

**Lessons from the Equator Initiative:  
The *Casa Matsigenka* Community-Based Ecotourism  
Lodge Enterprise in Manu National Park, Peru**

Jessica Herrera

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**Sociocultural Anthropology Master Program  
Faculty of Arts  
and the  
Centre for Community-Based Resource Management  
Natural Resources Institute, University of Manitoba  
Winnipeg, Manitoba R3T 2N2 Canada**

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## LIST OF ACRONYMS & ABBREVIATIONS

APECO	<i>Asociación Peruana para la Conservación de la Naturaleza</i> (Peruvian NGO)
CEDIA	<i>Centro para el Desarrollo del Indígena Amazónico</i> (Peruvian NGO)
EMM	<i>Empresa Multicomunal Matsigenka S.R.L.</i> (indigenous enterprise)
COHAR-YIMA	<i>Consejo Harakmbut-Yine-Matsigenka</i> (provincial indigenous organization)
COMARU	<i>Consejo Machiguenga del Río Urubamba</i> (provincial indigenous organization)
Ecotour-Manu ASSC	Association of Manu Tour Operator Agencies (private tourism sector)
FANPE	<i>Fortalecimiento del Sistema Nacional de Areas Naturales Protegidas por el Estado</i> (national project funded by the GTZ)
FENAMAD	<i>Federación Nativa del Río Madre de Dios y Afluentes</i> (provincial indigenous organization)
GTZ	<i>Gesellschaft für Technische Zusammenarbeit - Cooperación Técnica Alemana</i> (German Technical Cooperation, funding agency)
INRENA	<i>Instituto Nacional de Recursos Naturales</i> (governmental institution)
NGO	Non-Governmental Organization
PA	Protected Area
PNM	<i>Parque Nacional del Manu</i> (Manu Nacional Park)

# 1. Introduction

## 1.1 Brief description of research

Community-based ecotourism that is directed by indigenous communities in protected areas may provide them with an ecological and economic strategy that would allow them to diversify their livelihood by adding supplementary income (from the cash economy) to their subsistence lifestyle while also supporting biodiversity conservation. Indigenous groups' innovative initiatives in the tourism industry, a sector in which they have always been marginalized, may open up an array of possibilities for improving their quality of life, particularly in the case of groups living in protected areas of the rainforest. By engaging in community-based ecotourism, they may gain a new perspective on different opportunities and develop ways of managing resources in protected areas. This might also prove to be an environmentally and institutionally sustainable strategy for both socio-economic development and the conservation of biological diversity.

This report presents preliminary findings from fieldwork carried out in Peru on the *Empresa Multicomunal Matsigenka* (EMM), a community-based ecotourism lodge within Manu National Park. This research is one of several Equator Initiative (EI) case studies being conducted through a coordinated team project at the Natural Resources Institute of the University of Manitoba and supported by the International Development Research Centre (IDRC), Canada. The documentation of the research findings will contribute to further refining the theory and practice of collaborative strategies (community-based conservation) for addressing both biodiversity loss and growing impoverishment, particularly in Third World countries.

I wish to acknowledge all the individuals who generously gave of their time by participating in the interviews and focus groups, and who in some cases also provided documentation they considered relevant to this research. I am particularly grateful to the Matsigenka communities and colleagues in the field; without their generous support and participation this study would not have been possible.

## 1.2 Purpose

The purpose of this study is to research the principal lessons learned from the *Empresa Multicomunal Matsigenka* (the Matsigenka Multi-community Enterprise), a pilot project on community-based ecotourism in the Peruvian Amazon concerned with how biodiversity conservation and generation of income for local residents may be simultaneously achieved.

