadership of Chalalan.

### *CHALALAN VOICES*

*Everything we have been trained in is going well. But beyond that, yes, we have problems. In terms offering quality services to our tourists, there is no problem. But on the issue of marketing, yes, there are some gaps. When CI left, the marketing was weakened. On that point, we do not feel well prepared.*

## How will we know when we are ready?

### KAPAWI

#### *Kapawi's readiness:*

The thing to do to determine if and when we're ready is first to establish the steps we need to follow. That will provide us with indicators. Specifically, the necessary conditions are twofold: structures for marketing, client service, lodge administration, operation, etc.—know which should be managed by the federation, and which by the company. Then we will focus only in these areas. Confirm before 2011 that the Achuar are prepared to manage their parts.

We'll also know we're ready when the Federation differentiates between politics and business. The politicians cannot manage the company. At the moment, they do not distinguish federation management from business management.”

### POSADA AMAZONAS

#### *Posada Amazonas' readiness:*

- External assessment, including performance evaluation in each position
- Monitoring of client satisfaction to ensure the quality of the product does not decrease
- Teamwork between Rainforest Expeditions and Infierno is relatively harmonious
- The level of self-esteem and trust of community members in Infierno

### CHALALAN

#### *Chalalan's readiness:*

We felt sure of ourselves, but in reality we were never really “ready.” We are still in an ongoing process of learning and overcoming challenges. We sensed we were ready because we already had gained some experience in managing tourism on our own, and then we also participated in a lot of training. Our increasing involvement in decision-making has been gradual.

## Our recommendations for other ecolodges.

### KAPAWI

#### *Kapawi's recommendations:*

- From the moment of signing the agreement, define the general parameters for the transfer; from the moment of sitting at the table, say ‘Finish in 20 years, but at the close of the agreement, we want . . .’ (with general concepts, but all defined).”
- Make sure the community takes responsibility and has the will to take the project, with contributions (financial, labor, etc).
- The involvement of a third, neutral actor in the process, such as an NGO or university, to serve as mediator and planner. In this case, an actor such as an NGO can cover expectations

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Chalalan, Posada Amazonas, Kapawi

of the communities in the first stage; after that, the NGO can help with training and capacity-building.

- Define the training process with clear goals.
- Socialize the process effectively. The Achuar territory is giant, and the southern part, the Achuar involvement has been ineffective, and they get and perceive few benefits from ecotourism.
- Identify a source of funds for the process.

## POSADA AMAZONAS

*Posada Amazona's recommendations:*

- Make sure the process is clear and transparent
- Make the process gradual, and ongoing throughout the project, and by phases, beginning with operations, which favor community participation in the lodge.
- Don't force the process; rather, let it flow

## CHALALAN

*Chalalan's recommendations:*

Have the backing and support of a document that establishes a timeframe for the transfer. Plan the process from the very beginning and have rules laid out clearly. Make sure that the transfer is more than just a transfer of capital, but also a transfer of knowledge, hierarchies, skills, mandates, and legal requirements. It is necessary to start transfer from the beginning, and be constantly *with* the people who are going to receive.

### ***THE CHALALAN EXAMPLE***

*Investment in Chalalan was \$1,250,000 from IDB and \$200,000 from CI. How was this money used? What went to consulting, training, or construction?*

*Rep. Conservación Internacional: First, there was overhead at IDB. It came from a fund in Japan and the U.S., and the Bank manages it. CI did not apply overhead for this project, It invested \$200,000 in case to pay the logging company, Hauser, to appropriate land, and it was more for conservation in Madidi than for the Chalalan project. What remained after that is about \$90,000, a big portion of which went to consulting fees and operating costs for consultants. If you add about four or five consultants, it was like paying for a Miami project in Bolivia. And the movement of materials for the construction. It was a time of trial and error: at first we worked with foreign consultants. About \$200,000 went to infrastructure and construction. A major expenses was also in bringing in outside materials. You can buy a water tank for 100 Bolivianos, but the Bank demands three bids for any purchase. So, in the end the same item can cost \$300. It is a high cost to manage the bids that the Bank demanded. In sum: indirect costs, of operation and training. In the analysis made by IDB, if they take out \$400,000 for training, there was a positive return. But with training, the return was negative. As it is a community project, training was necessary."*

### **THE POSADA AMAZONAS EXAMPLE**

*How did RFE and CNI decide on the 20-year timeframe? It seems to go beyond the normal planning horizon of most people.*

*Rep. Rainforest Expeditions: The goal was to get a return on our investment, and that meant a minimum of five years. But we wanted to do more than just break even—we wanted to make a profit. So, we projected ten years for that. Then we wanted to share the good returns after ten years of effort. So we settled on twenty years, but we didn't have a business plan or anything scientific. We said, "We want to cover our investment and we want some profits. No one had any idea how it was going to go. In the first six to ten years, it is going to be a process of maturation, and there will be problems. Later we'll be able to go more smoothly, and then we'll revisit what to do in ten-year blocks."*

*Rep. Infierno: As a community member, I feel the opposite. I feel it is premature to think that in ten more years we'll be able to manage everything. It is going to be a much longer process.*

*Rep. Infierno: Compared with the first years, we can see a lot of improvement in the administrative and management capacity of the Ecotourism Committee because they share a lot of decision-making with Rainforest Expeditions. I mean, there's progress, and I think the amount of time we've reserved for transfer is appropriate."*

*Rep. Rainforest Expeditions: At first, we did not want to put an end date [on the partnership,] but World Wildlife Fund, Conservation International, and everyone said we were going to be exploiting and abusing the community. But as investors, the idea was not to have a terminal partnership, but rather to continue working together."*

*Rep. Infierno: When Eduardo came with the idea of a twenty-year partnership, no one liked it because we didn't understand the reasoning. There were people who said, "Why not five years?" In the end, there was consensus, and we accepted the terms.*

*Rep. Rainforest Expeditions: I feel like the community knows much more than before. But it's like everything: the more you know about something, the less capable you feel to manage it all. They are always feeling like they need to know more. But I have been surprised how in just five years, they've gained so much understanding about the business.*

*Rep. Canodros: "We should think more about this question. Why fifteen years for Kapawi and twenty for Posada? First, it was important to set a time limit to avoid the image of exploiting the community. On the other hand, we feel as investors that fifteen years may be too short. Maybe twenty years would have been better from an investment perspective. But then there's the example of Chalalan, in which the return on investment was not such a big consideration, at least for the NGO. That's a critical element—the collaboration of an NGO—for the transfer process.*

### **Building Local Capacity (for Transfer or Continued Partnership) Consensus**

In summary, the main lessons learned from the discussions about transferring ownership to communities are threefold: 1) the need for written agreements with clearly defined responsibilities, goals, and timelines; 2) a general unease with the original concept of “transfer” and a preference instead for “strategic alliances.” The idea first implies a termination of collaboration; the second keeps the idea of training, capacity-building, and increased understanding on both sides, but opts for collaboration that does not necessarily end (i.e., there need not be an expiration date on partnerships); 3) the value of a third partners who can serve as mediators and communicators.

To have an agreement in which responsibilities for both partners are specified for a particular period of time. This allows each to assume roles to which they are best suited. Perhaps “strategic alliance” is the better concept than “transfer.” A strategic alliance does not require an culmination or ending, but rather an ongoing, evolving and mutually beneficial relationship for both.

A metaphor from Eduardo Nycander on a concept of long-term collaboration and strategic alliances that is an alternative to the idea of “transfer.” “There are two players here, and yet no one knew what was better. There is a big barrel with a thick liquid. Inside the barrel there are some marbles of different colors. Each color represents different positions in the company: guides, housekeepers, marketing specialists, cooks, etc. At the bottom of the barrel there are two exits. So, when they signed the contract is when the marbles were thrown to the barrel. It is going to take 20 years for the marbles to reach the bottom and each to go to the exits. Once all the marbles are at the bottom, they should easily move to their proper exits. Switching back to the real world and Posada Amazonas, the gradual division of roles between the company and community should be harmonious and coherent. It does not mean that the company is leaving, but that the community has learned, and knows what it does better and emphasizes on that, and the company too puts more emphasize on what it has learned and to what it should dedicate its time.”

Yet, even in strategic alliances, more and more meaningful community participation over time remains the goal. Community training should be considered at the start of the agreement, covering first technical skills and activities and services, gradually moving to more difficult and ultimately to professional roles, such as guiding, administration, marketing—assuming community members are interested in fulfilling such roles.

*Reflections from the Trueque:*

*"I've learned that communities really can manage their own companies. (JM, 6/22)*

A critical element of strategic alliances is transparency and strong communication between partners. Ideally, a third, relatively neutral partner (either an individual, a small group of overseers, or an organization) can help maintain lines of communication and minimize misunderstandings and rumors.

## What is the idea of “transfer?”

### Company-Community (Posada Amazonas)

- Recognition of capacities of each partner
- The partnership need not end, and contracts can be renewed

### NGO-Community (Chalalan)

- Achieve the objective regardless of the investment
- Limited time
- Little to no follow-up. When the contract ends, the partners go their separate ways

### Company-Federation (Kapawi)

- The terms are set but the process is not yet. (Though participants agreed that ill-defining a process is not the preferred method!)

## 2) What are the best elements of each case?

### Company-Community (Posada Amazonas)

- equal participation in decision-making and economic benefits—the community can say what it wants to do with profits and other earnings
- not having an ending date—provides more flexibility
- process of training by phases and areas, this permits a gradual assuming of decision-making, little by little

### NGO-Community (Chalalan)

- few problems with budget (though participants note that the case of Chalalan is unusual, normally NGOs do *not* have vast budgets).
- training in business management combined with environmental responsibility
- institutional strengthening in the community
- community participation—it was the members of San Jose who indicated in what areas they wanted to receive training and what they wanted to do.

### Company-Federation

- on-the-job training in operations

*Reflections from the Trueque:*

*"I've learned that the role of the mediator between the company and community is important, especially to maintain good communication, but also at the time of agreement so that the 'rules of the game' are set clearly and understood by everyone from the beginning."*

#### 4.6 Tracking Changes in Communities

Questions for workshop discussion:

- ★ Has family life changed since we began to work in ecotourism? In what ways?
- ★ How has the community changed since we opened the ecotourism lodge?
- ★ Has family life changed since we began to work in ecotourism?
- ★ Are we richer now than we were before we began ecotourism? In what ways?
- ★ What kinds of things do we think about now that we never thought before ecotourism?
- ★ What kinds of things do we do now that we never did before ecotourism?
- ★ Do we feel we work more now than we did before ecotourism? In what sense?

Participants were then asked to assess their answers to each of these questions and then select the responses that represented problems or challenges for the community. Then, the discussions turned to finding solutions to the problems faced by all.

Changes in the life of the community. The following section contains a summary of the changes most often identified by the delegates from Chalalan, Posada Amazonas, and Kapawi. During the workshops these changes were not objectively classified as “good” or “bad,” some people felt strongly that certain kinds of changes were distinctly negative and others were positive.

A summary of the positive changes includes:

- Improvement of infrastructure for health, education, and transportation
- People talk about and do more for conservation
- There is a greater concern for things related to the company There are more people worrying about outcomes and results.
- There is greater sense of identity and self-esteem with respect to local culture There is greater equality of opportunities for work for both men and women There There is greater human capital and skills in the community, and greater capacity to manage projects among community leaders
- There are new possibilities to develop other activities, such as handicrafts, fish ponds, and wildlife breeding
- More confidence in outsiders
- Those who work in the lodges now understand the importance of concepts like punctuality, responsibility, client satisfaction, and decision-making

A summary of the negative changes includes:

- Distance from family
- Rise in jealousy and suspicion against those how work in the lodge
- Certain loss of community spirit, specifically with regard to communal work. Now there is interest in individual gain through paid employment, and not in voluntary work for the community.

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- Some people have become dependent on profits from tourism and have abandoned other subsistence and income-earning activities.

-

A change many delegates described as potentially positive or negative is greater contact with Western society, in particular because of better infrastructure, now with roads and airports and greater access to cash.

### **Has family life changed since tourism began? In what way?**

Mixed responses from Kapawi, Chalalan, and Posada Amazonas:

- ☞ More work opportunities
- ☞ Economic stability
- ☞ Greater possibilities for education and health for children
- ☞ No changes

*Perceived problems:*

- \* Less time with family
- \* Distance from family, saving money and they go to the city to have fun instead of returning home to family
- \* Less time for family work: in the chacra and house and so now there's a need to contract labor.
- \* Customs about family gifts, such as food have disappeared. Family solidarity is missing.

### **How has the community changed since tourism began?**

Mixed responses from Kapawi, Chalalan, and Posada Amazonas:

- ☞ Jealousy in the community when an Achuar has worked too much time in the lodge
- ☞ In decision making, more time is devoted to benefits from the hotel .
- ☞ There is a change in understanding in how to manage community-based ecotourism by a small group of Achuar in the Association Amunday
- ☞ In all of the communities, people talk about conservation and the need to create a reserve
- ☞ People generate new ideas and expectations about other projects, such as creating other lodges in the Achuar territory
- ☞ Better infrastructure, such as a secondary school and a handicrafts workshop
- ☞ The community is able to handle problems
- ☞ The community is better informed
- ☞ There is pride in the lodge
- ☞ Economic differences
- ☞ Better access to transportation, communication, health, and education
- ☞ Stronger sense of identity and self-esteem
- ☞ The community has united more to respond to problems with other communities

*Perceived problems:*

- \* The mingas before were more common in the community of Kapawi; now they want money for community work
- \* Abandoned children

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- \* Tourism has taken time away from the Community Council to address other community matters
- \* More drunkenness
- \* There is a greater number of decisions to make but the process remains slow.

### **Has family life changed since tourism?**

Mixed responses from Kapawi, Chalalan, and Posada Amazonas:

- ⊃ Greater equality in educational opportunities and in work between men and women in the household, by their own choosing

*Perceived problems:*

- \* Greater separation between parents and children

### **Do we have more (or are we richer) now than we were when we started tourism? And in what ways?**

#### *ACHUAR VOICES*

*In the Achuar pueblo, we are rich. We have trees, rivers, fish. We have freedom. Our dogs and chickens run free. When we took eight people from the oil company, they wanted to pay us, but we didn't accept. We are not guerrillas to catch so that can pay us. We are really defending our territory. We are never going to change for money. We are rich for nature. Among the Achuar, there are people who have nice beds, ten employees, cars, everything. We are not all equal, we don't need employees to be richer. No one is richer, and no one is poorer than we. We simply do not use the term "rich" unless we are talking about food.*

Mixed responses from Kapawi, Chalalan, and Posada Amazonas:

- ⊃ Nicer things in some families, and at the community level, such as handicraft workshop, secondary school, pre-school.
- ⊃ Greater consciousness about conservation
- ⊃ Greater human capital and more skills
- ⊃ More friends and contacts
- ⊃ We are richer in natural resources
- ⊃ We are rich in knowledge
- ⊃ We have more economic opportunities through ecotourism
- ⊃ The creation of a activity compatible with conservation that guarantees subsistence for future generations
- ⊃ The Achuar have always been rich in nature (“There is no one richer.”)
- ⊃ We don't see the difference between rich and poor, we live free, it doesn't hurt not to have money. Only when necessary, such as for health or education, do we look for money to cover expenses.
- ⊃ Just now have we started to talk about money.

- ✧ “Rich” does not mean accumulation but rather the ability to help one’s own family and others
- ✧ Wealth is related to what you do and prestige, for example, teaching, lodge employee, or farmer.

*Perceived problem:*

- \* Because they work in the lodge, people believe they are richer and so they get charged more for things.

**What things do we think about now that we never thought before?**

Mixed responses from Kapawi, Chalalan, and Posada Amazonas:

- ✧ We think about conservation, and in wildlife conservation, in particular
- ✧ Now there is greater trust in outsiders
- ✧ Before we thought only about studying to be a professor; now the expectations have changed, especially among the youth and women.
- ✧ We think about defining our tenure of our territory that is guaranteed by the government
- ✧ New strategic alliances, with NGOs and private companies
- ✧ New political relations for structural changes in legislation for community enterprises. “Now the community of San Jose is trying to influence national level policies on that point.”
- ✧ Advising other communities in ecotourism. “Chalalan is a pioneer, but there are others in the region, like Mapajo (another community-based ecotourism project in Madidi), which have come asking us how best to work. Now we are thinking about helping them.”
- ✧ How to resolve internal conflicts with respect to ecotourism, by looking for third party mediation, looking for similar situations in other places, making it clear what would happen to the company if the community were to become legally divided.
- ✧ Protection of communal lands. “This is partly to protect our company. We never worried about protecting communal land before. Now even the colonists (or riberenhos) are more concerned about protecting our lands.”
- ✧ Being more skilled. Now that we find more support from NGOs, we want to be skilled to work with them.
- ✧ How to invest profits. If we continue investing poorly, we will never improve.
- ✧ How to capture opportunities to achieve more community development.
- ✧ Developing the tourism product. “In Posada Amazonas, we want to expand tourism activities, create more possibilities.”

**What things do we do now that we never did before?**

Mixed responses from Kapawi, Chalalan, and Posada Amazonas:

- ✧ Change of attitude related to hunting. Before we hunted animals just to kill, but not always for necessity.
- ✧ There is greater integration between the Achuar and other communities.
- ✧ Now we don’t sell or trade wild animal species.
- ✧ Now we are creating zones for conservation, thinking about future projects.
- ✧ Now we are paying sanctions for breaking rules related to hunting in trails near the lodge

- ✧ We dedicate more time to ecotourism
- ✧ More national and international travel for cultural exchange and professional development
- ✧ Greater leadership skills within the community
- ✧ More relations with national and international organizations, and with people from different places and types of knowledge
- ✧ Greater consciousness about conservation
- ✧ Greater interest in professional development
- ✧ Greater concern for assuming responsibility
- ✧ Handicrafts
- ✧ More meetings focused on tourism
- ✧ More investment in education
- ✧ More children studying in the community

*Perceived problem:*

- \* Now we change money for communal work, with individual contracts, or, alternatively, we pay to get out of communal work obligations.
- \* Greater neglect of families
- \* Some engage in fewer everyday activities, such as hunting, fishing, farming and extraction because they are waiting for profits from tourism and other opportunities for work. “Some have misunderstood how much they were going to benefit from ecotourism, and so they do nothing. Instead of tending to their chacra, etc., there are just waiting for tourism money.”
- \* Personal interests for developing ecotourism apart from the community enterprise

**Do we feel like we are working more than before? In what sense?**

Mixed responses from Kapawi, Chalalan, and Posada Amazonas:

- ✧ Definitely! But just among those who are directly involved, such as the lodge staff, the members of the Ecotourism Committee, the Community Communicators, the handicraft artists, etc.
- ✧ More hours
- ✧ Before we didn't have to think about what the people think. Now we think about what they think . . . before we didn't have to think what the others were thinking about the project. People on the Ecotourism Committee, the responsible ones, have to think about what the others are thinking about the project, their community. What are we doing here now? We are thinking about what everyone things . . . it's thinking for them, that's all.
- ✧ Not everyone thinks working more is better. “Working a lot is good, but not everyone feels the same way. Some thing they can learn more things, for sure, just the fact of being here is good and we are enriched by this. Some people in the lodge say, if I am a boat driver, I am going to work in that and nothing else. That's why them pay me.”
- ✧ Greater responsibility
- ✧ Decision making
- ✧ Punctuality
- ✧ Client satisfaction
- ✧ We work more in handicrafts to sell too the lodge

- ✧ In six communities near the lodge, the work on the farm or chacra has increased because there is greater demand for products such as yuca, bananas, papayas, pineapples, etc.
- ✧ Those who work in the hotel do work more
- ✧ Even if it rains you have to work
- ✧ In the community, there are no schedule, and the activities we do are less formal.

#### *VOICES OF POSADA AMAZONAS*

*With respect to the question, do we feel we are working more. Yes, definitely, especially those who are directly involved in tourism. For example, the lodge staff works more than eight hours, especially the people who love the project, they never complain. The Ecotourism Committee works in another sense because apart from the project, they have their families, their farms, and other activities. The Community Communicators invest a lot of time in informing the community. The handicraft artists too. I am here [in the Trueque], and when I return, I have a lot of work that I'm going to have to do.*

### **Challenges and Possible Solutions**

#### **Problem: Distance from family**

Possible solutions

- Rotation of teams of employees, but that has consequences for the companies
- Bring family to the lodge on special occasions
- Do not hire members of the same family, but that is not applicable to Kapawi because they only hire men anyway
- Stimulate work with monthly bonus apart from fixed salary, but only if service is excellent, according to tourist evaluations

#### ***Discussion notes***

*Rep. of Chalalan:* The lodge are not the only ones who have this work system like this. The oil companies too, though they're system is much cruder (haha).

*Coordinadora:* The people involved in ecotourism are the people who wear the shirts for the parties, the Sundays, etc.

*Rep. of Posada:* It is a problem that must be very common in the world. And there must be companies who have solved it. What do the airline companies do? Or in oil companies, do they worry about their employees' families?

*Another rep. of Posada:* There are places in the world where they do worry about their employees.

*Rep. of Kapawi:* In the airline companies, they have to separate from their families, but the benefit is free airfare.

*Rep. of Posada:* To every employee, once a month, they can bring their family to the lodge. It's not a total solution, but it minimizes somewhat the social cost.

*Rep. of Chalalan:* To work in the rainforest, the people start to get desperate for their families. Working more than two months is exhausting. We know we have to do something, but

we are . . . we are three hours from the community. Posada is closer to the community. In Kapawi, you have to travel by small plane, and that's even more complicated.

*Rep. of Posada:* There can be vacations every two months, but they can't be paid vacations. The employee can take a break, but he'll lose.

*Another rep. of Posada:* In Posada, you have five days free per month, but just the same there is a problem of being separated from the family. Here [in Kapawi] the problem is worse because they lose a whole day traveling.

*Another rep. of Posada:* There are various things we can't change. You can pick young people who don't have so many obligations at home. You can never compare one's situation with others. My brother works four months in the mine, and he comes out to spend one whole month with his family. You really can't compare. What am I doing, and what are the others doing? Little by little, you'll settle with a selection of teams. The big companies have very young people who travel all the time. That's probably going to happen with community ecotourism too.

*Rep. of Chalalan:* When one works in tourism, there is no schedule [meaning the work never ends].

*CI-Ecuador:* In the theme of community-based ecotourism, you talk about social justice. Maybe the law can say you have to have five days of vacation per month, but they have day how many days they are going to take; that is, work 20 days and have 10 days free. It's whatever you decide internally.