## 1.3 Research objectives

This report primarily addresses the following objectives:

1. To document the role of **community organization** in the development of the EMM
2. To identify and describe the cross-scale institutional linkages of the EMM

## 1.4 Methods

The research employed a case study approach. The case study method is useful for investigating a contemporary phenomenon within its real-life context, and it allows for the analysis of a variety of evidence (e.g., documents, interviews, participant-observation) (Yin, 1989). The unit of analysis in this study is the EMM lodge, *Casa Matsigenka*, which is located in Manu National Park (PNM), within the Biosphere Reserve Zone, in the Department of Madre de Dios, in southeastern Peru (see Figure 1); the headquarters office is located in Cusco. The two

major components of the research were the literature review and the field research. The literature review provided the researcher with a theoretical framework for the study. Fieldwork was conducted from November 2004 to April 2005 at multiple sites (Lima, the capital of Peru; Cusco, a provincial city; Tayakome and Yomibato, which are communities and the ecotourism lodge setting within PNM; and Puerto Maldonado, a city in the province of Madre de Dios).

Data were collected from primary sources: a combination of semi-structured and open-ended interviews, focus groups, participant observation and personal discussions; and from secondary sources, which included reports prepared by consultants, NGOs, researchers and the Peruvian government, evaluation studies of the project; tourism surveys previously conducted by the enterprise, academic articles, publications and theses, videos, websites and brochures.

The researcher conducted a total of 55 semi-structured and open-ended interviews with multiple participants who continue to be directly involved in the EMM at the present time or have been involved in the past (community leaders, EMM managers and staff, NGO personnel, regional and national government officials, researchers, consultants and facilitators), as well as with others who have been directly involved in the ecotourism industry in Manu National Park (tour agency managers and/or owners, tour guides, park guards, the community priest, tourists and academics). A total of 4 focus groups were held: one in each of the two communities, one with the staff of the ecotourism lodge, and one with community leaders. These focus groups were conducted to gather information on opinions and expectations about the EMM, the amount of time they were willing to dedicate to the EMM, and the type of training each one would like to acquire to carry out their work in the EMM. Participatory observation was carried out through involvement at the EMM office and participation in community meetings and social events in order to better understand both the dynamic at the EMM (in the lodge and main office) and also the Matsigenka culture. The researcher also participated in an ecotourism package conducted by a local tour agency in PNM, which employed indigenous tour guides from the EMM.

Finally, with the objective of gaining a clearer perspective on the EMM through comparison, the researcher visited the Ese'ejá Native Community of Infierno, a community-based ecotourism lodge that was a finalist among the projects considered for the 2002 Equator Prize ([www.undp.org/equatorinitiative/secondary/equator\\_prize2002.htm#peru](http://www.undp.org/equatorinitiative/secondary/equator_prize2002.htm#peru)).

The researcher conducted 8 interviews and one focus group there and also visited tourism circuits.

The present technical report aims to respond to a series of questions elaborated by the University of Manitoba research team in order to provide information for comparing case studies. Here the researcher looks at the different stages that the EMM has gone through.

## **1.5 Theoretical background**

With the increasing concern in global politics about environmental degradation, a new perspective on tourism has been proposed since the 1980s which aims to integrate development with biodiversity conservation. This alternative model of tourism is referred to as ecotourism. Campbell (1999) states that definitions of ecotourism vary according to the priorities of actors and analysts. From a global perspective, ecotourism has been introduced as a synergetic strategy that embraces both biodiversity conservation, especially in rainforest areas, and socio-economic development (Bookbinder, Dinerstein, Rijal, Cauley, & Rajourias, 1998; Koziell, 2001; Yu, Hendrickson, & Castillo, 1997). Ecotourism is viewed as a primary “means of avoiding environmental degradation while sharing economic benefits with the local people” (Toepfer, 2001).