*Rep. of Chalalan:* You can't forget that there is a proposal to change in terms of time and space. Some have, . . . the transformation of products for commercialization and others don't have. We enter services that perhaps is the last trend on earth, and that change has a philosophy of social benefit and good treatment of employees. It reflects a policy of the company, but with a balance between earning money and taking care of people.

*Rep. of Posada:* It is a process of selection. If you have two people that are equally competent and one has family, then you have to be conscientious. It's another aspirin that maybe is not the panacea, but it helps.

*Rep. of Kapawi:* You have to give opportunities to everyone, not only those who have families.

*Rep. of Posada:* It is better to have a nucleus of development than nothing at all.

*CI-Ecuador:* The benefit for the family is the challenge for ecotourism. Maybe to solve the problem it is dangerous to involve only young people.

*Rep. of Posada:* Another question would be: Is the family prepared? Or is it worth the it to work at this cost or not?

*Another rep. of Posada:* Some spouses want to work together, but that's not the best idea because then the children are abandoned. The family can benefit, but only one spouse at a time.

### **Problem: Bad will and jealousy toward those who work in the lodge**

#### *Possible Solutions:*

- NGO as a bridge or one person to serve as communicator, to help reduce gossip and misinformation
- More information from employee to employee and community member to help control gossip

- Increase benefits for all (not just workers) through satellite projects, or works that are complementary to community development and ecotourism in the communities.

### ***Discussion notes***

*Rep. of Posada:* We have to form an agile system for communication between decision makers and the community to keep people informed

*Rep. of Kapawi:* Yes, and that also helps solve the problem of jealousy.

*Rep. of Chalalan:* There has to be coordination between what the company's doing and what the community is doing. And everyone should be informed about ecotourism activities.

*Rep. of Chalalan:* If I'm feeling jealous because someone has gone to work at the lodge, how is keeping me informed going to solve that problem?

*Rep. of Posada:* It ameliorates, but doesn't solve the problem. Motives can be explained through good communication. A lot of times jealousy arrives because of misunderstanding. And when you explain what's going on, you can eliminate some of the jealousy.

*Rep. of Kapawi:* People think that work in the lodge is easy work and it's just a gift. When someone comes to work in the lodge, they think they are going to be millionaires. If there were more communication, we could help clarify how it really is. *Rep. of Kapawi:* Communication also helps raise awareness that tourism is not just for some but for all.

### **Problem: Slow decision-making with regards to the company and the community**

#### *Potential solutions:*

- Define responsibilities, create norms and procedures. It must be clearly defined who does what between the company and community.
- Make sure that time invested in representation and decision-making for the lodge has to be compensated economically.
- Establish a communication system between the company and the community, through a person, a newsletter, or a bulletin.

### ***Discussion notes***

*Rep. of Posada:* Infierno is a mixed community of ribernhos and native Ese'jea. Posada is a lodge that shares two cultures who now are planning a separation. Now what do we do with the company? The company has to keep working. Why is that a problem?

*Rep. of Kapawi:* The problem would be in the separation.

*Rep. of Posada:* It's a problem because it is extra time-consuming to make any decisions. There is now a Ese'jea Council and Riberenho Council, and that takes a lot more time.

*Rep. of Posada:* There are things that are paralyzed in the community now. It's a problem because instead of thinking about how to improve the community or the ecotourism project, people focus on the problem of the separation.

### **Problem: Some people are not engaged in their normal everyday activities because they are just waiting for ecotourism profits**

#### *Possible solutions:*

- Create a strategy for communication; it would be work between the company, community, and NGO
- Diversify the economic activities related to tourism and define responsibilities

### ***Discussion notes***

*Rep. of Chalalan:* The ecotourism company can identify products. An example from Chalalan is the production of chickens and eggs that has generated an activity that is going to benefit everyone. The first step was to make a supply of products for tourists to consume in the lodge. Say, 'Here is the demand,' and then see how much the community is able to produce and supply.

*Rep. of Posada:* The idea is to identify market opportunities for the communities. Someone, the NGO, should take the opportunities and propose them to the community. The Ecotourism Committee or the council can be in charge of contacting the NGO.

*Another rep. of Posada:* I agree with the idea of identifying activities. We had focused on that in Posada, but we have the problem of the fact that the activities are already identified, and the people don't know how, or don't want, to take advantage. What can we do to get people interested in pursuing these opportunities? I would suggest the community council be responsible for making people aware that the opportunities are there and that they should not just wait for economic benefits from the lodge.

*Rep. of Posada:* The profits of a community do not have to increase in the future. Ecotourism has fixed costs and we are not going to be able to house 10,000 tourists. There has to be a limit, and so what is going to happen? We have to show the community that that is not going to change, and if they want to have increasing income, they should not abandon the other activities, such as farming, in case benefits from tourism are not available in the future. With the communication strategy, people have to say there are other alternatives, part of a development plan.

### **Problem: Personal interests in generating ecotourism activities apart from community enterprise.**

#### *Possible solutions:*

- Update and revise statutes and rules
- Spread the statutes and rules with the community and other companies.
- Apply sanctions effectively
- Explain the difference between community benefits and personal benefits, specifying that the territory is property of the whole community

### **Problem: Now people charge money for communal work**

#### *Possible solutions:*

- Strengthen community organization

### ***Discussion notes***

*CI-Ecuador:* In general, the willingness to go mingas has diminished. Now everything has to be paid even though traditionally it was not.

*Rep. of Posada:* An example in Infierno is the secondary school. One person donated the cement, and said, 'I will contribute my knowledge and I'll do it.' But afterwards, they said, 'No, that's a lot of work, pay us.' Now there is a costume of doing work for pay. Now all of the community members demand pay in exchange for work.

*CI-Ecuador:* This is negative because before the community had a school, including for those who don't have children." Now they say, 'Either you pay me or I won't help.'

*Rep. of Posada:* There is something there, with respect to us as a community. I note a difference when there is more for a community member for work, seeing in the case of the side of the company when we do faenas. The communal faenas before were very efficient with 70 people. Not now. But to make it effective, we don't necessarily have to pay money, but now we have to provide at least food or a snack, and that is a cost too. We don't pay money, but we provide something else. So if the company is giving, over the long term that is going to cause a problem to the community. The company has given, and now the community is supposed to too. Now they apply that in the community too because it is a way to bring people together [offering a snack or something]. But that can introduce a new problem. A case I have seen in which people don't do anything. There are people who are there, and they say, "I have money, so I am going to pay someone to go for me.'

*CI-Ecuador:* People have lost their sense of community.

*Rep. of Chalalan:* But is that bad? If you have sacrificed to earn money, why can't you use that money to pay for the service? And then that person is earning something too.

*CI-Ecuador:* But in that way, the community is going to be different. The minga is not just work or a job, but rather a social gathering of people to do something together, everyone side by side, even drinking together, and being a community.

**Problem: People believe the lodge employees are working and therefore rich, and so they should pay more for things.**

*Possible solutions:*

- Establish price rules and makes sure the product sold is of high quality
- Raise awareness among the community

### ***Discussion notes***

*Rep. of Kapawi:* People now want to charge more. The people in the community want to charge the same price for the good or service, but they want to charge more to people who work in Kapawi than they would to other people. For working in the lodge, everyone thinks they are earning more. A solution is to establish standard prices for the community, because everyone should be charged equally. They think they can charge more to the community member who is working in Kapawi. \$100 for working in a chacra, but why not charge the same to other. Everyone is a community member, an everyone has the same vision. It doesn't make sense to charge differently.

**Problem: More hours of work ("You work even if it rains.")**

*Possible solutions:*

- Work in two turns
- Just accept the work and earn more too!
- Implement more incentives for personnel, such as bonuses.

*Discussion notes*

*Rep. of Posada:* You have to worry about your family. It's double work. The communicators have to dedicate time to both sides, the community and the company. The artisans do too. But the work also brings benefits. As a leader, everything has its benefits, because I am learning, and I have my free time to dedicate to other things for my family. It's a problem that also brings benefits.

*Rep. of Posada:* Before we didn't have to think what the people think. Certain people in the leadership now have to think what the people think and they have to try to resolve problems. That all takes more time, it's another kind of work, another kind of effort.

*Rep. of Posada:* They think that working more is not good. For me it is better because it brings more economic support. But not everyone feels the same. Some people just want to work less, and we have to accept that.

*Rep. of Chalalan:* On this theme, not everyone thinks that working more is better. As hard as we work, not everyone works equally hard. You have to raise consciousness about accepting what "work" really means. How can we make them understand? It is better to help people understand the norms of the company and raise awareness before they start to work in the company.

*Delegado Posada:* Despite this problem, we say, 'I am going to try.' They go, and after one month, they say, 'No, this is not for me.'

## 4.7 Managing Natural and Cultural Resources

### *Natural Resources:*

- ★ What do the tourists come to see?
- ★ What more could tourists see?
- ★ What factors are threatening these resources? How do we know?
- ★ What are we doing to protect these resources?

Participants also listed the set of rules, sanctions and incentives they had created for conservation in their respective communities. They specifically address rules, sanctions, and incentives to make agriculture, hunting, fishing more sustainable in their three sites.



*Wildlife discussions with Achuar*

### *Cultural Resources:*

- ★ What messages do we want to convey to tourists?
- ★ What aspects of our culture do we want to show to tourists?
- ★ What aspects of our culture do we want to keep private from tourists?
- ★ What aspects of our culture do we see now that we rarely encountered before ecotourism?

Participants also discussed “codes of conduct” among tourists visiting their communities.

## Management of Natural Resources

- Zoning is vital, and having a reserve where only tourism take place and other extractive activities, such as hunting, logging, and farming are off limits.
- Establish rules of use for different zones and make sure compliance with the rules is effective and widespread.
- Establish and make sure guides and tourists follow Codes of Conduct for observing flora and fauna
- Establish research and monitoring of flora and fauna to determine possible impacts and contribute to enhanced understanding of the resources
- Use clean technologies for tourist operations, such as four-stroke engines, solar energy, waste water management, and the use of biodegradable products.
- Have programs that seek support for conservation, such as programs encouraging “adoptions” of trees, wild animal species, or provide incentives to people who have eagle nests on their lands, or zoning for hunting, or encourage selective extraction of resources, or agroforestry, and captive wildlife breeding, and other kinds of projects that seek to integrate conservation and development.
- Threats to natural resources include:
  - Expansion of agriculture, with forms of slash and burn that do not allow ample time for fallow areas to recuperate through natural succession.
  - Logging: Selective logging of particular species that are vital to certain wildlife species, including the example of the Shihuahuaco trees in Peru that are cut for

- the production of charcoal but also that provide important nesting habitat to macaws, a key wildlife attraction for Posada Amazonas.
- Fishing that uses poisonous leaves of the barbasco plant.
  - Hunting is a threat to natural resources not necessarily because they deplete the wild population, but because they hunt indiscriminately in areas near tourism and therefore disperse or deplete local populations for the wildlife species that are also key attractions for tourists.
  - Harvesting of wild palm fruits tends to be done in an unsustainable fashion because people cut the palm to collect the fruit.

*Reflections from the Trueque*

*Codes of conduct with tourists should be created by the same people within the community.*

*There are always problems with complying with rules, or better said, with sanctioning. Because they have this idea that if you don't sanction, you will always have someone against the project, and it will be impossible to maintain rules, and the project will fail, no? So, there's this problem that is not easily resolved. If not, when someone breaks a rule, and it's let's say, the family of someone on in authority, they have to sanction. So, you don't sanction because you're friend or family. And there is this problem of mixing a private company and with family and community is complicated. In the company is everyone from the community, and it is difficult to break the links" (JG, 7/16).*

### **Management of Cultural Resources**

- Tourism has favored the revalorization of culture and the feeling of pride in being “native.”
- Tourism has also prompted new interest in “cultural rescue.”
- It's true also that tourism has brought more exposure to western culture, and if some of those outside characteristics are assumed by the population, that does not necessarily mean that people are no longer “native.” For example, what people are wearing, or what they are driving, or cooking with or lighting their homes does not necessarily define their status as indigenous.
- With regard to management of cultural resources, it is vital to respect culture and local desires with regard to whether and how to present and represent culture to tourists.
- It is essential to establish and uphold Codes of Conduct for showing culture, and community to tourists. Participants agreed that Codes will vary from community to community, but some common ones are the following:
  - Place limits on where tourists can go and what they can do when they're there.
  - Educate tourists about how they should behave when they are visiting communities.
  - Do not allow tourists to give gifts, especially to children. Gifts should be channeled through the lodge or other organization that can accept donations on behalf of the community.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

- The lodges themselves are also expressions of local culture because they are products of the community, and, in many cases, they are located in communal territory. Therefore, Codes of Conduct and rules for community tourists visits should be applicable to the lodges as well.

**What do tourists come to see? Some were specific, some were general.**

## **KAPAWI**

Natural Resources: Birds (clay lick), monkeys, dolphins, otters, giant trees, medicinal plants, piranhas, caimans, sacred sites and landscapes (with oxbow lakes and rivers), wild flowers, and the forest ecosystem.

Cultural Resources: The Achuar: material aspects of their culture, such as clothing, homes, food, customs, as well as immaterial, such as history, beliefs about personal and communal life, and the spiritual, including rituals (shamanism, ayahuasca ceremonies, and guayusa tea drinking), and contemporary changes in the community, and expectations for the future

The Project: The Kapawi lodge, and its architecture, its setting on the lake, its history, and in particular the relationship between the company, Canodros, and the Achuar communities. They also want to understand what makes it more sustainable, and how Kapawi as a company practices environmental conservation through waste management, solar energy, environmental education and incentive programs with the Achuar.

Adventure activities, such as camping, kayaking, and hiking.

## **POSADA AMAZONAS**

Fauna: jaguar, tapir, giant otter, toucans, macaws, parrots, harpy eagles, hoatzins, and many other birds, fish (especially piranhas), various species of monkeys, peccaries, capybaras, and butterflies.

Habitats: clay links, palm swamps, and oxbow lake

Flora: the forest itself, brazil nut trees, ceiba trees, orchids, and big variety of medicinal plants

Landscapes: Canopy, lake, forest, and river

Culture: people and the community itself. Local architecture, houses, farms, traditional hunting, traditional fishing, handicrafts, a medicinal plant garden, local foods, drinks, and music, myths, legends, and anecdotes, and language.

## **CHALALAN**

Landscape: The Madidi National Park, the lake, the river, pristine forest

Fauna: birds and mammals

Flora: medicinal plants, trees

Culture: costumes, handicrafts, dances, and archaeological sites

*Reflections from the Trueque*

*I noted differences in hunting. Tourists have a chance to see wildlife. Here in Kapawi, the chance to see wildlife, apart from the river dolphins, even with so much primary forest we have, you can see how much of it has been trammled. When you travel and have the chance to see wildlife—the monkeys are the clowns of the forest—and if there are no monkeys, the experience is incomplete. Hunting here is necessary because people live from that, but on what time scale? For how long? So, the forest is different in different places, maybe Posada that receives so many people, precisely because the people can see much more wildlife, and the community has become conscientious, and they've noticed that they want to live from tourism, and if that's the case, they have to preserve the wildlife" (JM, 6/22).*

**What more could the tourists see?**

**KAPAWI**

The canopy in an observation tower or canopy walkway.  
A traditional farm with ethnobotanical tour  
Scientific research station  
More wildlife!  
Blinds and observation sites for birds and mammals  
Cultural programs, such as artisans sharing their skills as they work  
Other supervised programs

**CHALALAN**

Walking tour of the community to see people's farms, communal resources, and handicrafts  
Saltlicks and macaw nests  
Lowland archaeological ruins  
Observation tower

**What things are threatening our resources, and can we tell?**

**KAPAWI**

*Threats to natural resources*

a) Hunting:

- Hunting with rifles—the sound of the fire scares animals and they disperse
- Indiscriminate hunting—there are no sites defined by zoning where hunting is limited or prohibited
- Excessive hunting—the Achuar are killing more animals than they need. “We can tell because we know the jaguar walks around here, but we don't see it. Also, before you could hear wild turkey, and now you almost never do. People go out to hunt now and return with nothing.”

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

- b) Fishing with poisonous plant, barbasco
- c) Excessive harvesting of wild products, such as heart of palm. You can tell because before there was a lot. Now we have to walk more than an hour to find it.
- d) Inappropriate techniques for observing wildlife with tourists. Some groups got too close to nursing otters, and the animals fled to others sites. There is a lack of research and monitoring of wildlife populations in the Achuar territory around Kapawi. There are possibly too many tourists in some sites, such as Lake Pitzacochoa.

*Threats to Cultural Resources:*

Actually, we feel tourism is contributing to a revalorization and protection of our Achuar culture. However, there is an invasion of private space when tourists visit families in the community. Sometimes the owners feel uncomfortable.

Lately, there has been a change of attitude towards the tourists. Many Achuar have learned to sell handicrafts and so now they also want to charge tourists to show them a monkeys or other things.

## POSADA AMAZONAS

- a) There is a problem of deforestation where people have made their farms or chacras. This disturbance threatens all of the fauna, flora, and landscape in the area. Deforestation also threatens cultural traditions that are dependent on the environment, such as plant use for medicinal, nutritional and other purposes, hunting, and handicraft production..
- b) A secondary threat to resources in Infierno is selective logging. Shihuahuaco is a tree species important to macaws, parrots, harpy eagles, all major attractions for Posada Amazonas. Yet, Shihuahuaco is also an important economic species because locals cut it to make charcoal to sell in the market. The huasai and ungurahui are two palm species important to the local economy, especially for household construction, food, and handicrafts. The palms are also important habitats to various bird and mammal species important to tourism.
- c) Hunting and fishing are third threats to resources. People hunt monkey, tapir, macaws, toucans, peccaries and capybara, all attractions important to tourism. Fishing is a problem too because the giant otters depend on a healthy stock in the oxbow lake where people fish.

## CHALALAN

Our community is threatened by a lack of land title and we have conflicts with other communities. There are big companies, such as oil and logging companies operating in our territory too.

Other resources for tourism, such a the salt licks and nesting sites are potentially threatened because we have not plan for managing them as resources for tourism.

## How are we protecting resources?

### KAPAWI

- ✓ Zoning the territory to prohibit hunting in areas around the lodge
- ✓ Using four-stroke engines in our boats
- ✓ Using biodegradable products
- ✓ Managing waste water
- ✓ Establishing rules and Codes of Conduct for community visits
- ✓ Helping the community understand and accept the establishment of an Achuar Ecological Reserve
- ✓ Fighting to keep out oil companies, and generally defending Achuar territory

### POSADA AMAZONAS

- ✓ Various projects to protect harpy eagles, macaws, and giant otters, three of our most important wildlife attractions
  - “Adopt a Shihuahuaco Tree” Program
  - Rewards for finding macaw and harpy eagle nests
  - Artificial nest boxes for macaws
  - Protection of forest around harpy eagle nests
  - Monitoring of clay licks and macaw nests
  - Regulations on use of the oxbox lake
- ✓ Zoning and Management of hunting
  - A communal reserve of 2,000 hectares for protecting flora and fauna
  - Initiatives to introduce alternatives to wild game, including fish ponds, captive breeding of wild game species, small livestock production, especially chickens
  - Management plan in collaboration with Conservation International
  - Community-wide prohibition on hunting otters, harpy eagles, and macaws
- ✓ Sustainable Harvest
  - Prohibit the cutting of huasai, ungurahui and other palm species
  - Reforestation of yanchama, a species used for handicrafts
- ✓ Protection of Cultural Resources
  - Centro Ñape is an ethnobotanical garden in the community that spotlights Ese’ija culture and offers workshops on Ese’ija language and traditional ecological knowledge
  - Training for bilingual or trilingual (Ese’ija, Spanish, and English) teachers
  - Hire professors to teach only in Ese’ija
  - Emphasize cultural traditions in handicraft production
  - Traditional architecture and materials used to construct Posada Amazonas
  - A local farm, or chacra, is part of a standard tourist itinerary. Visitors learn about traditional swidden-fallow practices appropriate to Amazon soils and climatic conditions.
  - We offer many traditional items on the menu and there are various types of culturally-specific service: suri (or beetle larvae, a local delicacy) is offered as a

snack, “Los Mapachos” is a local musical group that performs occasionally for tourists, and we are developing a “Spa Ese’aja”

- ✓ **Management of Tourism:**
  - We have only 30 rooms
  - We manage waste
  - Tourists are permitted only in certain designated areas, and they must be accompanied by a guide
  - Rules for visits to the lake, clay lick, community, and all other points along the itinerary

## **CHALALAN**

- ✓ **Community:** securing land tenure
- ✓ **Raising awareness** about the importance of sustainable use of resources
- ✓ **Salt lick:** Seeking support for a management plan

### **Agriculture: Rules, Sanctions and Incentives**

#### **Rules:**

- Zoning for agriculture
- Each family has a field they want—family parcels. “There are some rules, same to the family zoning, where farming is done only by the family. People can’t just take things from other families’ farms. Farm produce is only for the families that grow it, and there are sanctions for trespassing neighbors’ farms.
- Cutting brazil nuts is prohibited. In Posada, farmers are prohibited from cutting and burning brazil nut trees because the species is protected by the state.
- Deforesting in pristine and watershed forest is prohibited.

#### **Suggestions:**

Regulate the entrance of new partners to the company, to prevent localized population pressure on resources

Prohibit the cutting of certain key species, such as palms

Revive traditional techniques for swidden fallow agriculture, particularly the practice of maintaining palm species. In some traditional forest gardens, indigenous people cultivate and protect certain wild and cultivated species that are attractive to wildlife. These techniques can be recuperated for tourism.

Prohibit logging and provide incentives to protect certain microhabitats, such as bamboo patches, or succession areas of wild cane or palms that are provide important habitat for many wildlife species.

#### **Sanctions:**

- Decommission illegally harvested hardwoods and brazil nut trees
- Take away the farms of illegal settlers

### **Incentives and alternatives:**

Provide technical support for agroforestry and sustainable agriculture

Help ensure a market for products that are produced locally. This is a role the partner company can play.

Help develop valued-added products from standard farm and forest commodities people are currently selling.

### Hunting and Fishing: Rules, Sanctions and Incentives

#### Sanctions:

Decommission illegally captured species

Place a fine on illegally hunting. The amount and enforcement should be decided internally by the community

Loss of membership and rights to the receive benefits from the ecotourism association.

- Loss of right to work in the lodge for a certain period of time, depending on the gravity and frequency of the infraction.
- Loss of share of profits
- Infraction brought to the attention of the community before a public assembly
- Decommission hunting arms

#### Rules:

- Zoning for areas where hunting is prohibited
- Create management plan for wildlife that indicates what species, and what numbers of age-class and sex are permitted to be taken. Infierno is working on such a plan with Conservation International.
- Prohibit the hunting of key wildlife species particularly important as tourist attractions and not generally preferred as game meat anyway. These include giant otters, jaguars, rivers dolphins, and harpy eagles.
- Monitor and keep records on certain species, such as macaws, harpy eagles, and giant otters.
- Prohibit certain methods and destructive tools for fishing, such as barbasco, dynamite, and nets.
- Establish temporary prohibitions on hunting of certain species in breeding places and times. This would be especially helpful for protecting river turtles, for example.
- Always focus on raising awareness through various types of communication campaigns and programs.

### Incentives and alternatives

Be sure to create incentives for the people who report infractions of the rules. Otherwise people who report are perceived as mere tattle tales. There has to be some positive recognition that such behavior is actually a benefit to the community. How can we create the right incentives for people to report on each other as a public service?

Offer bonuses or rewards for finding new nests or salt licks or providing clues about where they might be found. Also, services for helping guides find such key wildlife habitats should be paid.

Provide adequate compensation or perks, such as diplomas, trips, binoculars, books, and the like to people who practice conservation, however defined by the company and community. Compensating people for conservation is controversial, but it can compel people to change their behavior.

Captive wildlife breeding is another option. It is technically difficult, both socially and economically. You always have to determine feasibility.

Finally, encouraging small livestock production, particularly chickens, is one added option to minimize need for hunting (though it does not eliminate cultural and social reasons people hunt. Protein is not the only factor to consider.

#### Fish farming

Fish management is something we have done little in the region. In some rivers and at certain times, we don't fish. It is a theme that requires much more attention in the coming years.

Promote the production of alternative products to sell in the lodge. Help create a demand for these types of products.

### *Discussion notes*

*Guest:* If the goal is to generate resources for communities, you mention that Posada would have a weekly demand of X amount of meat, instead of buying from a distant market, you buy from local people who can generate the production. It would be a sure market, and the lodges would have to be committed to buying from the communities.

*Rep. of Posada:* Any time of activity that you promote, at least in the beginning needs to be successful. Otherwise, you are going to lose credibility with the community, and ultimately you'll squander local initiative.

*Summary of group:* Before talking about rules, we should focus on education and raising awareness. In general, FINAE has used the term "processes of formation," before focusing on rules. The most important for management is zoning, to establish different norms of use in different areas—zones for strict protection, zones for tourism, and zones for agriculture and other subsistence and extractive activities. All three lodges have in place some form of zoning.

To manage hunting, Infierno is working in collaboration with Conservation International, to keep track of how many animals of each sex are being hunted, which species, and which species have high or low reproductive rates. This is perhaps a model that could be tried in Chalalan and Kapawi as well.

There is also a rule that is being applied in various places, and that is the total prohibition of hunting of certain species, such as the giant otter and jaguar, animals clearly important to tourism but especially valued anyway as game meat.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

A recommendation is to create different levels of sanctions, depending on the gravity, the species affected, the area where the infraction was committed (i.e., in a reserve or not), and whether the person is a member of the community or not. A person who is always violating the rules would be treated differently from a person who broke a rule for the first time. A fine is a kind of sanction that the Achuar are applying internally in their own communities.

*Chalalan:* In Chalalán, a person can lose rights as a shareholder in the company, if the case is very grave. But the solution is a danger too because that person can become someone who purposely tries to cause problems for the company.

Another sanction is prohibit people from working in the lodge for a certain period of time, perhaps for a month or two, if they break a rule. Taking away profits is a sanction as well. If a person kills an eagle, he can lose his share of profits.

*Kapawi:* As the FINAE is starting to talk about an ecological reserve, it is a theme that should be discussed during community assemblies and the word should be spread widely. As long as the information is lacking, people are not going to understand and won't follow the rules.

*CI-Ecuador:* Everyone has to be well informed to be able to respect the rules.

There are rules, sanctions, and management. Who is going to sanction, and who is going to define the rules?

*CI-Ecuador:* Communities should play that role. Depending on the gravity of the case, but the sanctions have to be defined by the community with help from the companies that have to keep their employees well informed of and in compliance with the rules as well. Companies have to inform their tourists as well. There are still tourists who come to these lodges hoping to hunt and fish. It's not enough just to say what the rules are, you also have to explain clearly why the rules are in place.

*Chalalan:* There was an experience that happened in our lodge. We were trusting the education and management team, but there are always people who want to take advantage of circumstances. For example, some workers found a turtle and they put it in a cloth bag in the boat so that it could be returned to the wild. But there was a tourist in the boat, and he say the bag moving. The tourist wanted to see what it was, and they told him it was a chicken. They arrived to Rurrenabaque and the tourist asked again to see what was in the bag. The tourist was totally surprised. As managers, we had to get involved, and once again the company incurred the costs of transporting the turtle again, with accompaniment by a park guard. They had to send an speed boat just for the turtle, and I had to go to the lodge to fix the situation and there was no one to send a bill to, and the company had to pay.

*Chalalan:* They gave talks and everything. But the point is to conserve and that has been very important, and the investment was worth it.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

*CI-Ecuador:* It makes no point to establish rules and sanctions if they are not going to be applied. People just start to lose faith.

*Kapawi:* It is important to follow through. If there are infractions and then no sanctions, that will be even more detrimental to conservation. Once rules are established, we should publish them, and we have to start at the very beginning to apply them. Otherwise people will ask, ‘Why me and not him?’ At the moment the rules are stated, the sanctions must be enacted as well.

### ***Management of Cultural Resources***

The three lodges have a wealth of cultural resources that include visits to the communities, handicrafts, traditional farms, medicinal plants, local architecture, and musical instruments, among many others.

It is important to note that for San Jose, Infierno y the Achuar territories, “the community” is also Chalalan, Posada Amazonas and Kapawi, respectively. What they show tourists in their lodges represents *culture* also. As the delegates of Chalalan said: “Tourism is one more activity among the many productive things we do. In fact, Chalalan is like one more chacra. We do not distinguish between Chalalan and San Jose. They are geographically in different places, but the lodge emerged from the vision of our community.

So when we talk about “management of cultural resources” for tourism, it refers to rules and codes of conduct, not just in communities but also in the community-owed lodges.

What message(s) do we want to convey to tourists?

Kapawi: “That the Achuar really live, and we are different from other groups.”

Posada Amazonas: “We consider ourselves conservationists. We have created areas to protect and manage nature. All of us have the idea of conserving.”

We tourists to understand our past and our present, and that the Ese’ija exist We want them to know that our community is comprised of two cultures, the Ese’ija y ribereño.

Currently the president of Madre de Dios fails to recognize the indigenous peoples. We [the Ese’ija] are so small in Peru and in Madre de Dios that almost no one knows about us. So we have been working for many years and now we have the opportunity with the company, and we want to share our Ese’ija identity. The lodge motivates us to go forward, both at the communal level, and and the regional and national levels. Almost no one knows us in Peru.

Chalalan: “We are an indigenous community that lives in harmony with nature. Thanks to nature, San José exists. We have a philosophy of conservation.

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

“The Aymara, the Quechua . . . a series of nationalities has emerged, there isn’t so much recognition, or it’s not noticeable the recognition of the state. Our situation is complicated like the Ese’eja. Also as a community, there should be some kind of solidarity to show who we are.

What cultural aspects do we want to show to the tourists?

Kapawi: Our everyday life: adornments, the feather headband, the paint on our face, how we make baskets, and how we drink chichi and guayusa. We try to represent the reality, as if the tourists were guests in our house and we were showing them photos. We also try to show the tourists things that make us proud as a family and community. No one obligates us to change our clothes—we prepare the same as we did before.

Posada Amazonas: Daily life of the Ese’eja as they live now. The visits to Infierno are only occasional, with special groups.

In the future, we would like everyone in the world to know about our culture that has been lost—our language and our traditional customs—so that people recognize and know us, not just the tourists.

Chalalan: Tourists visit only the schools, family farms, and handicraft shops in San Jose. In the future we want to give presentations about the community and our customs, including our legends, dances, traditional music, the coca leaves, the traditional meals. We want to show our culture through special walks focusing on medicinal and other useful plants.

What cultural aspects do we want to keep private?

Kapawi: The *aujmartin* (or traditional way of welcoming), the shamanism, our traditional dances, songs, and ritual fasting. These are sacred things, but they are also things that we cannot control in a certain way for tourists.

Posada Amazonas: We do not show the ayahuasca ritual because it cannot be controlled. It is not a traditional activity for the Ese’eja, but rather something we have learned.

We do not have visits to the community because of bad experiences in the past (i.e., unsolicited gifts to children). The tourists do not visit families, just the school and the community around it. Visiting families would be an invasion of privacy. We are not pieces in a museum.

We try to take care of our traditional knowledge because we fear that it could be used incorrectly or for profit.

Chalalan: We do not show families to the tourists. We have lost many of our rituals and customs like shamanism, so we can’t show them.

What cultural aspects do you find now that you almost never found before tourism?

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

Kapawi: Traditions like *aujmartin*, more handicrafts to sell, longer hair like our ancestors wore theirs. Before we hunted a lot, but now we are creating no-hunting zones to be able to show animals.

Posada Amazonas: Traditional handicrafts, such as fans and brooms, also new handicrafts we have learned, like carved figures.

Tourism has been helped rescue our identity. Before there was shame in having an *Ese'ija* name. But tourism is changing that.

In comparison to San Jose that is older than 400 years, we have been a community for only 30 years. We have been working for a long time at the level of indigenous organization, trying to revalue our identity. We are the only mixed community, and for an economic opportunity, a relief that tourism has given us . . . but it is not for tourism, but rather from a long time ago. We see an economic opportunity in tourism to make a reality of this idea we have. In relation to the idea that a person of the community who wants be identified as *Ese'ija*, we have no problem with that. It's for that reason that we want to recognize the languages, the songs, the history—for everyone in the community.

Chalalan: We have always made the handicrafts we are now selling to tourists.

Years ago, people abandoned San Jose, and today they are returning because of pride in the success Chalalan. Before, San José was a place of suffering; now it is a place of opportunities.

Many have left San José and later have seen the development. Now everyone wants to be San Josesano. It is a theme that we see, how people are attracted to economic activity. Everyone wants a piece of the pie.

#### **Codes of Conduct:**

- \* Know the limits
- \* Inform and ask permission before visiting a community or family
- \* Do not allow tourists to give gifts directly to the community during visits. This will help prevent conflicts. Gifts can be channeled through the lodge or an NGO.
- \* Educate tourists before a visit, not only about how they should act in the community but also about how they can support the community.
- \* Respect culture, which also means not criticizing local rules of the community, such as “do not take pictures.”
- \* Do not collect wildlife (flora or fauna)

Codes for members of the community when they receive tourist visits:

- \* Do not ask or beg things from tourists
- \* Determine what things should be shown, and what things no—it will vary across communities
- \* Establish rules for tourists to follow

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*CI-Ecuador:* What are the processes you follow to reach consensus about the rules or codes of conduct.

*Posada:* Our methodology does not contradict the norms of the tourism partnership when tourists visit the handicrafts workshop or school. But if a member of the community does works with tourists daily, it is prohibited because the resources of the community do not belong to individuals, but rather to all.

*Posada:* Here in Kapawi, they go to visit families directly. We don't do that, but rather the tourists go to the center of the community.

*CI-Ecuador:* In many places where both nature is the main attraction, tourists want to see culture. An approach that is used in other places is to set a place aside with special interpretation so that it is not a "show" and in that place, presentations about local culture are offered. That can be a solution for the three cases. It could be handicrafts store combined with an open meeting space, and something like that could help satisfy tourist demands to know and see more about local culture.

*CI-Ecuador:* These three communities have responded to the question, but you find the dilemma is the same as with so many ecotourism projects. Have you learned something to share with others, and it was surely not an easy or fast process. Tourism must remain authentic to appeal to tourists. It is a delicate matter to show culture without converting the presentation to a show from Disneyland.

## 4.8 Monitoring Impacts

In the last thematic discussion of the last Trueque workshop, which took place in Ecuador's Kapawi Ec lodge, the delegates discussed ideas and plans for monitoring. The original goal of Trueque planners for this discussion was for delegates from Posada Amazonas, Kapawi, and Chalalan to explain how they had established monitoring protocols in their respective operations and to present the kinds of results they were finding. Monitoring is an essential tool for understanding the progress (or failure) of ecotourism lodges to meet the three-way goals of profit, conservation, and community development.

Though all of the Trueque delegates agreed on the need to understand progress in meeting each of these ecotourism goals, most also conceded that they had yet to establish monitoring plans in their projects and/or gather any data. Therefore, "Monitoring" became the first theme in the Trueque in which delegates had few experiences or "lessons learned" to exchange with each other. Instead, the theme became an entrypoint for discussing why monitoring may be needed (and, for some, what "monitoring" is) and how monitoring could be conducted in the future. The results of that follow in this chapter are responses and discussions emerging from the following questions:

- ★ What is monitoring?
- ★ What is the purpose of monitoring?
- ★ What are 2-3 most important changes to monitor in each of the following categories:
  - Ecotourism Operation
  - Social Impacts
  - Economic Impacts
  - Environmental Impacts

### What is monitoring?

In the simplest of terms, monitoring is "*medir para saber*" or "measuring to know"

### What is the purpose of monitoring?

- To make decisions. Should we stay the course or change? i.e., After one year, we can determine that it is better to take 20 tourists to the blind or instead limit it just to 8-9 tourists, based on our monitoring of impacts on wildlife.
- To evaluate. Is our operation going well or poorly?
- To plan. If we don't know how we've done so far, we will not be able to know how we'll do in the future.
- To be more efficient and effective in all aspects of ecotourism.
- To check ourselves—are we are meeting our commitments to others and to ourselves?

Examples of things already monitored in the companies: client satisfaction, occupancy rates, travel agency sales, profit margins, personnel performance, etc.

*VOICES OF POSADA AMAZONAS*

*We do some monitoring already with the macaw and otter populations around Posada Amazonas. Throughout the year, biologists and volunteers monitor the numbers of species and individuals, their interactions and behaviors, etc. This is to check how the population is increasing and decreasing as well as how they are responding to tourist activities.*

*CI-Ecuador:* Monitoring is not something that happens just one time. It is a process for measuring positive and negative impacts over time, and so it must be periodic, rigorous, and systematic.

*Rep. of Posada:* What do you mean by “systematic”?

*Rep. of Chalalan:* There is a system for gathering information.

*CI-Ecuador:* If, for example, you’re asking tourists what they think about your lodge, you ask all tourists the same questions in the same way every time.

*Rep. of Chalalan:* The process is organized, with concrete indicators.

*Rep. of Posada:* That’s the ideal. For me, monitoring is like what someone from the community told me: “There are more capybaras. Every group who’s visited has seen a capybara. How many groups? About 13-15 groups.” That is not organized or systematic, but it’s monitoring of some kind anyway.

*Rep. of Chalalan:* If a community member counts twelve capybaras and reports it, that’s useful. Monitoring reduces the problem of subjectivity, but it doesn’t eliminate it. That’s why we need to try to be systematic.

*Another rep. of Posada:* They [community members] live from this. When you live from something, you’re aware of it on a daily basis. Your success in tourism depends on this.

*Rep. of Posada:* The next question would be: “Have all of the guides seen more capybaras, or just you? The ideal situation for systematic monitoring in Tambopata is impossible because resources are so limited. But just because we can’t perform the ideal doesn’t mean we should ignore monitoring altogether. We have to use the resources we have, including subjective and anecdotal reports.

**Things we should monitor:**

- Health of wildlife populations, especially those important to tourism
- Satisfaction of tourists
- Satisfaction of local population
- Satisfaction of lodge staff
- Costs of operation
- Occupancy rates
- Profits
- Cited “high” and “low” points of tourist visits

**Monitoring across four themes:**

- Ecotourism Operation
  - Wildlife encounters

- Fulfillment of expectations
- Social Impacts
  - Local understanding of the ecotourism operation (and connected conservation and development efforts)
  - Improvement in infrastructure
  - Improvements in quality of life in the community
  - Skills gained by the community members and staff
- Cultural Impacts
  - Revalorization of cultural traditions
- Economic Impacts
  - Cómo gastan los comuneros sus utilidades
  - Reinversión de utilidades – proyectos alternativos
  - Environmental Impacts
  - Calidad de agua
  - Manejo de residuos

#### **Who should do the monitoring?**

- Internally in the company
- Community members
- Guides
- Voluntarios
- Investigadores
- ONG's, universidades

#### **Tourism Operation: most important to monitor?**

- Tourist satisfaction (indicators might include a) quality of service, including transportation, logistics, food, guiding, and interpretation; b) meeting expectations created in marketing materials; c) changes in knowledge, attitudes, and behaviors with regard to conservation)
- Changes in the environmental management (i.e., indicators might be kilos of trash per visitor, energy and water consumption per visitor)
- Profile of visitors
- Rotation of staff
- Number and quantity of community products consumed at lodge

#### **Social Changes: most important to monitor?**

*Impactos (+/-) del ecoturismo en la vida de la gente local (Kapawi, Asociación y FINAE; individuos, familias, comunidades, asociaciones, la federación)*

Indicadores: a) cambios en roles de género y edad; b) grado de apropiación, por encuesta; c) empleo--seguridad, capacitación; d) calidad de vida, en términos de salud, educación, emigración, violencia, alcoholismo; e) cambios en conocimiento, actitudes, prácticas y revalorización cultural

*Impactos (+/-) del ecoturismo en la FINAE y Asociaciones*

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Indicadores: a) fortalecimiento organizativo; b) confiabilidad administrativo y financiera (auditorías); c) ingresos; d) cambios en conocimiento, actividades, prácticas

*Gestión ambiental de la empresa*

Indicadores: basura, agua, energía

*Conocimiento del proyecto*

Cómo? a) por encuesta; b) actas de asamblea y del Comité de Control (ver como cambian los temas)

*Capacidades del staff, guías, artesanos*

Indicador: evaluaciones de jefes

*Tareas cumplidas del Comité de Control, los comunicadores*

Indicador: satisfacción registrada de la comunidad

Nota: Cómo medir la satisfacción?—con una “la encuesta perfecta” (el “termómetro”) y por quejas en acta

*Desarrollo de la comunidad en salud*

Indicadores: a) grado de alimentación; b) servicio básico; c) mortalidad anualmente

*Desarrollo de la comunidad en educación*

Indicadores: a) grado de instrucción; b) idiomas en que enseñan; c) comité de padres de familia anual

*Cambios culturales*

Indicadores: a) valores, ritos, genero, costumbres, danzas, fiestas; b) acceso empleo; c) participación en la toma de decisiones.

Nota: Difícil de monitorear por la perspectiva cualitativa.

## **Economic Changes: most important to monitor?**

*Beneficios a la comunidad Kapawi, las Asociaciones y la FINAE*

Indicadores: a) ingresos, inversiones y gastos; b) calidad de vida; c) vida económica de la comunidad—que se gana de ganadería, agricultura, turismo o una mezcla; d) inflación

*Resultado financiero de inversionista*

Indicadores: a) balances, estado de perdidas y ganancias; b) numero de visitantes

*La mejora de calidad de vida en la comunidad con la actividad turística*

*Qué tipo de ingresos había y para qué?*

Indicador: Ingresos de la comunidad vs. Ingresos de turismo

Nota de la discusión: Un miembro de la comunidad gana de artesanías, y un miembro es guía que gana diferente tipo de ingreso, y un comunero que no trabaja en la empresa pero se dedica a su actividad cotidiana y tiene otro tipo de ingresos. Es importante diferenciar los que están involucrados y los que no están involucrados.

*Uso de utilidades*

Cómo? Por a) encuesta usada por los comunicadores de la comunidad, y b) también por observación física, visual (por los comunicadores)

*Las utilidades que gasta el socio*

Cómo? Hacer consulta una vez por año. Quiénes? La empresa y OTB

*La inversión social en salud, educación y otros de fondos propios y externos*  
Quiénes? La OTB

**Environmental Changes: most important to monitor?**

1) *Impacto (+/-) del ecoturismo en el medio*

Indicadores: Abundancia relativa y distribución local (especies atractivas para el turista, especies que sean indicadores de hábitats, registro de especies)

2) *Impacto (+/-) de las comunidades locales en el medio*

Indicadores: Abundancia relativa y distribución local (especies atractivas para el turista, especies que sean indicadores de hábitats, registro de especies)

Nota: Registro de especies es parte de la investigación, complementario al monitoreo.

3) *Datos climáticos*

4) *Calidad agua (Laguna Kapawi)*

1) *Lobos*

Indicadores: a) la cantidad de turistas por día y cantidad de catamarán que visita el lago vs. b) cuando llegan los turistas, hay que saber si los lobos hacen una alarma c) también hay que medir la cantidad de avistamientos. Quiénes lo harían? Los guías

Nota de las discusiones: En el primer año, habían 11 lobos, dos años después habían solo 8. Después de madurez, el macho dejó la familia, o fue que algún cazador lo haya matado. Pero tiene que haber un proceso de monitoreado y investigación sobre qué es lo que esta pasando con esa población.

2) *Lago*

Indicadores: a) Cantidad de chacras (porque va a significar la calidad del ecosistema donde se encuentra los lobos y la cantidad de bosque alrededor del lago); b) Cantidad de peces pescados y sus tamaños; c) Cantidad de avistamiento de individuos

Quiénes: Comuneros y comunicadores de la comunidad (mas que los guías por que son ellos que tienen mas facilidad de ver nuevas actividades de chacra por sus vecinos)

3) *Eventualmente habrá que monitorear*

collpa de guacamayos, nidos de águila arpía, ronsocos, basuras y aguas, shihuahuaco, aguajales, chacras

1) *Monitoreo de avistamiento de fauna*

Parabas (guacamayos), lobo gigante, águila arpía, jaguar. Formularios ya existen, realizado por los guías en cada salida con turista) *Monitoreo de cacería*

Cómo? con encuestas y formularios. Monitoreado por? Auto-monitoreo y voluntario, podría hacerlo por la empresa

3) *Monitorear aguas*

Cómo? llevar muestras cada 6 meses a la Paz. Lo haría la empresa.

4) *Crecimiento y reducción frontera agrícola*

Indicadores: numero de hectáreas por persona, tipo de cultivo, tipo de bosque

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**Notas sobre: Quién haría el monitoreo y cómo?**

- ❑ Internamente (la empresa) y auditado por externos
- ❑ Voluntarios y profesionales
- ❑ Empleados (Ej., guías)
- ❑ Convenio con ONGs y universidades
- ❑ Investigaciones locales y empleo

Diseño de programa de monitoreo: criterios, indicadores, análisis, reporte

Financiamiento (\$)

Capacitación

Difusión

Asistencia técnica a través de alianzas: análisis y difusión

## Chapter 5 Exchanging Ideas

The long-term sustainability of this project will depend on the extent to which community representatives who participated in each of the workshops incorporate what they have learned into their own projects and also share their experiences with others. Following each of the workshops, the project team returned to each site to facilitate the sharing information from the workshops and discussion of key concerns and questions in community settings.