Within ecotourism, one alternative model is a community-based approach to conservation and development that promotes empowerment of local people and respect of traditional lifestyles (Belsky, 1999; Campbell, 1999; Langholz, 1999). This alternative model of ecotourism is commonly called community-based ecotourism. Promoters of community-based ecotourism

argue that a locally owned and controlled ecotourism economy will direct proceeds into local hands, provide incentives for biodiversity conservation, support grassroots organizations, and educate both visitors and residents ([anaicr.org](http://anaicr.org) 2002). Moreover, Stronza (2001) claims that “when ecotourism is truly participatory — that is, when local hosts are involved as decision-makers as well as employees — ecotourism can become a transforming experience rather than simply an economic incentive.”

Community-based approaches for conservation and development such as community-based ecotourism work through a network of institutional linkages that involve numerous actors and interests. These linkages can take place at multiple scales and involve institutions linked across different levels of organizations (vertically) and across space (horizontally) (Berkes, 2003). Vertical linkages refer to the hierarchical relationships of different organizations, from local institutions to international organizations. Horizontal linkages may include a community network involved in resource management initiatives as well as the experience that results from this exchange. These horizontal and vertical institutional interconnections are known as cross-scale linkages (ibid). Obtaining a better understanding of the cross-scale institutional forms of linkages and their role in the success of initiatives is central to identifying lessons learned from a research project. Additionally, by understanding the consequences of involving governmental and non-governmental institutions, it may be possible to suggest tools that could be used by community groups, government, and NGOs to maintain and enhance support for strengthening local institutions.

Community-based ecotourism can bring different benefits to an indigenous community, such as empowerment in decision-making on resource management and also supplementary income for local people. However, there are issues related to this type of community development that are more complex and profound. This development model is proposed and promoted to native communities (and maybe imposed on them) by external actors whose interests are mainly market-driven. The model not only reflects an unequal power relationship between the multiple stakeholders in the context of conservation, development, and ecotourism (the environmental conservation entrepreneurs and *professionals* in tourism and marketing, governmental and NGO personnel, and the native people who are “the unskilled forced labour” — that is, the white upper middle class fraction and the indigenes), but it also reflects the western values that predominate in promoting integration into the monetary market economy, which may contribute to the *cultural homogenization* of societies over the long term.

From my perspective, the restoration of local people’s rights as actors in tourism (for instance, their rights to recreate and reinvent their identity) is a primary concern. However, undertaking an ecotourism project always involves multiple local and non-local interests that are in competition with each other (Lanfant, 1995). The images projected through ecotourism (e.g., the “noble salvage” in harmony with “pristine” nature) are mainly produced and managed by international tourism marketing interests that are concerned with meeting western tourism’s hunger for authenticity. This process of commoditization of ethnic identity, in which identity is a product manufactured and packaged according to marketed procedures (ibid), both challenges and limits local people’s capacity to “negotiate” their fragile and dynamic identity (but not their agency, i.e., their capacity to continue to recreate their own identity). Nonetheless, ecotourism, as a form of the international tourism phenomenon, and as a mainstream discourse of sustainable development, constitutes a *paradox*. Participatory ecotourism produces both positive and negative impacts for the communities involved (Duffy, 2002). It supports some cultural aspects of ethnic minority cultures; it may strengthen community organization and economic sufficiency; and marginalized local groups may be empowered through participation in decision-making processes and ownership. However, ecotourism also intervenes in the definition of values, and the redefinition and marketing of identities. Furthermore, it is a main factor behind cultural homogenization of societies. That being said, ecotourism can also act as the political and cultural

ground on which *negotiations* are taking place as a form of struggle and resistance by indigenous groups that interface with both tradition and modernity.

## 2 Background information

### 2.1 General information on Peru

Peru is a multicultural and multi-ethnic nation with an ancient history. It has great cultural diversity that includes approximately 96 different ethnic groups, which together constitute a total population of 27.5 million. Peru is the third most “mega diverse” country in the world due to its biological diversity (Ohl, 2005). Peruvian territory consists of one of the most diverse ecosystems in the world: it contains the tropical Andes; one of the most threatened hotspots; one of the most relevant wildlife tropical zones; and the rainforest of Peru, which is one of the largest in the world (700,000 km<sup>2</sup>) (Herrera, 1989). Nowadays, tourism is the second-largest contributor of foreign currency after mining. Tourism represents: a) 1 million tourists per year; b) it generates approximately US \$ 1,200 million in profit annually; and c) it supports 500,000 jobs directly and indirectly related to the sector (Chavez, 2004).

Ecotourism, particularly in the rainforest of Peru, has grown rapidly since the mid-1980s (Yu, et al., 1997). The number of ecotourism agencies has increased tremendously due to the growing demand for this type of alternative tourism. However, the lack of a certification program for ecotourism agencies has meant that there is no guarantee that tour operators will practice ecotourism as it is commonly defined. As a result, a number of “ecotourism” agencies in Peru may be using “ecotourism” primarily as a label to attract “eco-tourists”

### 2.2 Manu National Park (PNM), indigenous inhabitants and ecotourism

One of the most well known areas for ecotourism in Peru is Manu National Park (PNM), which is located in southeastern Peru between the departments of Madre de Dios and Cusco, in the provinces of Manu and Paucartambo respectively (Smith & Huaman, 2001). PNM covers 1,533 million hectares of land and is the core zone of the Manu Biosphere Reserve, one of the largest protected areas of tropical rainforest in the world (Shepard, Rummenhoeller, Ohl, & Yu, in press). Shepard, et al. (ibid) state that PNM was founded on the deep contradiction of “untouchable” forest which is in fact home to various indigenous populations, including the Matsigenka<sup>1</sup>. The Matsigenka, among other ethno-linguistic groups, have been moving around the Manu and Madre de Dios watersheds since before 200 BC (Huertas & Garcia, 2003). The Matsigenka as well as other indigenous groups<sup>2</sup> are “refugees from the violence of a savage global economy” – they are survivors of persecution and exploitation (including slavery) by rubber harvesters, woodcutters, *haciendas*, missionaries, and others – who manage to survive by isolating themselves from outsiders, and they have been living in settlements around Manu River since the 1960s (Shepard, et al., in press).

The two Matsigenka communities, Tayakome (with a population of 200) and Yomibato (with a population of 220), were recently recognized (1988)<sup>3</sup> by the government (Figure 1). Tayakome was established as a result of the influence of Protestant missionaries of the Summer

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<sup>1</sup> Amazonian ethnic group that belongs to the Arawak linguistic family, the largest in the Amazon of South America. Nowadays, they are the largest group in PNM.

<sup>2</sup> Which include the Yora (Nahua), Mascho and Mashco-Piro, Piro (Huertas et al., 2003).

<sup>3</sup> These are the only communities legally recognized within PNM, but which do not hold land titles. (Chinchiquiti, 2000). There are also “non-contacted” people living within Park boundaries, some of them Matsigenkas who are partially in contact, particularly with Yomibato (Shepard, personal communication, February, 2005).

Institute of Linguistics (SIL), who in the early 1960s settled there to evangelize the population; they also built a school and provided educational and medical services (Shepard, 2002; Shepard, et al., in press). The eviction of the SIL missionaries soon after the establishment of PNM (1973) created a vacuum in basic services for the Matsigenkas, which resulted in emerging tensions within the community and caused the separation of one group, who moved to a more remote location that later became known as Yomibato (1980s) (Chinchiquiti, 2000; Shepard, et al., in press).

Since the middle of the 1980s some tour agencies have started to bring tourists to Manu National Park. During this time the tour agencies have promoted adventure tourism in which nature equals adventure and Manu equals “Amazonian paradise” with spectacular fauna and flora. Then, during the 1990s the increasing demand from “ecotourists” led tour agencies to promote “ecotourism” as a marketing label. From the beginning, only tour agencies from Cusco have been making a good living through bringing European and North American tourists to Manu land. In my fieldwork I learnt that approximately 70% of these companies are owned by foreigners.