"The service in Kapawi in some ways was superior to than that of Posada. And [one of the delegates from Posada] noted when he saw his room: "OK, your lodge is one and a half stars better than mine." (JT, 6/17).

### 5.1 Ideas Gained from Posada Amazonas

The Ecotourism Comité: "These are people from Infierno who work with a person who serves as mediator between the private company and the community. This seems very important to me, and it is something we should try in Kapawi" (AR, 6/16)

"What impressed me about Posada was the aspect of gender, the capacity, the involvement and participation, and the decision-making that women have in that Project. I see a high participation in all of the areas, including in the ecotourism committee, which is the influential entity in that project" (BP, 6/16).

"Something I learned from Posada was the importance of a mediator between the company and the Community. Also, it is interesting how they manage data related to the quantity of wildlife they see on each trip. We have that system here too [Kapawi], to register how often, the number of animals . . ." (JM, 6/22)

"I think the partnership model they have in Posada is much more viable than Kapawi's. They have a partnership with the community of Infierno, and we have a concession and we've realized that it is much nicer for both to have a partnership rather than a concession. Because the concession is "tanto pegajoso desde lejos." The work for the Achuar has always been a bit easy, no? We are paying the rent, we are taking care of the territory, but the end is that we are not, because of the model, we have not been able to teach the Achuar to make the project their own. Also, because there are so many communities involved, different from Posada, which is involved with just one. I also think it's interesting for future projects to know that you probably can't work with so many communities. Maybe it makes sense to work with just one, because in the end, ecotourism is not the solution for all problems. This is one of the principle things I learned in Posada. The partnership they have is interesting because you can tell that the community members there are very involved in the project, they feel it is theirs, and of course, they suffer

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when there are no returns. They don't have just the benefits (but the costs too). They did not give them the fish; rather they taught them how to fish. Unfortunately, we from the beginning in our model did not have the opportunity to teach them to fish. Now they are accustomed to receiving the fish directly. That can be a limitation for us, which we learned from Posada" (JT, 6/17).

"A strength of Posada is their guides. They invest a lot in the guides course, and they have a big contingency of guides. Of course, that's also related to the flow of tourists, which tops 5,000 per year vs. 1800 in Kapawi. That's a big difference, but they give a lot of support to their guides. Why? Because they think guides are the key to the success of their guests' experience, and that's true! If you focus on giving good training to your guides, you'll motivate them more, and that's key to keeping the tourists happy, and having their expectations met" (JT, 6/17).

## **5.2 Ideas Gained from Chalalan:**

"The most interesting thing about Chalalan is to see an indigenous group assume full managerial and empresarial responsibilities. This too is something we should copy, but with time" (AR, 6/16).

"What I saw in Chalalan is that the community-level management is very mature, professional. And I say that in immediate comparison with FINAE. I see that they are still premature in their administrative and managerial capacity for ecotourism. So, what has been important to me has been learning the skills they generated [in Chalalan] at a local level to manage the lodge, the appropriation of the Project, to feel it is their own" (BP, 6/17).

"The community is 100% competent in managing the business, and just listening to one of the community leaders, he talked like a business person" (BA, 7/27)

"In Chalalan, I saw that they really know how to manage their lodge, either in losses or gains, but they manage it for themselves" (ED, 7/25)

"Something I liked about Chalalan is that they have a positive attitude about making their own mark. They designed all of the houses, and they did it in the way they wanted. I also like that they say, if I want something, I have to sacrifice, I have to work. And many times they did not work for immediate pay but knowing that in the future they were going to benefit. So, the good is that they worked with their own sweat, not for money" (OA, 7/26).

"In Chalalan, I've seen that the community members are very involved in managing the lodge, they are businesspeople, and they are community members who are learning. They are villagers who have the courage to say to someone of another company, 'look, you have the strength in some things, but you also have weaknesses.' They have that ability, and they all of the ganas to take the company forward. They have know how to define who is a partner in the company. They distribute benefits well to the partners, and for the Community itself. So, that ensures that all of the community benefits, but also that the partners in the company benefit a bit more. I think that makes sense for this type of project, for example, in Infierno, it's not like that. In

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Infierno, everyone shares equal part of the benefits from the company, even though, for example, some people are hunting in the reserve. So, they have problems that you don't find in Chalalan. It could be the difference between the two reserves in each community. You see animals [in Chalalan] You know, we saw a sloth 10 meters from the lodge. Incredible! Later, monkeys. The quantity was impressive" (JG, 7/16).

"That there are there beside the lake is beautiful. I think that is one of the most beautiful aspects of Chalalan. Also, I liked the cabins a lot, their pretty, clean. In contrast with Kapawi, which is more authentic because it looks like an Achuar home, but I saw it looking a bit more run-down than Chalalan" (JG, 7/16).

"The partnership with CI-Bolivia, who oversees everything [is positive at Chalalan]. But negative is not having a program for transferring know-how, especially in marketing, more in-depth skills in administration, because that has been one of the difficult things for them—well, maybe not in administration, but definitely in marketing. It's critical for tourism" (JG, 7/16).

"In Chalalan, I was surprised by the efficiency. The personnel work really hard. Here [at Kapawi], we are very comfortable, we have a big staff and don't work as hard as they do. So, something that seemed very important to me was the process of training. It has to be continuous. Here in Kapawi the training is continuous, the rotation, there is too much rotation, the territory is too big. So, I think ecotourism has to be more localized so that people's participation is much more active, and the training is real" (JM, 6/22).

"The interesting thing about Chalalan is that it is managed by the community members. That's really notable" (JT, 6/17).

"The other thing about Chalalan that called my attention is the wildlife. I know that tourists have a lot of opportunity in Chalalan to see wildlife, much more than in Kapawi, and more than in Posada also. We have to do something to start to have that here [in Kapawi].

"Most impressive for me as a member of the community was the experience and training and knowledge of the leaders and staff who work in Chalalan, and there they are indigenous too! and they also the capacity to invest, in training themselves before getting involved in tourism" (JP, 7/16).

"We [the delegates from Posada] also learned a lot about management at the community level. Bolivia has a good experience, so many more years of preparation, . . . we learned some things that we can apply in our own community, such as how to distribute profits. In Chalalan, not everyone benefits, and it depends on the rules they have. That's different from us. In Infierno, everyone benefits, whether or not you work. And that's not fair, right? We are working all the time, fighting for development. In the case of Ecuador, the company is not just with one community, but a federation. The most memorable for me from that case is that they are able to distribute benefits among so many" (JP, 7/16).

“What I learned is the importance of differentiating the entrepreneurial from the communal. In a company you have to apply strict rules for developing the company, without help from other organizations or countries. Those strict rules are more difficult to apply to a community. If someone fails, they don’t come to ask forgiveness, or if a community member or half of them don’t do anything in the community, and don’t apply sanctions. Everything goes as normal. In the company, if an employee fails, he doesn’t work, or doesn’t do his job well, that goes against development, against benefits, and against everything. I’ve learned that more community members should learn to differentiate between the company and the community. That’s very important, and it’s something that we should teach and share widely to the community, as an lesson we’ve learned from other communities” (JP, 7/16).

“In Chalalan, they are inside the National Park of Madidi, and we are inside a communal territory, we are 500 people and the other company is inside a communal reserve that has 2,000-3,000 hectares. But the fauna, the animals inside the reserve have been and now are threatened (but now less than before). But with the lodge, we have seen that the area is repopulation with animals, and they are protecting the Amazon forest. In that part, Chalalan has much more than Posada, much more than we do. Their wildlife is very close” (JP, 7/16).

“At the level of the company, there are a few differences—their infrastructure is smaller, but maybe better preserved, with other materials, a bit more technique. And the most memorable is that all of the personnel is their own people, purely from the community managing the lodge, at the logistic level, guides, administrators, in the town of Rurre, the sales administrators. The accountant is not from the community, but everyone else is. That’s memorable for us” (JP, 7/16)

At the community level, they also have a lot to teach us. The level of their organization, the level of leadership, they have a capacity very advanced, very strong to manage development, and that is great, very good that we have been able to learn from them. Like I said, there are many rules that they apply so that their community, all members respect, and that benefits all. Really, I don’t have much negative to say of what I’ve seen in Chalalan. In Bolivia, I was able to learn more things that can be applied communally and entrepreneurially in the future” (JP, 7/16).

### **5.3 Ideas Gained from Kapawi**

“I learned to value the community. For example, I learned a lot from the Achuar. You can see how they value their community. You should respect your resources, you should respect your language, your culture. They respect theirs. We talked about that, they told me, we have to be this way because a lot of people abuse, they say we don’t know anything because we are natives, so we have to respect ourselves as we are, and so that left an impression on me, and I would like to be like that. I was born and raised in the community. All of us can work. That’s the way we are, now that the community is integrated, whether we called ribernhos o Ese’ija, but we should work as a community. So, the Achuar impressed me because they never say they are not Achuar, they are content to be Achuar, they are of their community. They make people respect their community. So that impressed me a lot because, for me, to hear they talking their language, and I didn’t understand, that was the first time I went to a community where they do speak their language. And there the people are united, and they work; they work to help the people. Not

only saying, 'I'm benefiting, it's my money, I alone am winning.' So, they carry their culture and they respect their culture and their indigenous life as it is. I wish we had this in our community" (ED, 7/25)

"In the lodge [Kapawi], I saw that the personnel are very attentive because there are no women, only men. They are very attentive, always at your service, they offer things and ask if you are in need of anything, if you are comfortable, how you like the food. Because when you go to Kapawi, you are a guest" (ED, 7/25)

"A good thing about Kapawi is that they continue to be part of nature. They live their culture. For example, something they said is that they feel rich, not because they earn money, but because they have always had everything at their reach. That's something I learned from them, despite everything, they still ascribe value to things in their environment. It is a bit different for us. And that's a question they asked us--why don't we feel rich? They wanted to know that. We said, well, we feel a bit rich because we are earning income from tourism and because there are possibilities to buy things now. But in reality, maybe they're right, no? In reality, it is like they say. If you are sick, and you know nature, you know medicinal plants, you can go and get a plant and you have medicine. That something I liked about Kapawi" (OA, 7/26)

"Despite what they say about being rich, if we don't conserve what we have, at least a portion, we'll use it until we finish everything we have. For example, the Achuar have very little fauna left because they hunt so much. They do not control how much they hunt. They would be much richer if they hunted in a controlled manner" (OA, 7/26).

"What I liked in Kapawi is that they show much of their cultura. That seems super important. Also, they were very effective at managing resources, using solar energy, recycling, and their solid waste" (JG, 7/16).

"What is still lacking in Kapawi is community participation in the lodge. The fact that they receive a fixed monthly rent, and that they do not have incentive to worry about things is a problem for the lodge. It's a point that simply goes against the project. Also, the fact that the community does not have rules about hunting near the lodge, or sanctions against the people who means that you practically don't see fauna at Kapawi. You see dolphins, which the Achuar do not hunt, and the hoatzins which they also don't hunt. Very little after that. Hunting is still very much a part of their lives" (JG, 7/16)

*[Interesting irony here: everyone loves that culture is intact among the Achuar, but we want them to eliminate or severely restrict a key aspect of the cultural identity, which is hunting.]*

"[Another weakness at Kapawi] is the fact that the partnership with a federation, which includes 50 some communities, and the benefits are divided among all, and they're not tangible for most" (JG, 7/16).

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“Another good point at Kapawi is the training—if someone received training, that person then trains the rest. It’s much easier if someone of your same culture teaches you than if someone from outside does” (JG, 7/16)

“A negative thing about Kapawi, is hunting continually, or hunting around the lodge, and around the activities of the lodge affects the business, the business goes down. So, this is a point where we must maintain a high level of conservation, protection, and respect, more than anything, in agreement with tourism so as not to affect the company, right? That was very clear to us, that in Kapawi there are still rules that exist only in writing, but they are not applied. That’s an important theme for us” (JP, 7/16).

“That’s another point especially important for us, as a point to put into practice so that our culture, we the Ese’ija who are in the community of Infierno, so that our culture is real, not simply that the Ese’ija exist in Infierno, but that we don’t practice our culture. That’s a really important point, the cultural values, in Kapawi, their culture is alive, and that’s really good” (JP, 7/16)

## CONCLUSIONS AND RECOMMENDATIONS

"What I learned is that these kinds of projects we promote are very dynamic, and everyday we are learning something. Nothing is a given in community-based ecotourism, it's a new path we're beginning, but nothing is fact. We are, as part of the Trueque, creating certain guidelines to teach to the rest of the world about how to do community-based ecotourism, but as the pioneers, I think we have a lot to learn still. I think in each workshop we learned more of our possibilities" (JT, 6/17).

## **PARTING THOUGHTS AND NEXT STEPS**

And finally, some parting thoughts on what people say they plan to apply to their own work, plus future plans for working together.

“I would really like to see in a few years the same people come back and see how it’s going. Like Chalalan has already been 100% transferred to the community, but Posada hasn’t, and Kapawi, I don’t even know if they’re considering it. It would be nice to come back in the future, and see how far along they are in that transfer, and also to see if, Chalalan is working right now, to see if it is still working in the future” (BA, 7/27).

“I think the most important point, in general, for change in Kapawi is that when we apply all of the concepts and processes, that we should not say ‘transfer,’ but rather maturation. In Kapawi, we don’t have this. In Chalalan, it’s already happened. In Peru, they are in the process, not necessarily in ‘transferring’ but in ‘maturing.’ Right now, the company [of Kapawi] is quite separate from the federation [of FINAE]. But, with what we learned in the Trueque, we will be able to begin a process of maturation” (AR, 6/16).

“We will take the idea of the mediator, a neutral person who serves as link between Kapawi and the federation. The second idea we’ll take to Kapawi is the idea of getting the federation more involved, as are the communities in Peru and Bolivia. The federation needs to understand accounting, how the market works, and more about business matters in general. The Achuar communities simply receive benefits, but they do not understand business, the losses, the gains, the complications. And so, their attitude is very relaxed. When they were in Peru and Bolivia, they saw how people see the day to day reality and how things really work (AR, 6/16)

From the perspective of Pachamama, I want to support th”e strengthening of the alliance between the Achuar and Canodros, not necessarily so that they get to a point of transfer, but so that their partnership matures. So that when the time ends, the partnership does not end but rather evolves to something new” (BP, 6/17)

“One of the things I learned is that cotourism is expensive, and community-based ecotourism has been a very expensive investment for these guys, in terms of dollars, investment of time, so it’s not something as an NGO working in a reserve zone or an area that we want to preserve, ecotourism is not necessarily the answer. It could be one of the answers, or it could be part of the solution, but just trying to think of everyone putting in their ecotourism lodge, it just doesn’t work that way. So when it comes to planning for the future, in terms of ecobusiness and ecological enterprises, which is what I do, ecotourism is already here. It would be very difficult to bring in new lodges and give new opportunities to different groups of people in terms of just putting up a lodge. It just doesn’t work that way. . . . You can’t have 50 ecolodges in one place, so in terms of a response to conservation threats, it’s not the solution, it’s a very small part of the solution: (BA, 7/27).

“What I learned was that, I used to not think community-based ecotourism was possible. Not that it wasn’t possible, but I used to have this image that the business is the bad guy, or the business is coming away economically losing, and it doesn’t have to be that way. So that was probably the most interesting aspect for me. That’s what I learned” (BA, 7/27).

“My favorite memories are of the exchanges with between different communities. Infierno is a Community close to the city. In Kapawi and Chalalan are very far and difficult to reach, only by small plane. It takes 7-8 hours to get to Chalalan by boat. Here [in Infierno], we know the city, we can go there anytime. People go back and forth in cars, it’s easy for us. We are, pucha, already known, they even say that, that now we are not “la gente” we have lost what they call native, and now we are, how can I say, in a more civilized life than what they have in Kapawi. So, we are more integrated, so Kapawi left me with a big impression. I wondered, when are we going to get there? When we arrived, I saw how small was the lodge, the people, and they couldn’t understand, so I stopped asking questions because why would I ask what they cannot answer?” (ED, 7/25)

“Even before the Trueque, I had the idea to change the way I work. Now, with the Trueque, I will change even a little more, no? I would like to be more involved in conserving what is in Posada, and I like a lot what I’m doing now [handicrafts]. Before I had my chacra, and now I’m making handicrafts, and so I don’t have much time for my chacra. But it’s a shame to leave everything. Maybe if I earn a bit more money, I could manage both things, but it’s a bit difficult, because the money does not reach. It’s only enough for food and all that, no? It’s not even to pay a person to manage my chacra, but now that I’ve gone to the Trueque, now I have more interest in working in Posada, no? Maybe as a worker there I could earn more income, and I’d learn more what it feels like to work in the lodge. But we’ll see. I would also in the future like to create my own guests houses, maybe in my own area and work with Rainforest. I could build the guest house, and maybe tourists would like to spend the night, no? That’s why I want to keep my plot intact, no? Not destroy much. And maybe someday some tourists would like to spend sometime near the community. Maybe they will want to visit community members and stay nearby. These are ideas I have, but maybe Rainforest would not like them. But everything can happen someday” (OA, 7/26).

“What I learned is that communities can do many things put before them. But if they see benefit in it. If you tell me, ‘it’s good do to this,’ but you don’t show me the benefits, I won’t do it. We have to show benefits because no one is going to anything just out of goodwill, not because it’s pretty. People want benefits, and if there are no benefits, they won’t do it. I learned that ecotourism is working for species conservation. En the case of Chalalan, in the three cases, they are rescuing local culture, and people feel prouder to be native. What we saw is that culture was practically asleep. It changes through tourism, when culture began to be felt, and there was a revalorization: (JG, 7/16).

“I have been trying to change things in Kapawi, but things are not going as I had hoped, maybe because the project is so big, and because of lack of communication, lack of money, the lack of ganas in the community . . . but I came out of the Trueque very motivated. I had many ganas to do a lot of things, and after, to implement more because before we were collecting data on

TRUEQUE AMAZONICO:  
Chalalan, Posada Amazonas, Kapawi

wildlife and birds. I also wanted to start a process of communication with the Achuar, at a level of leadership—there are many decisions the Community should make and not us as the private company to resolve the conflicts we have. One of the main problems at Kapawi is the dialogue. I wanted to open dialogue, but unfortunately, there were some problems that meant the leaders of FINAE were not able to participate in all of the workshops. They really don't give importance to Kapawi. It's frustrating to try to implement the lessons learned in the Trueque. Meanwhile the company is worried about making a good return on their investments. So we have tried, but we have not been able to create the space in which to reflect and make joint decisions" (JM, 6/22).

"I also learned how to improve my relations with the Achuar, because I learned much more about the cosmovision of other communities, which is similar to what we have in Kapawi. They were raised in a similar environment, they have similar ways of life, . . . Also, I learned how to take the strengths of other projects and apply them here, and I think the other projects will do the same" (JT, 6/17).

"I've learned to understand our partners, the Achuar, better. We have different backgrounds, visions, . . . but I learned more about them because I participated with them. Normally, in your work, you don't sit and listen to how a person thinks, you just give orders, or just talk strictly about work, not listening to the other person. The Trueque helped to forget about other work and focus on how they think because we talked in certain themes, and everyone had a different point of view, related to their vision, their perspective, and that was very interesting. Sometimes they gave suggestions, and some ideas that really impressed me a lot" (JT, 6/17)

"Something I would like to do is share this experience at the level of Madre de Dios and also at the level of the indigenous federation because other companies are trying to do this work of ecotourism in their territories, but I have seen that they don't understand, or maybe they don't want to ally themselves, join with some friends or with a private company. And those projects are not very efficient. So, I want to share with them how they can organize themselves better to move forward. So, first, I want to share at the community level, and then at the regional level and with other communities" (JP, 7/16).

## Glossary of Acronyms and Terms

<b>APA</b>	Albergue Posada Amazonas
<b>Achuar</b>	Indigenous group in Pastaza region of Ecuadorian Amazon; partnered with private Ecuadorian company, Canodros to create and co-manage Kapawi
<b>Aerosentsak</b>	The Achuar-owned and operated air transport company.
<b>Albergue</b>	Spanish for “lodge”
<b>Bahuaja-Sonene</b>	National Park in Madre de Dios, Peru; Posada Amazonas is in buffer zone park.
<b>BID</b>	Spanish acronym for Inter-American Development Bank
<b>Canodros</b>	Private Ecuadorian tourism company, partnered with Achuar federation, FINAE, to create and co-manage Kapawi.
<b>CC</b>	Comité de Control, or the community Ecotourism Committee that represents the Native Community of Infierno in the management of Posada Amazonas.
<b>Centro Ñape</b>	Medicinal plant garden and locus of cultural revalorization projects among Ese’eja in the C.N. of Infierno.
<b>CEPF</b>	Critical Ecosystem Partnership Fund, consortium of MacArthur Foundation, Conservation International, World Bank, GEF, government of Japan; funding source and sponsors for the Trueque Amazónico.
<b>CI</b>	Conservation International, non-governmental environmental organization, based in Washington, DC; partnered with San Jose de Uchupiamonas to create Chalalan Ecolodge; co-sponsored the Trueque Amazónico.
<b>CNI</b>	Native Community of Infierno, in Peru, local community partnered with Rainforest Expeditions (RFE) to create and co-manage Posada Amazonas
<b>Comité de Control</b>	Ecotourism Committee that represents the Native Community of Infierno in the management of Posada Amazonas
<b>Ese’eja</b>	Indigenous group for whom CNI is native territory; partners to Rainforest Expeditions (RFE), with riberenhos in community to create and co-manage Posada Amazonas.
<b>Faena</b>	Communal work party

<b>FINAE</b>	Interprovincial Federation of the Achuar Nationalities of Ecuador; Achuar indigenous federation that is partnered with the private Ecuadorian company, Canodros, to co-manage and benefit from Kapawi.
<b>Hotel</b>	Local reference for the Kapawi Ecolodge
<b>IDB</b>	Inter-American Development Bank, invested in San Jose de Uchupiamonas for five years to construct lodge, build human capital, and support staff and management training for the Chalalan Ecolodge.
<b>Infierno</b>	See also CNI, local community in Peru partnered with RFE
<b>Lodge</b>	Refers either to Chalalan or Posada Amazonas
<b>Madidi</b>	National park in Bolivia; Chalalan located in this park.
<b>Minga</b>	Communal work party
<b>NGO</b>	Non-governmental organization
<b>OTB</b>	Organizacion de Territorios
<b>Pachamama Foundation</b>	U.S.-based non-profit organization that supports indigenous rights in Ecuador, and FINAE in particular
<b>PEM</b>	Puerto Maldonado, capital of Dept. of Madre de Dios, Peru and gateway town to Posada Amazonas
<b>Pokachá</b>	The “ideal” ecolodge, co-created and imagined by the participants of the Trueque Amazónico that combines the best elements of POsada Amazonas, KApawi, and CHAlalan.
<b>RFE</b>	Rainforest Expeditions, private Peruvian company, partnered with the Native Community of Infierno to create and co-manage Posada Amazonas.
<b>Riberenhos</b>	
<b>Rurre</b>	Abbreviation for Rurrenabaque, gateway town to Chalalan
<b>San Jose de Uchupiamonas</b>	Quechua-Tacana community, in Bolivia, partnered with Conservation International-Bolivia (CI) to create Chalalan; now owns and manages the lodge autonomously.

## Satellite

**Projects** Community development initiatives that complement ecotourism, including handicrafts cooperatives, medicinal plant gardens, etc.

**TCO**

**Tres**  
**Chimbadas** Name of oxbow lake in C.N. Infierno, home to family of Giant Otters, a key attraction at Posada Amazonas

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**Encuesta para Comuneros de Kapawi, Chalalan, Posada Amazonas**  
*“Learning Host to Host: Ecotourism Exchanges in the Tropical Andes”*  
 Critical Ecosystems Partnership Fund

No. de Ficha: \_\_\_\_\_

Fecha: \_\_\_\_\_

Entrevistador: \_\_\_\_\_

**I. Hogar**

Nombre	Sexo	Edad	# de años de Educación	Lugar de nacimiento	Afiliación Étnica	Idioma(s)
(entrevistado)						
(esposo/esposa)						

1. ¿Cuántas niños tiene? y que edades tienen?

2. Tiene hijos estudiando afuera de la casa o comunidad?

3. ¿Cuántas personas viven en este hogar permanentemente? Adultos \_\_\_\_\_ Niños \_\_\_\_\_

4. Tipo de hogar: Familia nuclear \_\_\_\_\_ Familia con abuelos \_\_\_\_\_ Dos familias \_\_\_\_\_ Padre/Madre soltero \_\_\_\_\_ Otro (explicar) \_\_\_\_\_

[En el caso de vivir con abuelos, dos familias u otros]

Nombre	Sexo	Edad	# de años de Educación	Lugar de nacimiento	Afiliación Étnica	Idioma(s)

**II. Producción Agrícola**

<i>Cultivo</i>	<i>Tamaño en hectáreas y Cantidad</i>	<i>Que hace con el producto?</i>	<i>Ganancia año pasado</i>

<i>Cultivo</i>	<i>Tamaño en hectáreas y Cantidad</i>	<i>Que hace con el producto?</i>	<i>Ganancia año pasado</i>

5. De que manera se diferencia su chacra/chaco de otros de la comunidad?

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6. A que distancia se encuentra su chacra/chaco de su casa

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7. ¿Qué va a sembrar con su chacra/chaco el proximo año?

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Esquema de la Chacra:



**III. Animales**

	<i>Numero</i>	<i>Que hace con el producto</i>	<i>Estimada ganancia en un año</i>
<i>Gallinas</i>			
<i>Patos</i>			
<i>Ganado</i>			
<i>Chanchos</i>			
<i>Chivos</i>			
<i>Otro</i>			

**IV. Extracción**

8. Cuales son los productos mas comunes que trae del monte?

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	<i>Que hace con el producto?</i>	<i>Estimada ganancia de un año</i>
<i>Castaña</i>		
<i>Aguaje/Palma Real</i>		
<i>Ungurahui/Majo</i>		
<i>Palmito</i>		
<i>Jatata/Crisneja</i>		

**V. Caza**

9. Cuál es el animal preferido para comer? \_\_\_\_\_

10. Cuándo fue la ultima vez que lo comió? \_\_\_\_\_

11. Ud caza algún animal? si ( ) no ( ) Cada cuanto tiempo?

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12. Hay lugares donde no se caza? si ( ) no ( )

Dónde y porque?

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13. Cuáles son los animales que no deberían cazar? \_\_\_\_\_ Porque?

**VI. Pesca**

14. Cuál es el pescado preferido para comer? \_\_\_\_\_

15. Cuándo fue la ultima vez que lo comió? \_\_\_\_\_

16. Ud pesca? si ( ) no ( ) Cada cuanto tiempo?

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17. Hay lugares donde no se pesca? si ( ) no ( )

Dónde y porque?

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18. Cuáles son los peces que no se deberían pescar? \_\_\_\_\_ Porque?

**VII. Valorización de Animales**

19. Organiza los dibujos de alguna manera que tiene sentido para Usted.

[Entrevistador: escriba la organización de códigos aquí]

20. Porqué los organizo así?

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21. Cuáles son los tres animales mas importantes para:

a) su familia i) \_\_\_\_\_ ii) \_\_\_\_\_ iii) \_\_\_\_\_

b) los turistas i) \_\_\_\_\_ ii) \_\_\_\_\_ iii) \_\_\_\_\_

**VIII. Fuente de Ingreso**

22. A que se dedica para ganar dinero? [Entrevistador: Hacer una lista de todas actividades mencionadas. Si habla de madera, minería u otra actividad no incluida en la encuesta, pregunta por mas detalles).

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23. Cuál es la actividad que da mas dinero?

Cual es la actividad que es mas importante para su familia?

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**XI. Participación en Turismo**

29. Ha estado involucrado con Kapawi/Chalalan/Posada Amazonas? si ( ) no ( )  
De qué manera ha participado?

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30. Ha trabajado por sueldo en el albergue u hotel? si ( ) no ( )

<i>Puesto</i>	<i>Tiempo</i>	<i>Sueldo</i>

31. Le gustaria que sus hijos trabajen en Kapawi/Chalalan/Posada?

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[Solo para los trabajadores]

32. Cuáles son los cambios en su vida desde que empezó a trabajar en el albergue o hotel?

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33. [Solo para los trabajadores]

Cuáles son las ventajas de trabajar en el albergue o hotel?

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34. [Solo para los trabajadores]

Cuáles son las desventajas de trabajar en el albergue o hotel?

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35. [Pregunta a todos]

¿Ha recibido algún beneficio de Kapawi/Chalalan/Posada Amazonas? si ( ) no ( )  
Cuál(es)?

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[Pregunta a todos]

¿Que hizo con las utilidades que recibió? Que piensa hacer con las que vienen?

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36. [Pregunta a todos]

A quién le pertenece Kapawi/Chalalan/Posada Amazonas?

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37. [Pregunta a todos]

Qué opina de Kapawi/Chalalan/Posada?

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38. [Pregunta a todos]

Que opina de los turistas?

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## **XII. Percepción de Bienestar**

39. Cómo considera una buena vida?

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40. Tiene su familia una “buena vida?” Porque si o no? Que le faltaría?

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41. Que cree que está mal en su comunidad? Quisiera cambiarlo? De que manera?

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42. Qué es lo que les hace orgullosos de su comunidad?

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## **XIII. Vinculos con mundo occidental**

43. Podría decirme quién es el presidente del Peru/Bolivia/Ecuador? \_\_\_\_\_

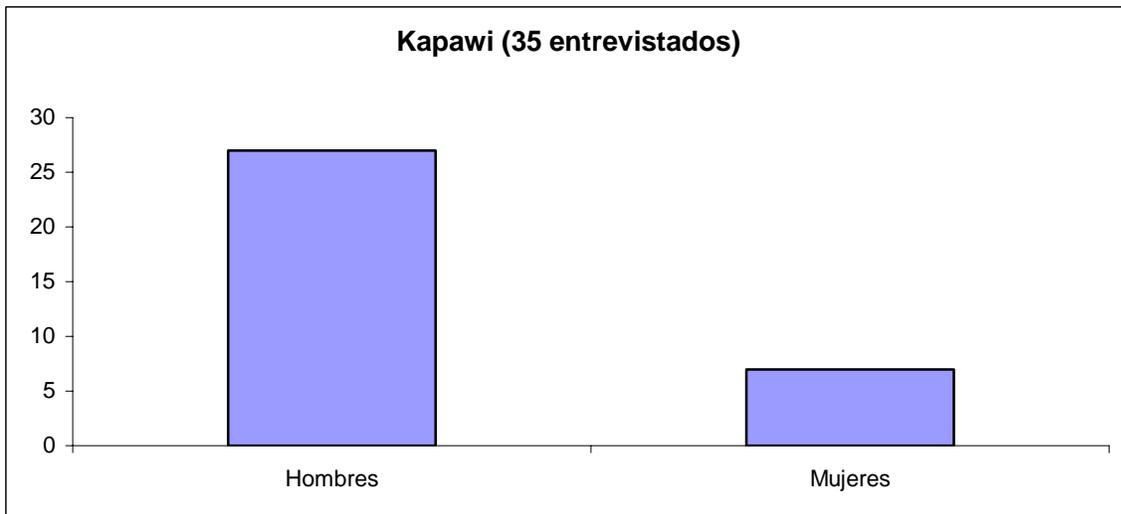
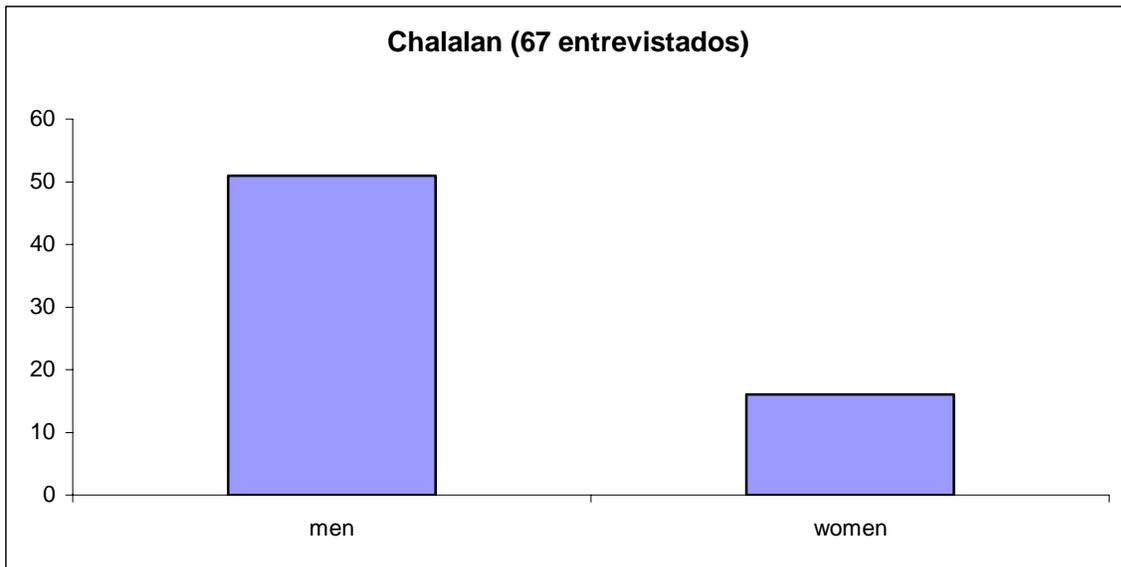
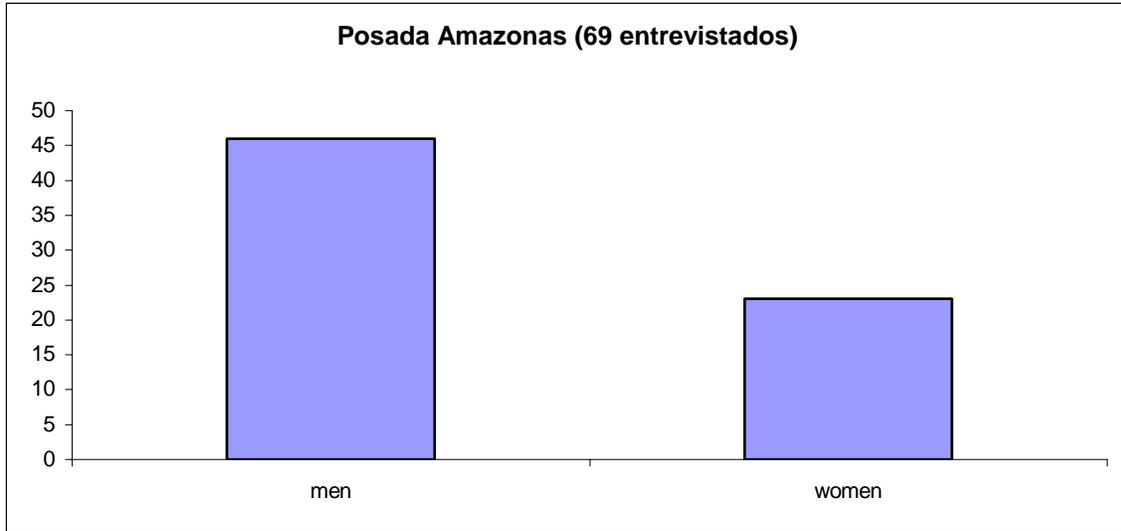
44. Podría decirme quién es el presidente de los EE.UU.? \_\_\_\_\_

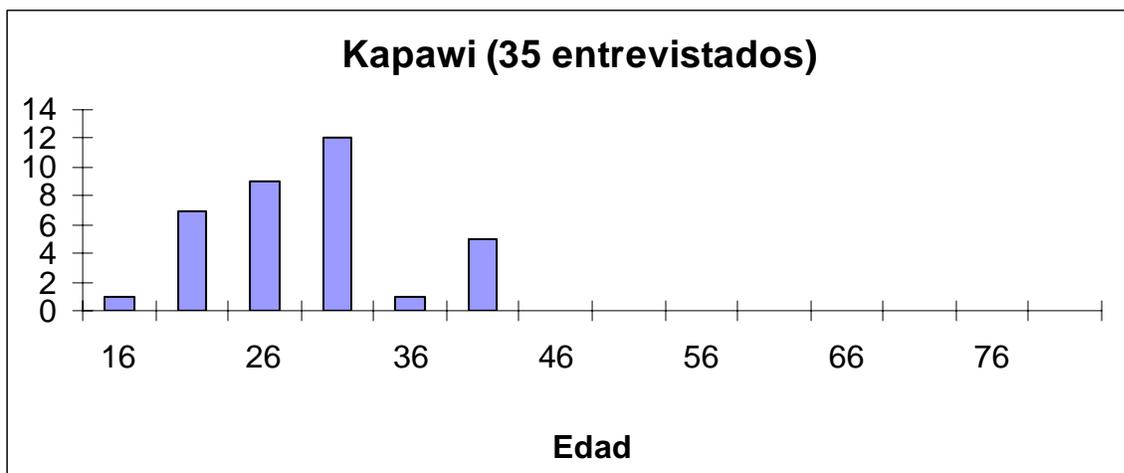
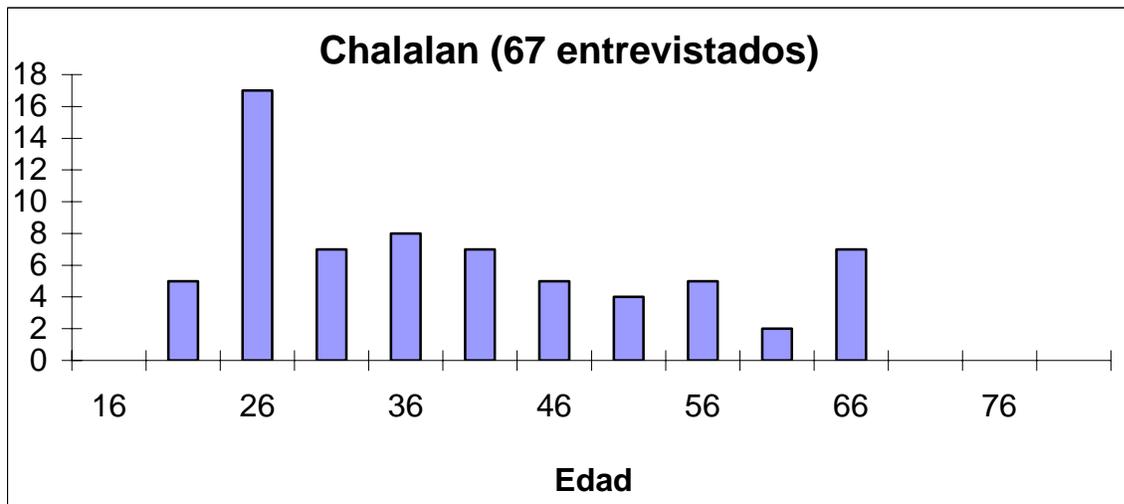
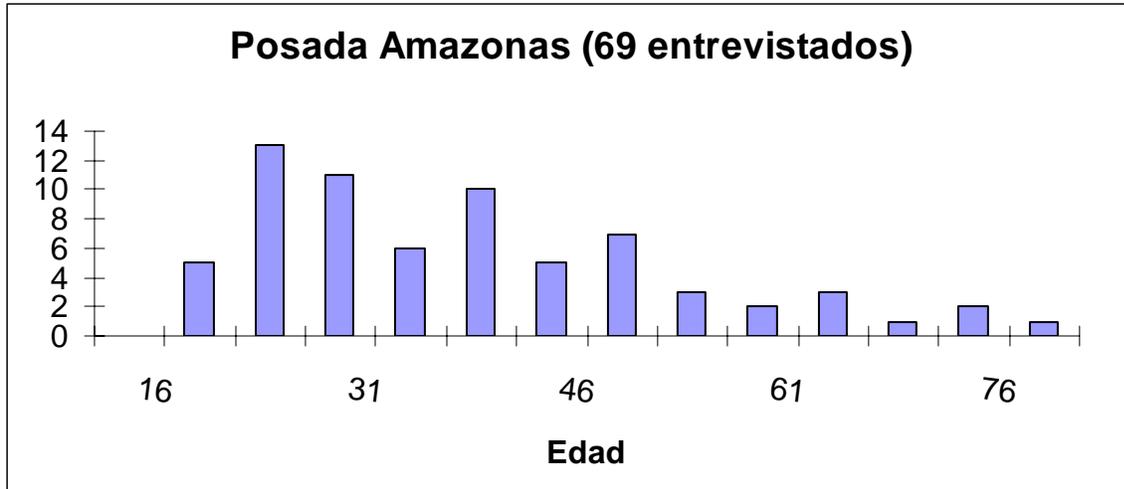
45. Ud. escuchó algo sobre el 11 de setiembre? \_\_\_\_\_

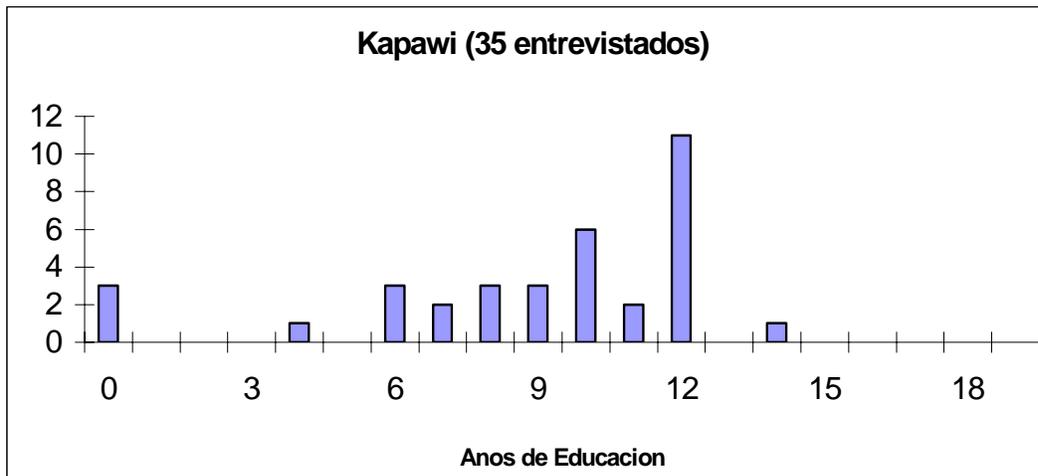
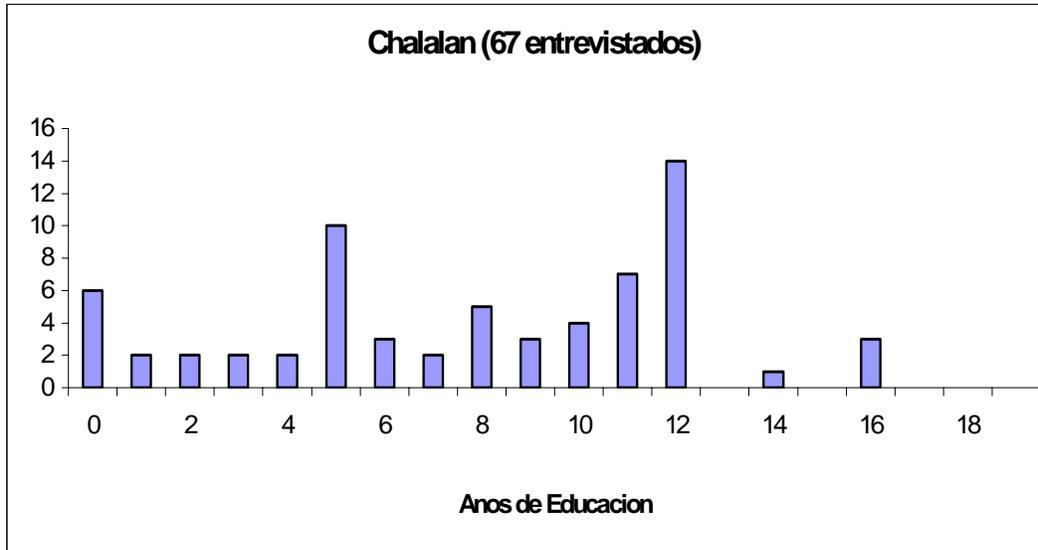
46. *Imagenes reconocidos:*