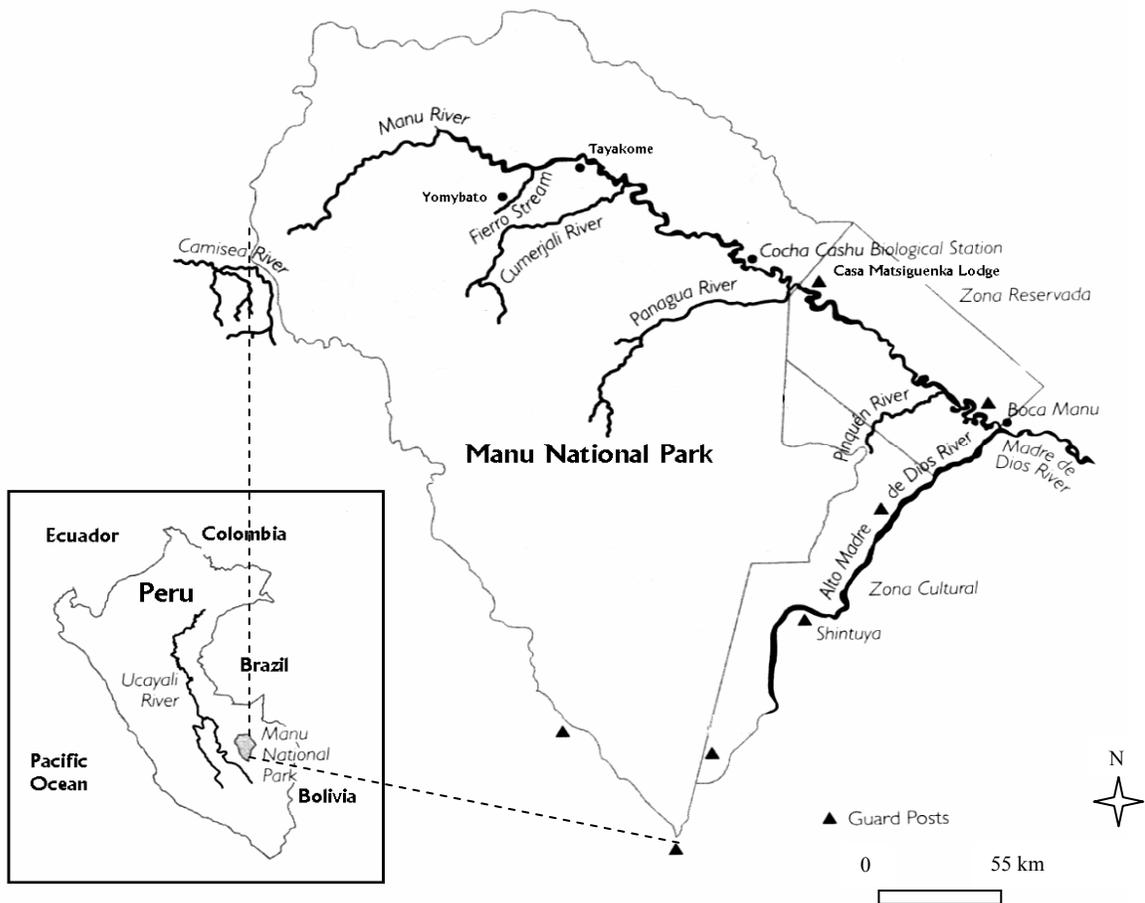


Figure 1. Peru and the study area, Manu National Park, showing the two communities, Tayakome and Yomibato. Casa Matsigenka lodge is an 8-hour boat trip downriver to the closest community (Tayakome), and two days or more from the more remote community (Yomibato) (Source: Map adapted from Shepard, 2002).