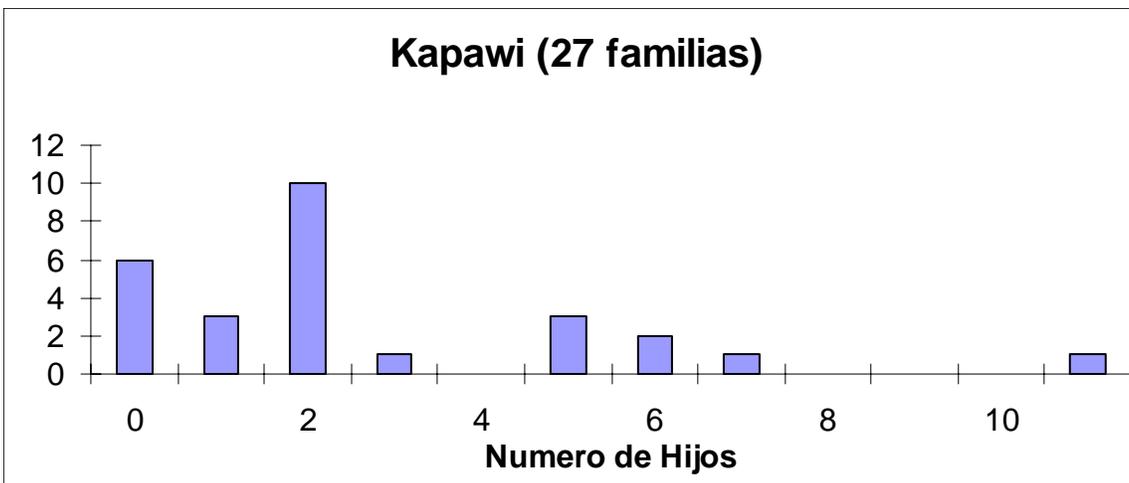
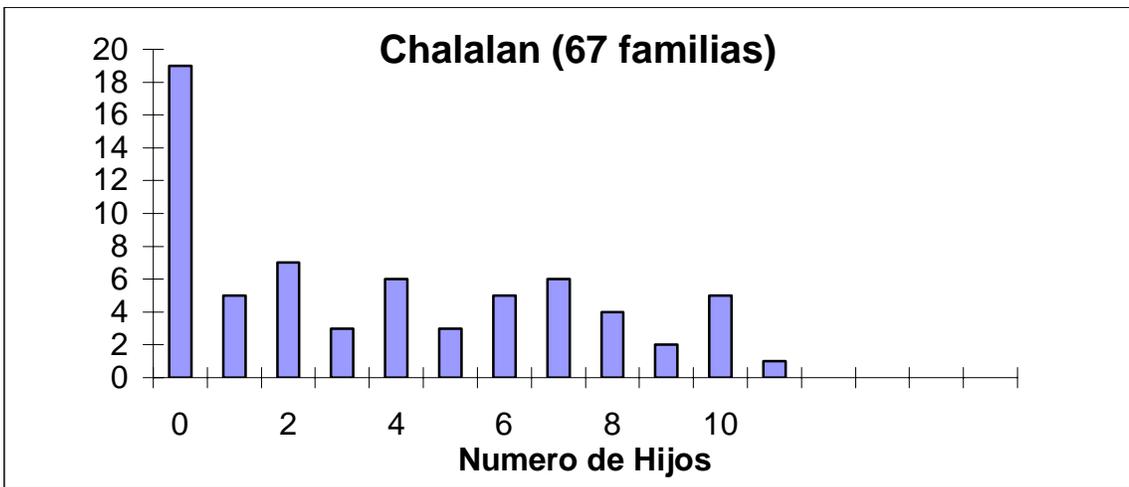
47. Esta aprendiendo Ingles Ud o alguien de su familia? (o ya habla ingles?) \_\_\_\_\_

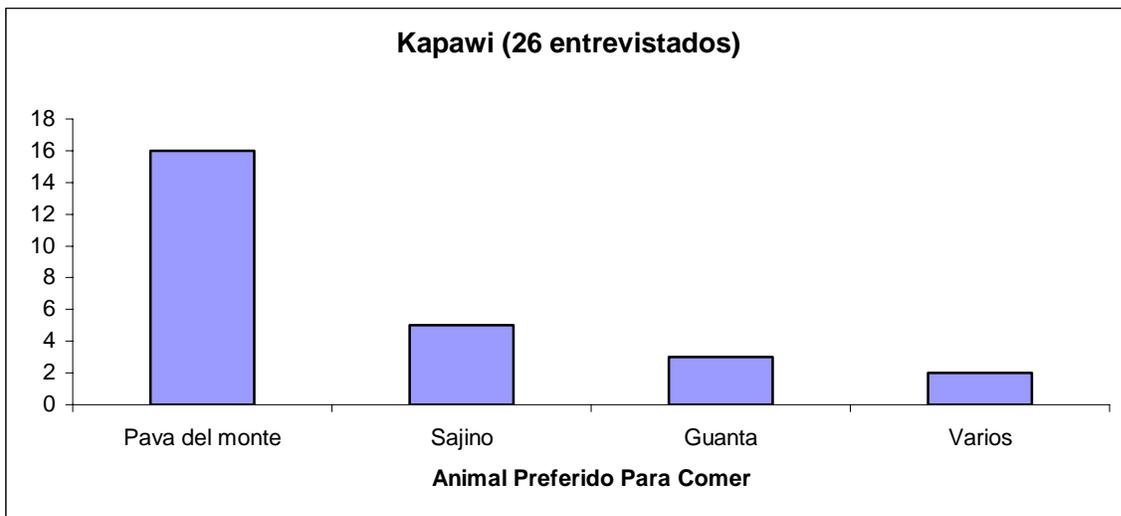
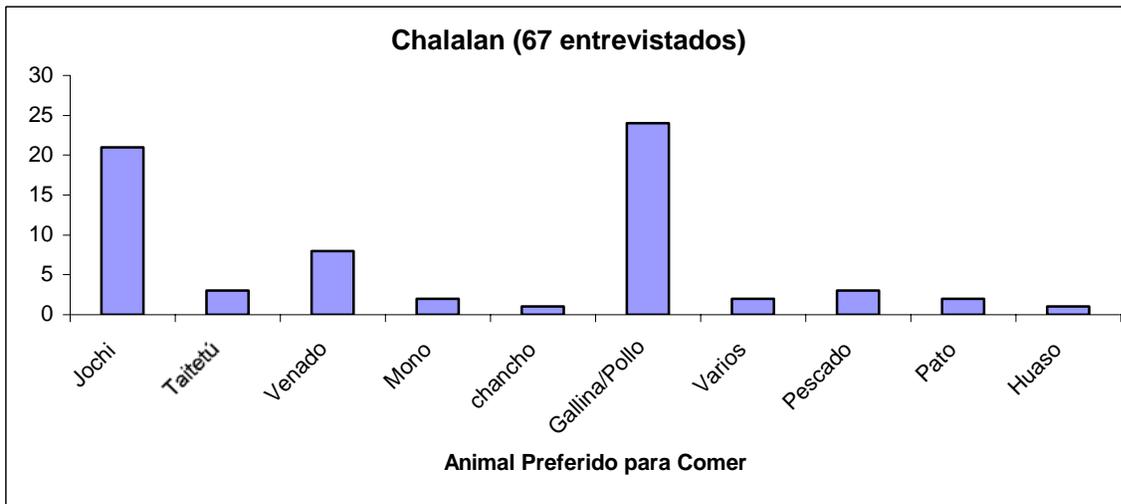
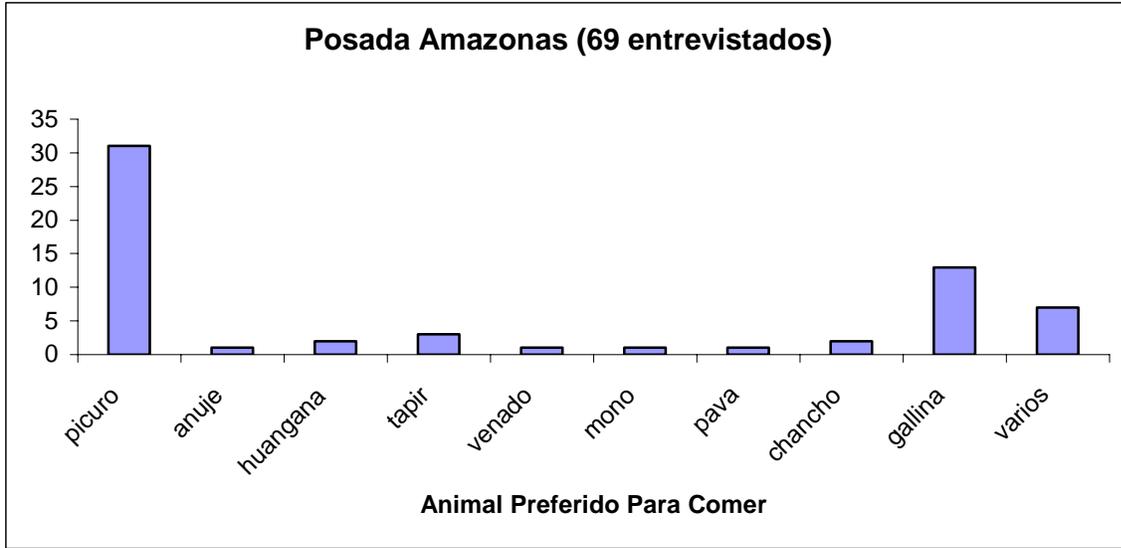
**XIV. Dibujos** a) Cómo es mi comunidad? b) Cómo quiero que sea mi comunidad en el futuro?



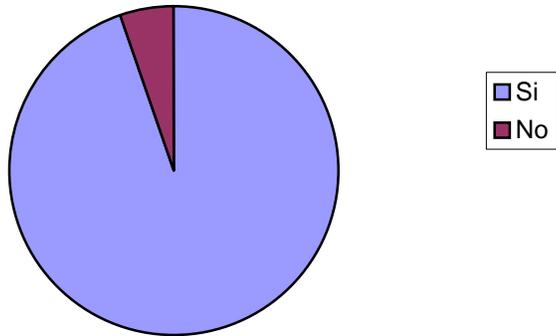




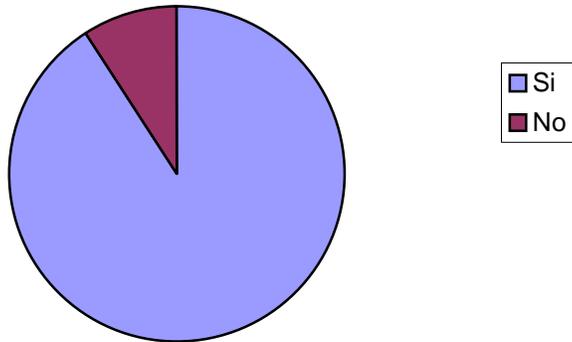




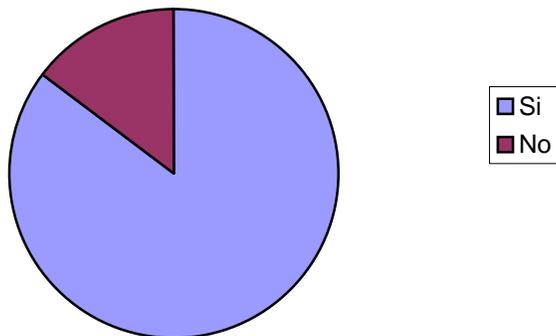
**Posada Amazonas (58 entrevistados):  
Le gustaría que sus hijos trabajen en el Albergue?**



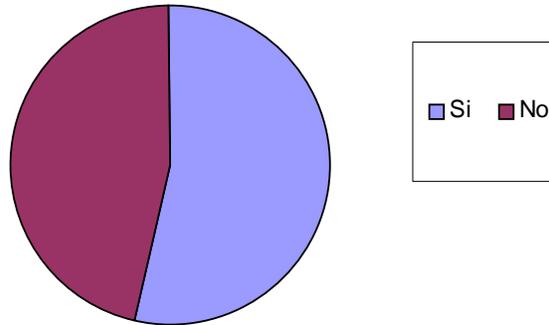
**Chalalan (55 entrevistados):  
Le gustaría que sus hijos trabajen en el Albergue?**



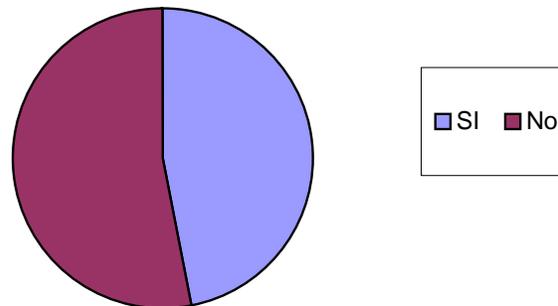
**Kapawi (27 entrevistados):  
Le gustaría que sus hijos trabajen en el Hotel?**



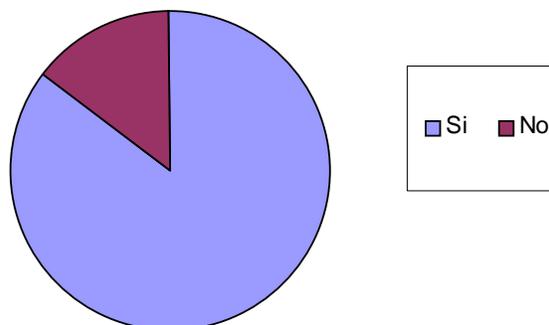
**Posada Amazonas (60 entrevistados):  
Tiene Usted una "Buena Vida"?**

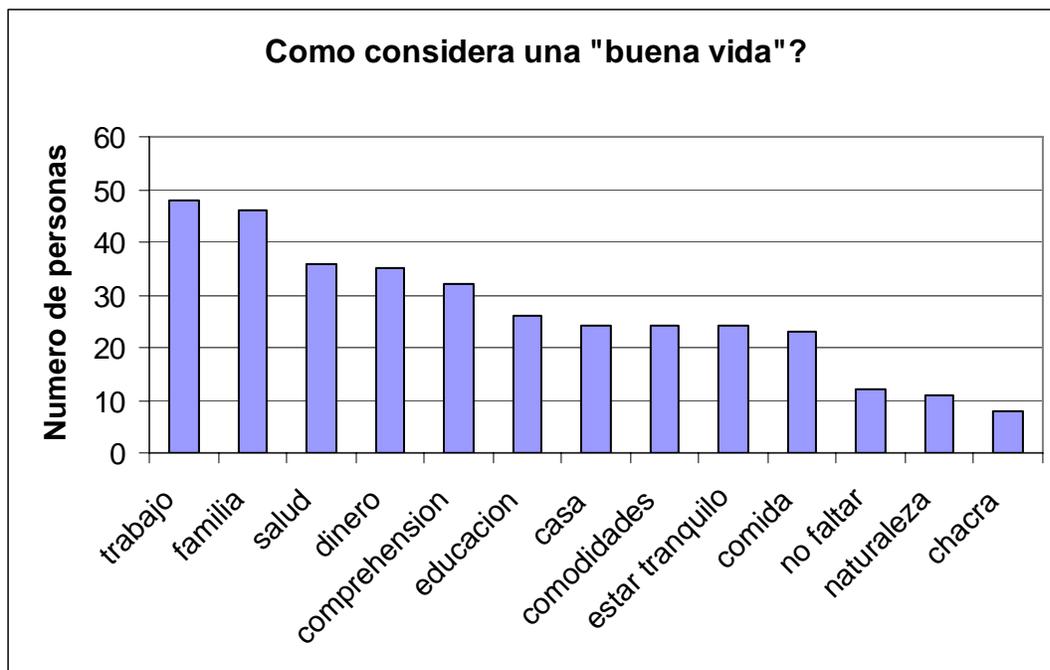


**Chalalan (66 entrevistados):  
Tiene Usted una "Buena Vida"?**



**Kapawi (27 entrevistados):  
Tiene Usted una "Buena Vida"?**





**Tiene Usted una buena vida?**

Sexo	"Si"	"No"	% que dijo "Si"
hombres	72	53	58%
mujeres	18	13	58%
<b>TOTAL</b>	<b>90</b>	<b>66</b>	<b>58%</b>

**Tiene Usted una buena vida?**

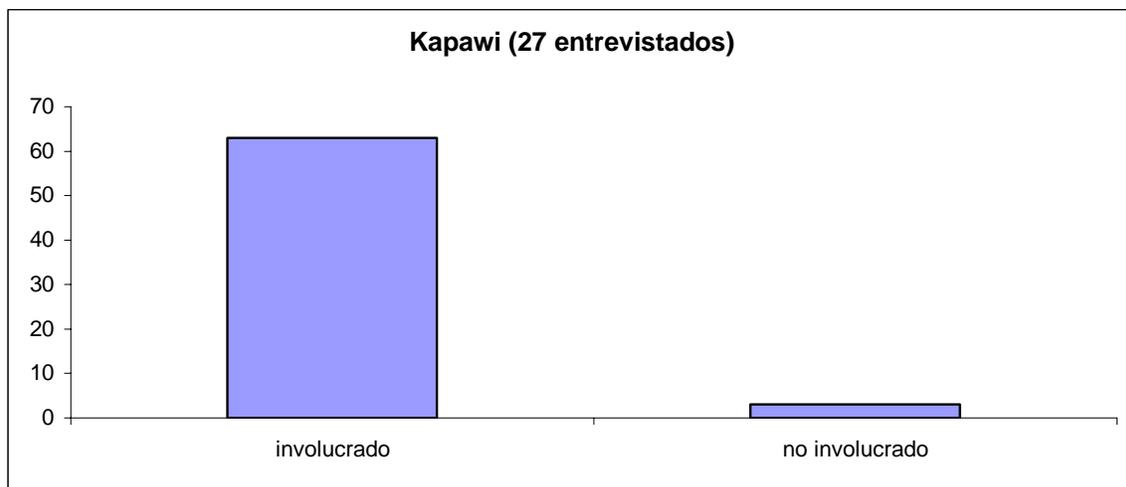
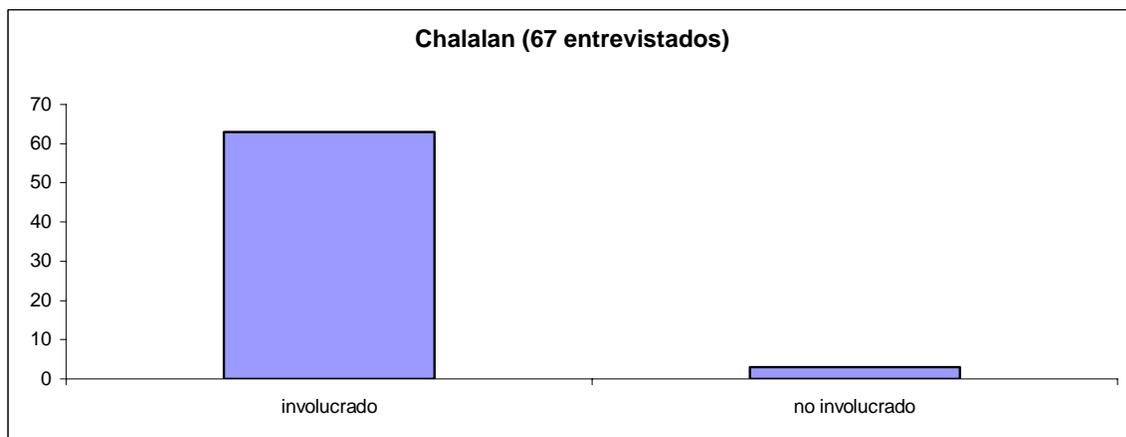
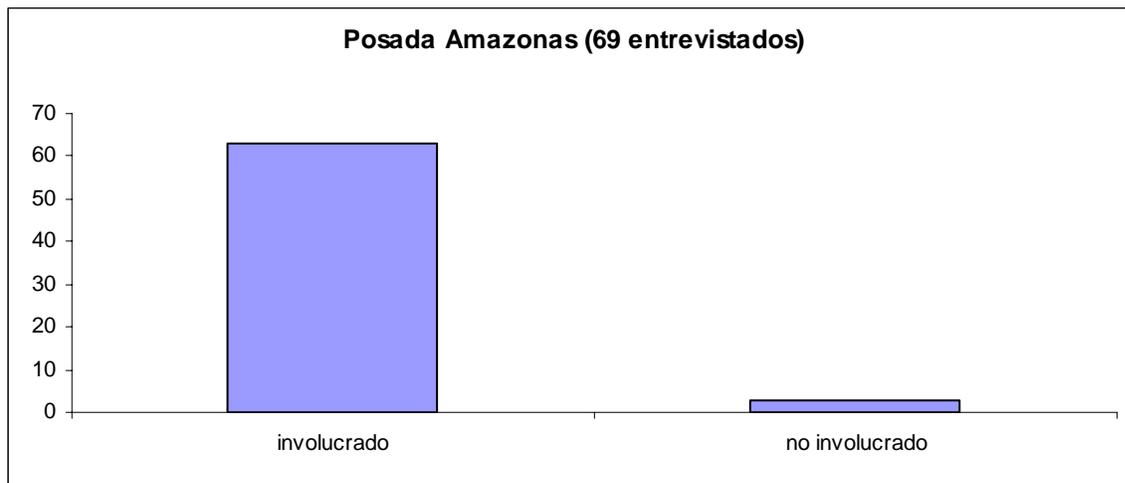
Edad	"Si"	"No"	% que dijo "Si"
16-25 años	26	17	60%
26-40 años	35	31	53%
41-55 años	16	11	59%
56-mas años	<b>13</b>	<b>7</b>	<b>65%</b>
<b>TOTAL</b>	<b>90</b>	<b>66</b>	<b>58%</b>

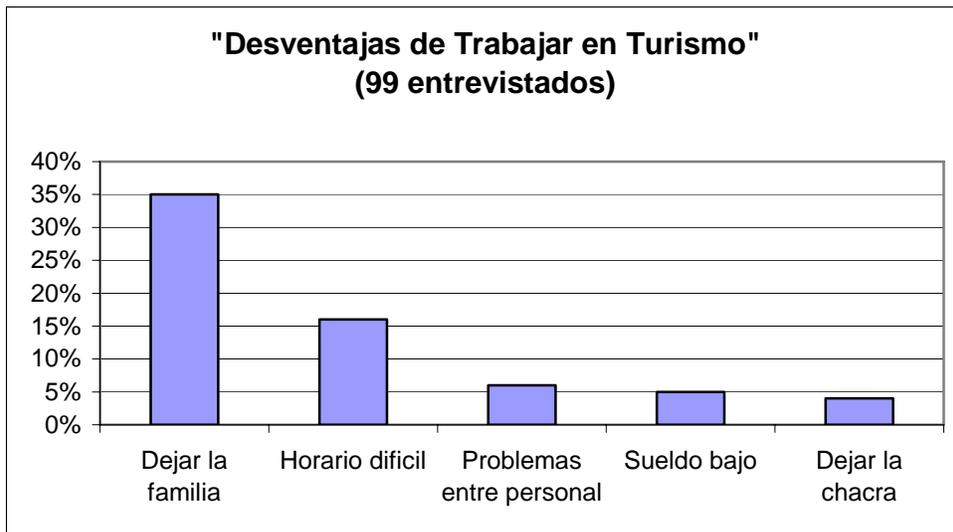
**Como considera una BUENA VIDA? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
Cuando no falta para comer ni para los hijos	Contempla el estar sano, estar junto a su familia, tener trabajo, una casa para dar a sus hijos, tener para comer	Tener una buena casa, agua potable, servicios higiénicos, alimentación completa con carne y pescado y tener ropa.
Cuando el ambiente no esta contaminado	Tener ingresos economicos suficientes, educación, salud	Formar un buen hogar con la familia, cuidarse mutuamente y buena salud
Tener las comodidades que uno desea	Educación y sentirse orgullosos de su cultura	Vivir con la familia y los hijos, tener casa y comida
Ser feliz en el hogar	Trabajar para el pueblo para beneficio de todos	Estar bien con la familia, buena salud y agua potable
Cuando nadie se está quejando por nada	Salud y trabajo	Tener dinero, comer bien,tener buena música para escuchar,hacer deportes,estar junto con la familia.
Tener tu sueldo, estar con tu pareja, tener tu s animales, árboles grandes, tener amigos en la CNI, ser social tranquilo, no tener malos sentimientos, problemas	Tener tranquilidad y respirar aire fresco	Tener dinero, tener muchos productos para alimentarse, buena salud y llevarse bien entre al familia.
Trabajar y ganar dinero para estar contento	Tener trabajo en Chalalán	Tener una huerta para sembrar todos los productos para el consumo, llevarse bien con toda la familia y ahorrar la plata para la salud.
Gozar de muy buena salud; comprenderse bien con la pareja; solvencia económica regular de acuerdo a las necesidades. Cubrir educación, comida.	Tener educación, salud, ser protagonista de un pueblo	No criticar a las personas, no insultar y vivir feliz.
Vivir feliz con la pareja, tener de todo y que no falte nada	Estar en contacto con la naturaleza, respirar aire puro, tener un poco de todo en el pueblo como hoteles	3 cosas: Tener huerta propia, cazar bien para traer aves, tener plata para la salud.
Que se entiendan bien en la comunidad	Es estar a lado de mi familia	Trabajar, aumentar el ganado para los hijos, aumentar las gallinas para no ir de cacería. Educar bien a los hijos.
Tener todas las cosas	Vivir en un lugar propio	Trabajar, tener dinero para vivir y tal vez una esposa.

**Como considera una BUENA VIDA? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
Sentirse a gusto donde vive, en la selva. Sin peligro de vehiculos ni delincuencia	Tener posición con dinero, puedan estudiar mis hijos	Vivir bien con la señora y los hijos sin pelear. Mantener bien a los hijos. Tener casa grande para vivir juntos.
Ingreso económico. Mejorar el sistema agrícola sin utilizar abonos artificiales	Trabajo, casa y ambiente sin contaminación	Tener una casa propia, buena salud y estar en amistad con la familia.
Tener bastantes vínculos con la familia. Amistad. Darse ayuda con la familia	La tranquilidad	Vivir bien con la familia. Tener buena salud, sin malaria. Tener dinero para la educación y emergencias.
Estar en su chacra, producir, sembrar, estar junto con sus hijos	Vivir con la naturaleza	Tener una huerta con productos, tener una casa para vivir entre la familia y ahorrar la plata para cubrir enfermedades e ir de cacería para la alimentación.
Tener casa propia y un trabajo seguro	Que haya mas dinero para ganar y estar tranquilo	Tener una casa grande con pared y educar a los hijos.





**CAMBIOS en la vida desde que empieza a trabajar en turismo? (una muestra de respuestas)**

POSADA AMAZONAS	CHALALAN	KAPAWI
Valoro más el medio ambiente, animales, vegetación. También me ha alejado más de su familia por trabajar en APA y sacar adelante la empresa. Descubrí que quiero aprender algo más de turismo. La chacra ya no produce como antes	No puedo cazar y pescar ahora; hay responsabilidades	Antes no sabía nada del funcionamiento de un hotel y tampoco sabía inglés y he conocido gente, todos mis cambios son buenos
Antes me dedicaba más a la chacra; ahora vivo más en PEM. Tengo dinero para pagar agua, luz y no tengo que esperar 3 meses o un año para tener la plata.	Interpretación de flora y fauna, es lo que hago ahora	Desde que yo empecé a trabajar en hotel no me he enfermado y me divierto. Cuando regreso a mi casa y como la comida tradicional, me enfermo rápidamente. Me estoy olvidando de tomar la chicha . . .
Personalmente creo que no he cambiado pero me ha dado fuerza para saber que las mujeres pueden salir adelante solas, que no dependen de un hombre para eso	Separación de mi familia, trabajo por la comunidad	No estoy permanentemente en la comunidad con la familia
Antes trabajaba en la madera. Era mucho más largo (5 meses). En lo social ahora se expresarme ante las personas. He dejado sola mi chacra también.	Poco mas de dinero y mayor responsabilidad	Ahora conozco mucho sobre hotelería. Ha cambiado la alimentación--ahora como mas vegetales y lechugas.
Me siento más fuerte. Me llevo mejor con mi mujer. A través del contacto con gente de afuera y Lima tengo más roce social, aprendo y recapacito.	Sigo igual, oportunidad de viajar fuera y dentro del país	Me ha cambiado la idea sobre el trabajo en la vida. Ahora que conozco el Hotel quiero trabajar por períodos de tiempo mas largos y así aprender más.
He pensado que ya no voy a gastar la plata en tomar para tener más para mis hijos y cubrir enfermedades que puedan aparecer	Trabajo mas liviano, genera economía	Hago contacto con gente de todo el mundo y pierdo la timidez.
Me relaciono con más personas de otros sitios y de otros niveles. Pero extraño un poco la caza y la pesca.	Ver mas positivamente los recursos naturales y todo el medio ambiente	Antes no podía comprar medicamentos y con el dinero ahora si compro cualquier cosa.
Puedo comprar lo que quiero pero no veo mucho a mis hijos.	Casi no me falta en la cocina para el alimento de mis hijos	Me ha cambiado la idea de la limpieza en mi casa. Ha aprendido que los pasajeros les gusta estar en habitaciones limpias y quiero hacer lo mismo en mi casa.
Empecé a pensar mejor. Antes estaba en minería, madera, etc, siempre cambiando, pero desde APA me quedo en turismo	Ser socio y estar preocupado en el tema de la empresa y manejo de recursos naturales	No tomo la chicha ni guayusa regularmente, y no voy de cacería. Solo me preocupo del hotel.

**CAMBIOS en la vida desde que empieza a trabajar en turismo? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
No ha habido muchos cambios, aunque extraño la chacra, la recolección e ir al monte	Ha aprendido sobre igualdad entre los sexos	En nuestras casa no hay horarios, aquí son muy exigentes; alla se trabaja cualquier rato que se quiera.
Cambios económicos, ahora tengo mayor comodidad. He aprendido muchas cosas como tratar mejor a las personas. El trabajo en el albergue te despierte, te abre los ojos y da una nueva visión sobre conservación y la familia	Tengo mas responsabilidad; cambia el comportamiento con los amigos; te vuelves mas responsable	
Intercambiar conocimientos, conocer el inglés y manejarlo	Si he cambiado, ya que mi padre no me mantiene sino yo a él.	

**VENTAJAS de trabajar en turismo? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
Seguro médico, apoyo para sobresalir en lo que uno se ha propuesto; mayor contacto con personas como científicos, personajes, intercambio de experiencias	Con salario, estar por lo menos asegurado por cualquier emergencia, seguro de salud, opción de aprender una relación más diaria con turistas, relacionado a todo nivel, te da una imagen, te da valor como persona, te da opción de dar estudio a tus hijos	Ahorra dinero para emergencias
Recurso económico mensual que permite educar bien a los hijos	Relacionarse con diferentes personas de alto nivel como de gobierno e internacionales	Ganar un sueldo fijo, dinero para mantener a la familia
Sólo la puntualidad en los pagos	Se aprende mucho sobre la naturaleza y los secretos del bosque	Da oportunidad para salir afuera a la ciudad gratis, y da cupo en el avión
1. Aprendes a estar en la sociedad con la gente. Intercambiar culturas con los extranjeros. 2. Aprendes lo que es conservar la naturaleza, los animales que se deben cuidar. 3. Aprendes a vivir mejor, más ordenado	Trabajo no es duro	Se conoce la necesidad de proteger el bosque y los peligros de la destrucción de la selva.
La empresa es mejor que otras, el sueldo es mejor y más perfecto	Tener ayuda rápida en bote	Tiene la ventaja de ascender de puesto y capacitarse en la ciudad.
Con esmero y dedicación se puede lograr mucha. Se tiende a ascender y adquirir ganas, reputación, respeto, más dinero y aprecio	Poder ganar mensualmente	Es bueno porque se aprende cada día algo nuevo sobre cada área del hotel.
Se aprende muchas cosas, experiencias, conocimientos, autoeducarse personalmente. Si no se aprovechan las oportunidades que da el proyecto vuelves a casa igual que como te fuiste	Tengo seguro de salud	Se tiene una fuente de ingreso para la educación de los hijos, salud y atención a toda la familia.
Aprender algo, ser responsable en el trabajo. Aprender a tratar a los turistas. Estar a la hora puntual.	Todo esta a la mano no falta nada para poder trabajar	Gana dinero, el hospedaje no les cuesta ni tampoco la alimentación.
He podido independizar	Estaba bien comido y bien dormido en Chalalán	Para aprender como se trabaja fácilmente.
No se gasta en comida y te rozas con gente de otros lugares y del exterior	Capacitación en otras áreas, aprendes gastronomía y bebidas, conocimiento del sistema solar	Andar con los turistas y tener la oportunidad de aprender el inglés.
Se tiene todo: comida, cuarto. No se gasta en nada	Los trabajadores ganan y duermen bien, tienen comodidades	Ha aprendido muchas cosas sobre aves y los demás también aprenden

**VENTAJAS de trabajar en turismo? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
No se gasta nada del sueldo. Se aprende de todo un poco y de lo que es trabajar en una empresa	Uno no gasta dinero, se ahorra dinero, te dan dotación de poleras	Para cubrir necesidades como el estudio y materiales didácticos.
Depende de la capacidad de uno. Si uno se lo propone. Luchar sin hacer daño a otros. Esforzarse. Uno puede llegar a ser más que un simple empleado. La empresa da la oportunidad para ser más. Depende de uno tomar y aprovechar las oportunidades	Puedo ahorrar dinero	
	Tener un trabajo fijo	

**DESVENTAJAS de trabajar en turismo? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
No se ve mucho a la familia	Se puede ganar mucho mas en la comunidad con menos responsabilidad, te separas de la familia, pierdes relación social con la comunidad	Estar lejos de la familia, la familia pasa botada, no se come lo propio, la incomodidad de los cuartos de empleados en el hotel, caminar largas distancias para llegar a hotel.
Alejarse de la familia	Estar separado de la comunidad y de mi familia	Los sueldos son muy bajos y la comida les hace daño.
Trabajo largo. Más de las 8 horas (3am a 9.30 pm)	No hay feriados	El quisiera especializarse en el área de carpintería y aprender a construir muebles, pero como siempre esta muy ocupado en lo suyo no le dan la oportunidad de hacerlo. También toca caminar 3 días enteros para llegar al hotel después de vacaciones y llega cansado y eso le desanima de seguir trabajando en el hotel
No estar al lado de la familia. No estar en las reuniones con la comunidad, las faenas, etc. No hay permiso para eso	El abandono de los hijos y el dinero que se va rápido	Se abandona a la comunidad por mucho tiempo y se pierde contacto.
No hay tiempo libre a tu disposición. Hay obligaciones contraídas	Cansa trabajar por la tarde	Estar lejos de la familia por mucho tiempo.
La prohibición de caza y pesca y recolección de frutos	Me he separado de la familia 2 meses	La desorganización de los empleados para seguir adelante.
Había problemas de chismes y me extrañaba a mis hijos	Dejas los chacos abandonados y ya no se colabora en el pueblo	Pierde la oportunidad de trabajar en chacras
Se tiene que trabajar durante la lluvia también	He trabajado mucho sin cobrar. Los días que he perdido nadie los reconoce	Las familias se separan por la distancia.
Trabajo limitado solo a dos años. Se deja de ver a la familia y la chacra	Ración de comida muy chica para los trabajadores	Abandonamos a la familia, la comida en el hotel no es conveniente para un Achuar.
Ninguna. APA es como el servicio militar. Si no coges ninguna carrera eres un tonto porque hay de todo	Uno no tiene feriados, se trabaja sin horario, no vive con su familia, no tengo seguro	Es difícil caminar largas distancias mas o menos 3 días para llegar.
El pago a veces no es fijo, se demora. A veces casi un mes.	No saber las normas del albergue y uno se aburre rápido, trato de estudiar	
Problemas entre el personal. No se llevan bien	Es tranquilo, no se tiene la libertad de estar como en el pueblo	

**DESVENTAJAS de trabajar en turismo? (una muestra de respuestas)**

POSADA AMAZONAS	CHALALAN	KAPAWI
el horario. Mucho se madruga	Si uno no trata bien a un turista lo tratan mal y podría ir al fracaso el albergue	
Horario. Mucho desvelo, no se puede dormir hasta tarde	Todavía el área no tiene seguridad para los pasajeros, el año pasado nos bloquearon el río y pasajeros perdieron su vuelo	
El horario. Te levantas muy temprano, la familia queda abandonada. Me da pena dejar tanto tiempo solos a mis hijos mientras yo trabaja	No hay tiempo para estudiar, a comida es diferente y el alojamiento es malo	
	En temporada baja se trabaja una semana por mes	

## ALGUNAS MEDIDAS DE RIQUEZA MATERIAL

Posada Amazonas: 60 familias entrevistadas  
 Chalalan: 67 familias entrevistadas  
 Kapawi: 27 familias entrevistadas

ALBERGUE	Gallinas	Promedio por casa	% que venden gallinas	Ganado	Promedio por casa	% que venden ganado
Posada Amazonas	748	12.5	17%	121	2	<1%
Chalalan	1432	21.4	49%	30	.43	<1%
Kapawi	604	22.4	74%	49	1.8	<1%

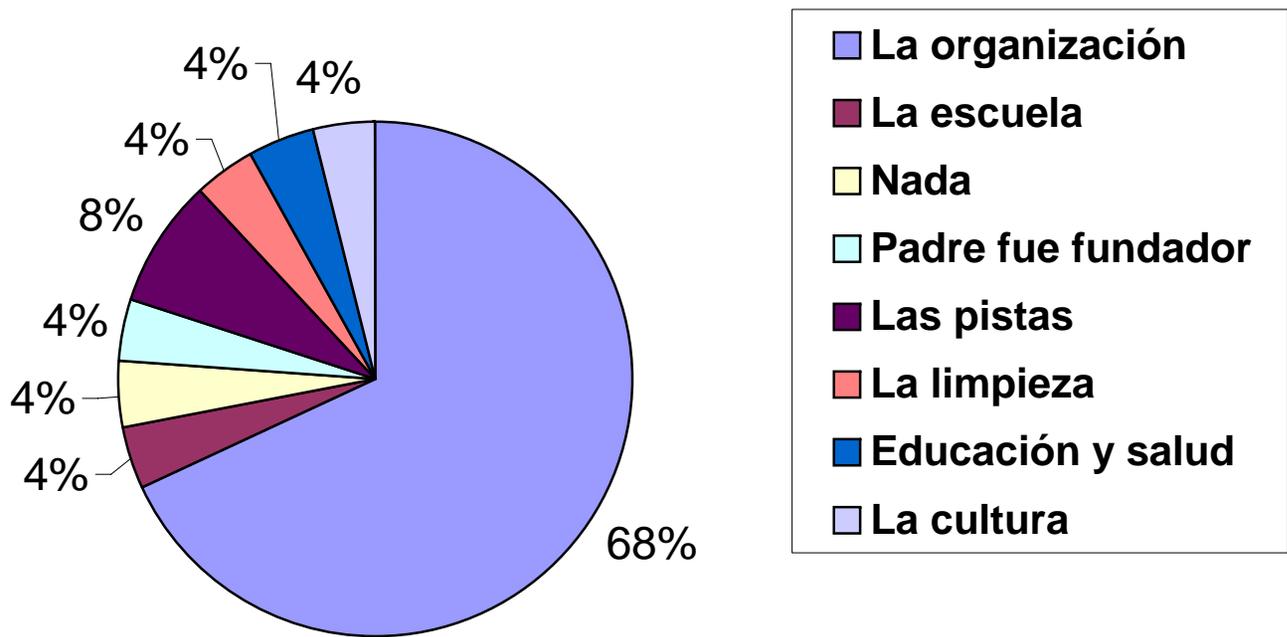
ALBERGUE	Radio %	Televisión %	Bicicleta %	Peque %	Motosierra %	Escopeta %	Reloj %
Posada Amazonas	53 88%	37 62%	12 20%	15 25%	10 17%	19 32%	39 65%
Chalalan	47 70%	6 9%	15 22%	0 0%	9 13%	45 67%	49 73%
Kapawi	13 48%	1 4%	0 0%	1 4%	1 4%	25 93%	15 55%

<b>"Un promedio de cuánto gasta su familia cada mes?"</b>			
<b>Posada Amazonas</b>	60 familias	317 soles	US\$90
<b>Chalalan</b>	67 familias	419 bolivianos	US\$70
<b>Kapawi</b>	27 familias	66 dólares	US\$66

<u>Promedio de Ganancias Anuales en Productos Agrícolas</u>		
<b>ALBERGUE</b>	<b># familias</b>	<b>Dólares</b>
<b>Posada</b>	60	1,674
<b>Chalalan</b>	67	21 **
<b>Kapawi</b>	27	176

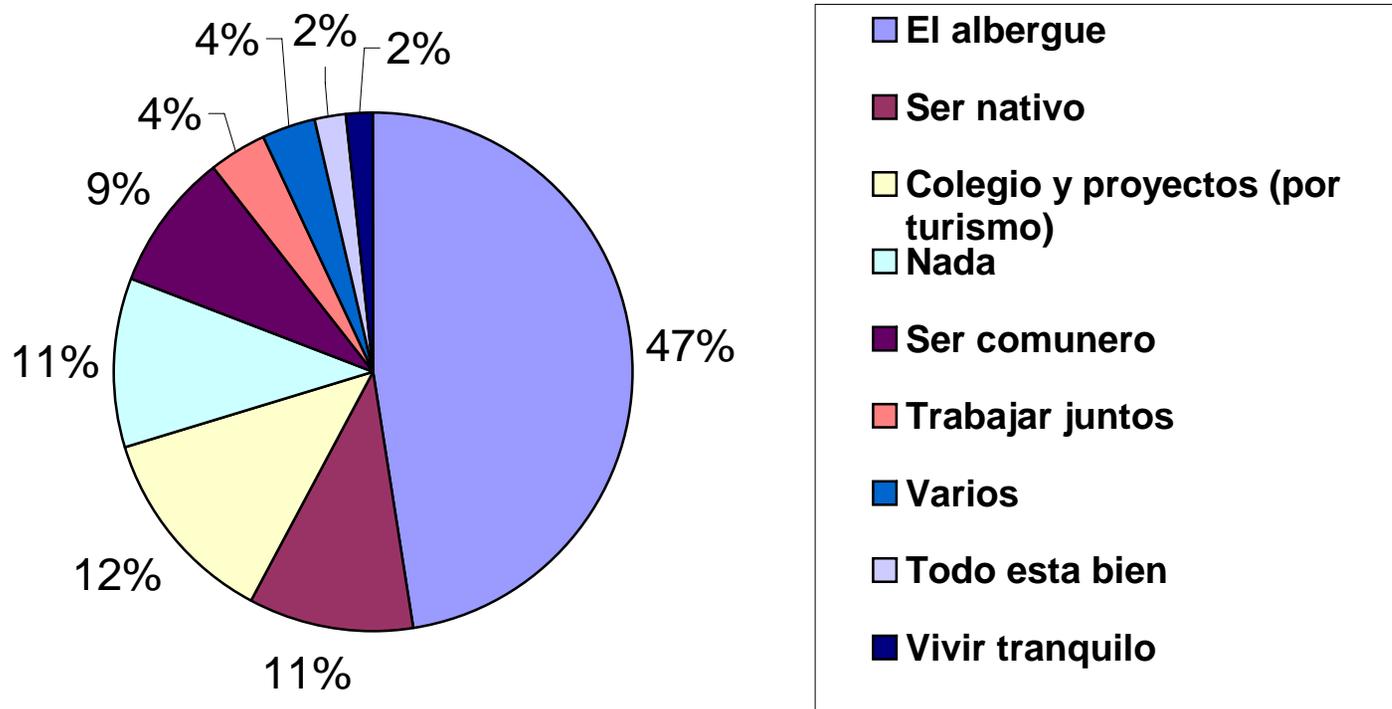
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### "Que le hace orgulloso de su comunidad?" Kapawi: 25 respuestas

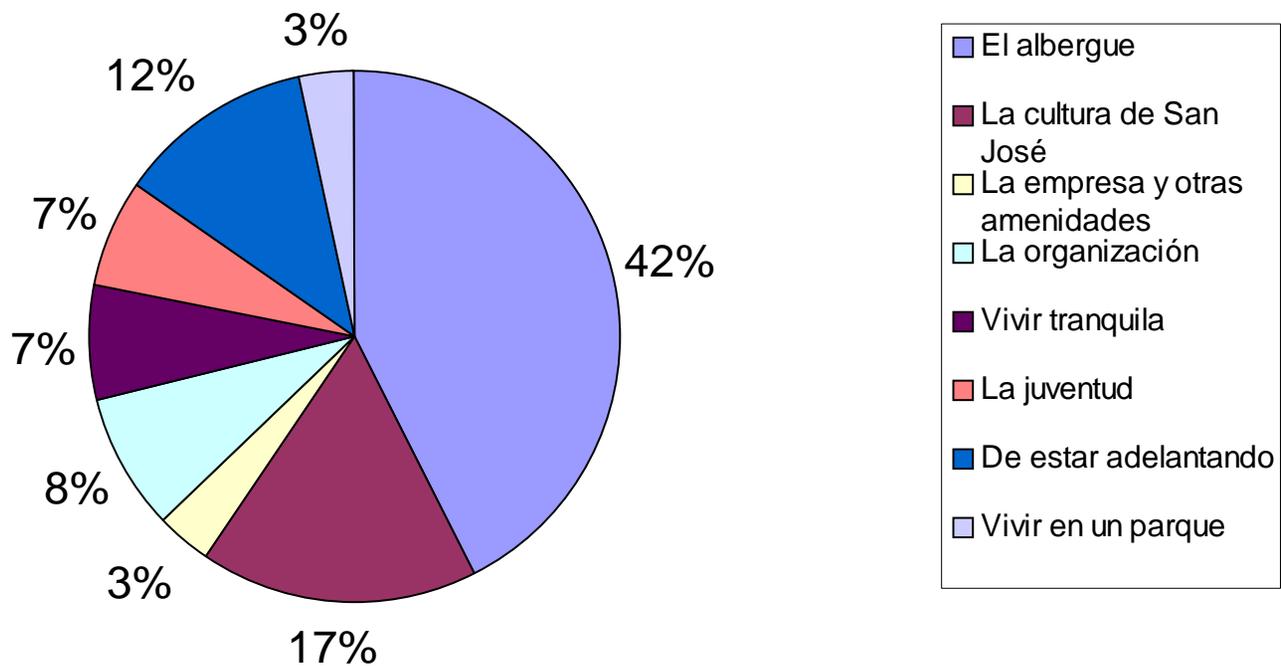


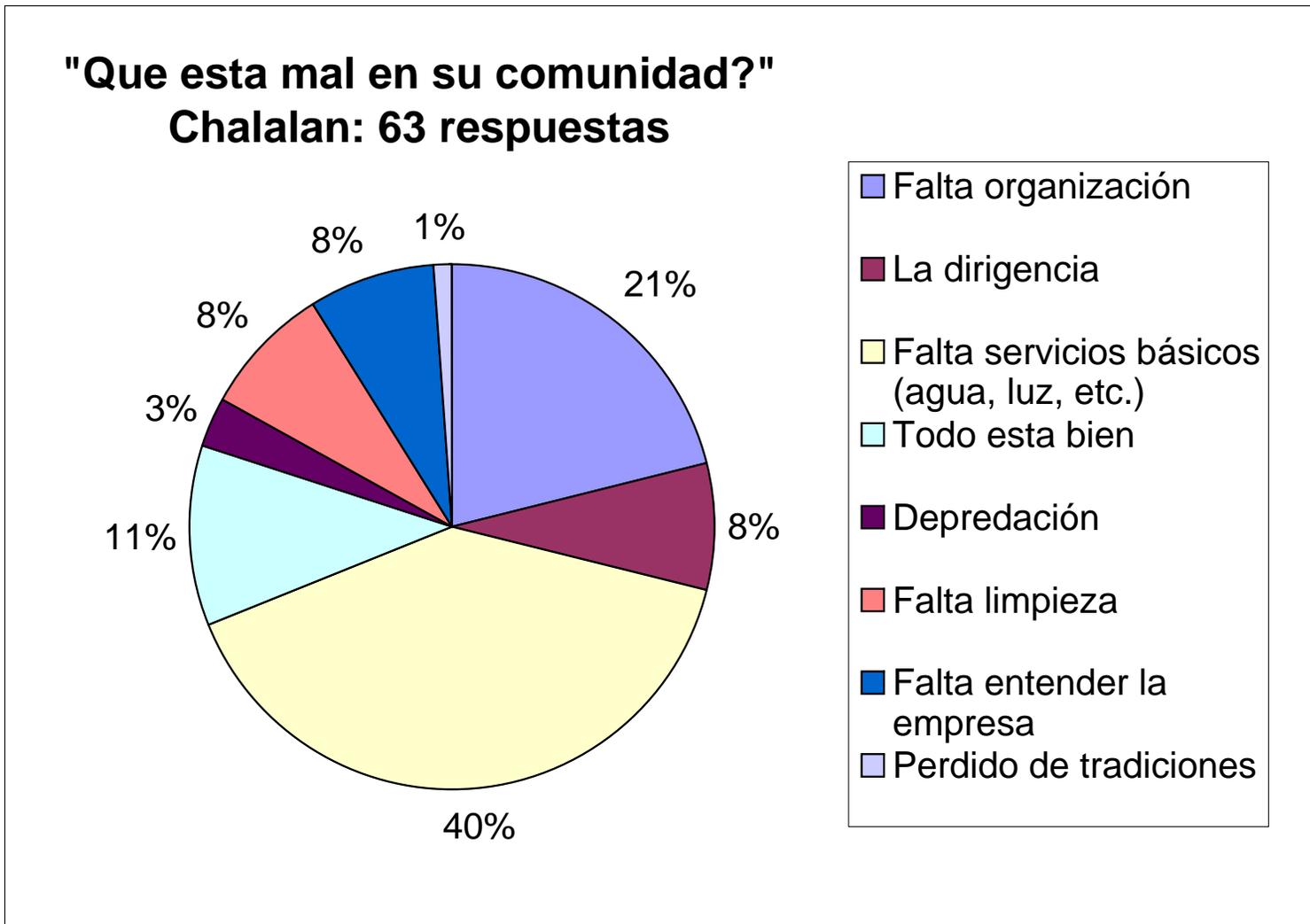
# "Que le hace orgulloso de su comunidad?"

## Posada Amazonas: 57 respuestas

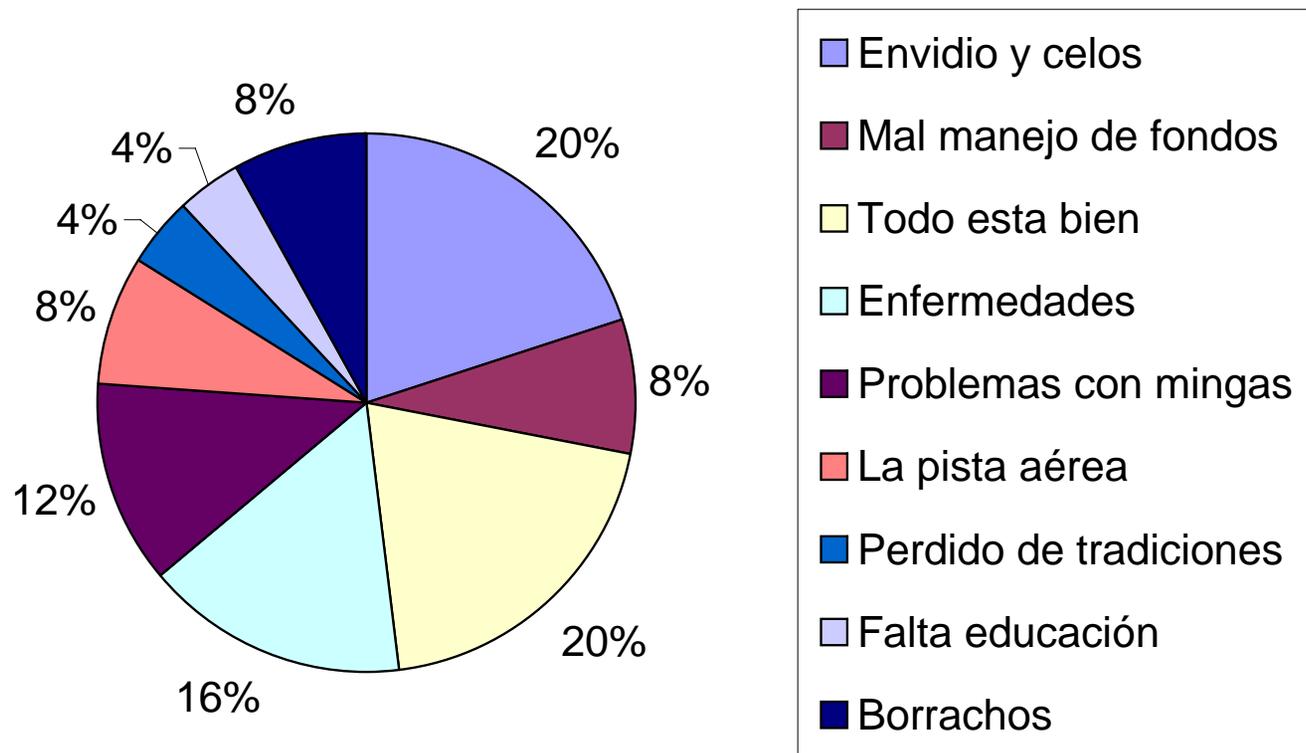


## "Que le hace orgulloso de su comunidad?" Chalalan: 59 respuestas

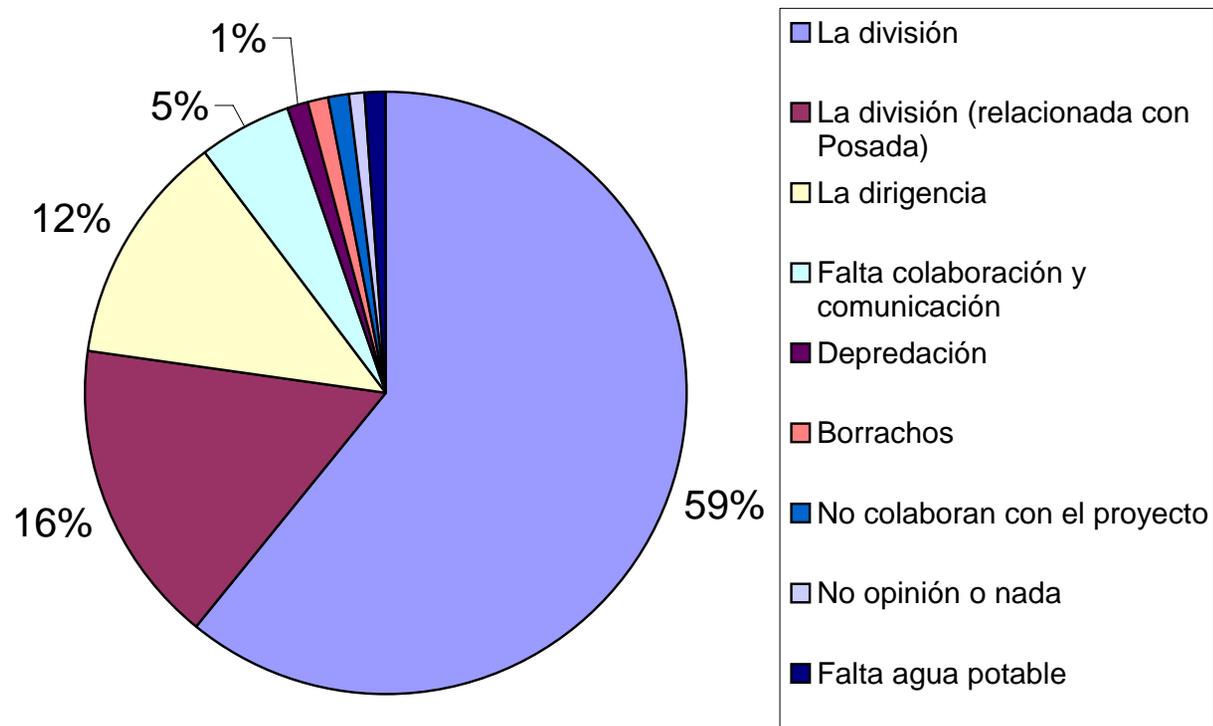




### "Que esta mal en su comunidad?" Kapawi: 25 respuestas



### "Que esta mal en su comunidad?" Posada Amazonas: 58 respuestas



POSADA AMAZONAS (69 entrevistados)

<b>Animales Mas Importantes Para la Familia</b>		
#	<i>Animal</i>	%
27	Picuro	15
19	Tapir	10
14	Venado	8
12	Scarlet	7
12	Jaguar	7
12	Sajino	7
11	Paujil	6
10	Añuje	5
9	Maquisapa	5
9	Aguila	5
8	Ararauna	4
8	Loro	4
8	Lobo	4
5	Ronsoco	3
5	Armadillo	3
5	Zúngaro	3
4	Paco	2
2	Cotomono	1
2	Tucan	1
1	Perezoso	1
1	Oso Hormig	1
0	Shansho	0
184	<b>TOTAL</b>	<b>100</b>

<b>Animales Mas Importantes Para Turistas</b>		
#	<i>Animal</i>	%
48	Jaguar	26
36	Aguila	19
30	Scarlet	16
30	Lobo	16
14	Ararauna	7
7	Tapir	4
5	Perezoso	3
3	Loro	2
3	Ronsoco	2
2	Maquisapa	1
2	Shansho	1
2	Oso Hormig	1
2	Paujil	1
1	Cotomono	1
1	Tucan	1
1	Sajino	1
1	Añuje	1
0	Venado	0
0	Picuro	0
0	Armadillo	0
0	Paco	0
0	Zúngaro	0
188	<b>TOTAL</b>	<b>100</b>

**Hay lugares donde no se caza?**

ALBERGUE	SI	NO	DONDE Y PORQUE? (muestra de respuestas)
POSADA AMAZONAS	60	0	La reserva del albergue
			Por la parte de APA porque es reservación de ecoturismo
			Reserva de Nape
			La reserva porque se tiene el proyecto de medicina tradicional y el albergue
			Reserva Nape pero igual los nativos ingresan a mitayar por ahí. Se hizo la reserva para el mejor llamamiento de los animales y que los turistas puedan ver
			Lago 3 Chimbadas porque es zona reservada hecha para conservar y proteger a los animales
			Sólo parque Nacional de La Torre para arriba. En la comunidad sí se puede
			Sólo en la reserva de la comunidad. Es beneficio para la comunidad que cuida sus bosques para el turismo
Reserva de la com de 3000 has			

ALBERGUE	SI	NO	DONDE Y PORQUE? (muestra de respuestas)
CHALALAN	61	4	Mas adentro de la comunidad, estamos esperando un plan de manejo con la dirección del parque
			A 3 días de aquí y Chalalán porque es parque y guardamos para los turistas
			El trayecto de la banda hacia abajo, esta prohibido
			Alrededor del pueblo no hay mucho
			La parte dedicada al turismo y cerca de Chalalán
			En el parque, es prohibido
			Chalalán para conservar
			Cuando es lejos mas de un día
			Chalalán, por ser plan de manejo
			Parque Madidi y Chalalán, lugar de turistas y es área protegida

ALBERGUE	SI	NO	DONDE Y PORQUE? (muestra de respuestas)
KAPAWI	6	20	Cerca de los senderos del hotel
			En bosques de guadúa ya que no es un lugar accesible y existe peligro por las culebras.
			En el lindero con la comunidad, para que no se acaben los animales.
			No se caza dentro del área zonificada, mas o menos a 4 horas de la comunidad Guaraní ya está permitido la cacería. Y esto es para que regenere la diversidad.
			En territorio de la otra Asociación o en lugares muy lejanos.
			En cualquier lugar se puede cazar

**Qué opina del ALBERGUE o HOTEL? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
Proyecto de gran futuro para los comuneros porque da mucha ayuda como educación en ecoturismo.	Puede ser una empresa que puede dar como un modelo a mas comunidades porque quisiéramos que sea uno de los modelos para que otras comunidades puedan formar otras empresas	El hotel ayuda a la FINAE, dejan ingresos para los Achuar y los trabajadores ganan sueldo. Ayudan a proteger el bosque.
Fue un cambio total para la comunidad entera. Se ve trabajo en equipo, compañerismo, orden	Empresa que creo trabajo para la comunidad y poder terminar el colegio	Ayuda a la comunidad y a cuidar la selva y ayudan con cupos de salida en el avión. Los Achuar no se capacitan lo suficiente y entran a trabajar y salen rápido.
Es lo mejor que le ha pasado a él y también lo mejor que le ha podido lograr la comunidad hasta ahora. Ahora la CNI puede disponer de dinero para gastos imprevistos. También que no sólo se puede vivir cazando sino que involucrándose se puede ser alguien más. No por ser nativo te debes quedar.	Es el futuro para nuestros hijos y ejemplo para las comunidades de Bolivia	Cada vez el hotel tiene mas gente, y educan a sus empleados.
Es bueno porque gracias a eso se tienen proyectos como artesanía, se comercializan trabajos y generando ingresos	Falta gente profesional para mejorar	Es importante porque piensan en la protección de la selva.
Muy bien, pero en el futuro que sea propio, que lo maneje la com. Tiene buen funcionamiento, brinda trabajo a todos, rinden cuentas	Por el momento unos cuantos ganan y no hay mejora	El hotel es muy importante ya que es un centro Ecoturístico que no había visto antes en la amazonía.
Muy bueno. Sirve para combatir la pobreza	Es una empresa comunitaria que esta surgiendo manejada solo por San José	Que sirve para proteger la selva y mantener a la gente lejos de la petrolera.
Por una parte es bueno porque da dinero a la gente. Al inicio muchos no trabajaban y pese a eso recibieron utilidades. Por otro lado es malo por la división. Se perdería si se termina el convenio, si hay la separación	Es rentable el negocio, se esta cumpliendo y estamos en acción, aliviana al pueblo en sus necesidades y además es como una bandera	Yo opino que Kapawi está trabajndo bien con las comunidades cercanas. Pero yo quiero que este año suban el precio de los productos y las visitas y asi seguir trabajando

**Qué opina del ALBERGUE o HOTEL? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
90% está caminando bien, el resto está mal por el sistema de administración en Lima. La reinversión que está pendiente y modificar el convenio para hacer realidad el 50-50 en la toma de decisiones	Es una idea que ha salido de los socios, primera empresa a nivel comunitario	Quisiera que compre mas productos de la comunidad, ya que compran una sola vez al mes.
El personal no se porta bien entre ellos. No hay coordinación. Por lo demás, todo bien	Que se ha hecho hasta ahora un enfoque, le falta a Chalalán entender que es una actividad alternativa para San José, pero no como algo separado, y si sigue así va a ser un problema a futuro	Que hay que mantenerlo bien porque es Reserva y no hay destrucción.
Ha sido una buena idea que fomenta trabajo a los miembros de la comunidad y ahora es el mejor albergue que existe en Madre de Dios	Es una empresa comunitaria y así vista por el país, es manejada por nosotros mismos y si tenemos capacidad de manejarla	Que siga adelante sin fracaso.

**Qué opina de los TURISTAS? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
Algunos son especiales, exigentes, sobretodo con la comida. Pasa rara vez	Están esperando, vienen con expectativas que tal vez no podemos cumplir	No me gusta cuando no entiende el idioma, me gusta que dejan propinas y son buenos y amables
Que sigan viniendo mas. Mas turistas=mas ingresos	Ellos nos dan el trabajo, sin ellos no hay nada	Los turistas compran artesanías y dejan plata y se hacen amigos.
Eligieron bien al venir a Posada porque así ayudan a toda la comunidad en general en la forma de cómo se hace empresa	Son la parte importante para la sostenibilidad de la empresa	Son buenos amigables, se aprende de ellos y dejan plata y regalos. A veces no se respetan entre ellos y toman fotos a escondidas.
Buenos amigos aunque no todos. Piden muchas cosas que no se les pueden dar. Quejas del servicio, luz, colchones	Gracias a ellos San José esta adelantando	Es bueno para conocer sobre sus vidas, y simepre comprarn artesanías en la comunidad.
Buscan ver las cosas nativas pero no ven nada ni ven la comunidad. (Ya no serían muy nativos)	Generan ingresos al país en su conjunto	Me gusta que puede practicar inglés con los turistas.
Muy buenas personas que no sólo dejan dinero sino que también nos dejan aprender de su cultura. Pero lo más importante es la parte social. Ellos son abiertos, conversan con corazón puro. Se aprende de ellos.	Transmiten su cultura el cuidado al medio ambiente y la puntualidad	Me gusta cuando los turistas visitan las comunidades porque así los Achuar quieren mantener nuestra cultura, y compran artesanías . Además dejan regalitos como útiles escolares y dejan propinas.
Son buenos, dejan propinas, ayudan mucho viniendo a ÁPA por las utilidades	Son personas que tienen una formación mas desarrollada y nos dan ideas para mejorar la empresa	Con los turistas se comparten ideas, hay un intercambio de mundos diferentes, dejan ingresos económicos y mandan regalos. Me disgusta que hagan preguntas personales por ejemplo: cuando los Achuar se visten elegantes con corona y se pintan la cara, ellos quieren saber porque o cual es el significado. Los Achuar nunca preguntan sobre costumbres raras de los gringos como por ejemplo cuando tienen arete en la lengua.
Que sigan viniendo, que ingresen a la comunidad y que traigan nuevos proyectos	Es nuestra fuente de ingreso	Los turistas tienen interés por conocer nuestro ambiente y quieren aprender sobre la cultura Achuar.

**Qué opina de los TURISTAS? (una muestra de respuestas)**

<b>POSADA AMAZONAS</b>	<b>CHALALAN</b>	<b>KAPAWI</b>
Que sigan viniendo para que haya más chamba. Turistas vienen a pasear a ver los animales de la selva, a conocer. Algunos son buenos y otros renegones	Dejan algo para beneficio de la empresa, para los empleados y poco para la comunidad	El turista ayuda a defender la reserva de bosque.
Gracias a ellos se aprende el sistema de servicio de turismo	Los turistas vienen a conocer y saber de donde somos, sobre todo cuando nosotros hacemos la noche tradicional, boleando y tocando instrumentos nativos	Los turistas vienen para aprender sobre las plantas medicinales y a pajarear y para ayudar a preservar el medio.
Por un lado son buenas personas que dan la oportunidad tener ingreso interesan en venir y conocer nuestra realidad. Por otro lado son demasiado cuidadosos y recelosos por temor a las enfermedades y por eso a veces no compran alguna artesanía. Tienen miedo de contagiarse en todo.	Están alegres con los guías, son importantes porque nos dan trabajo	Compran artesanías y dejan plata para las medicinas para los hijos si se enferman.
Son buenos. Algunos vienen a la com y toman fotos pero eso no está permitido y se necesita autorización. Una vez uno lo hizo durante una reunión de padres de familia y eso molestó.	Espero que les guste el lugar que tenemos y ellos son los portadores de dinero para nosotros. Gracias a ellos cuidamos el medio ambiente	Siento feliz cuando vienen los turistas, ya que ellos los protegen de la compañía petrolera para que no se introduzca en territorio Achuar. Quieren vivir sin contaminación. Los turistas ven y pueden ayudar para que no les invada la petrolera.
Son buenos. Algunos vienen a la com y toman fotos pero eso no está permitido y se necesita autorización. Una vez uno lo hizo durante una reunión de padres de familia y eso molestó.	Les interesa a los turistas conocer el albergue y saber que somos de una comunidad. Nosotros cumplimos con lo que se les ofrece	Son importantes porque vienen, nos conocen y también les conocemos y hacemos amigos en otros países.
Por el ingreso de turistas se están consiguiendo mejoras y también Ñape está consiguiendo muchas cosas	Ellos son la base para que la empresa siga sosteniéndose, sin ellos no hay desarrollo	Los turistas deberían dar el dinero en la mano durante la visita, no el recibo y los guías informen bien a los turistas para que no haya duda con los clientes.
Gracias a ellos se aprende a conservar el medio ambiente y no cazar	A veces son gente buena y otros aburridos.	A esta comunidad ha llegado solo un turista (antropólogo, investigador de la cultura).