### **2.3 The *Empresa Multicomunal Matsigenka* (EMM): An indigenous ecotourism enterprise**

The Matsigenka leaders of the communities of Tayakome and Yomibato decided to participate in the tourism market, but without giving up their territories or abandoning their traditional means of livelihood. Beginning in the early 1990s, they started putting pressure on PNM officials to allow them to develop an economic alternative as compensation for the restrictions placed on them due to living in a protected area. The Matsigenka leaders' main interest has been to steer some economic benefits from tourism towards their communities in order to improve their quality of life. I decided to study the EMM because it is a project that has emerged from a very grassroots level and with a strong sense of autonomy. From an anthropological perspective this case allows a look at the indigenous drives towards ecotourism.

The EMM is a partnership of the two Matsigenka communities in PNM, both of which are willing to negotiate with, and learn from, various institutions and people in the conservation endeavor and the tourism market. I find it important to pay attention to this type of local community effort; I understand "local" to mean a group of people who have a deep historical connection to their culture and environment. In the proposal presented by the Matsigenka communities to the 2002 Equator Prize, they expressed their discomfort with top-down conservation and the international tourism industry in their territories (e.g., the marginalization and commodification of their cultures as Amazonian tourism attractions). Instead of being passive, they are putting a great deal of effort into creating their own indigenous ecotourism enterprise, in accordance with particular priorities. They are broadening the parameters of doing business and dealing with global processes, while exploring in truly participatory terms an approach for sustainable development and conservation.

## **3 Major Findings and Discussion**

### **3.1 Contact information**

Casa Matsigenka Lodge: *Quebrada Salvadorcillo*, in the Reserve Zone of Manu National Park, Province of Madre de Dios, Peru.

Headquarters office: Av. Sol 627 "B", of. 305, Cusco, Peru

Key Person: Margot Valer (Assistant Manager)

### **3.2 Community organization**

#### *3.2.a Origins of the project*

##### *i) Date of community initiation*

The indigenous leaders of Tayakome and Yomibato, the two communities that own the EMM, stated that they began to explore the idea of creating a Matsigenka lodge in the early 1990s. Between 1992 and 1996 the two Matsigenka communities, in collaboration with outsiders and NGOs, repeatedly requested land concessions from the Peruvian Department of Natural Resources (INRENA) in order to build their Matsigenka lodge within Manu National Park (PNM).

##### *ii) Date of formal establishment (EI date)*

The project planning process for the establishment of the lodge started between July and August 1996, when INRENA officials visited the indigenous communities of PNM with the objective of supporting the development of the Matsigenka lodge project. In 1997 the two

Matsiguenka communities formed the enterprise, *Empresa Multicomunal Matsiguenka S.R.L.* (EMM), and constructed the *Casa Matsiguenka* tourist lodge. This lodge enterprise was formally established as a *pilot project* through agreements between INRENA, the German Technology Cooperation (GTZ), and the two indigenous communities, under the auspices of the EMM. INRENA and the EMM signed a 20-year renewable agreement in which a 6-hectare land concession was granted to the communities for tourism purposes. In exchange, the indigenous enterprise committed to give 5% of their monthly profit to the PNM office.

*iii) What inspired or precipitated the project? What were the sources of inspiration for the project?*

The need to find a sustainable strategy that would ensure biodiversity conservation while compensating the indigenous communities within PNM pointed towards ecotourism as the best solution.

Since the creation of PNM in 1973, the indigenous people have lived under restrictions within the Park. They have been prohibited from using guns and from commercializing any resources from the forest. This situation has made it difficult for the Matsiguenka to conduct trade or to obtain monetary income unless they emigrate to other territories. Therefore, the Matsiguenka leaders have constantly asked the PNM officials to compensate them and requested an economic alternative that would provide them with some monetary income.

*a) Whose idea was it? Locals, outsiders, government, NGOs, etc.*

Several interviews with locals and outsiders revealed that a North American biologist brought the idea of ecotourism as an alternative business for the Matsiguenka in PNM in the early 1990s. He belonged to Wildlife Conservation International and was conducting research in PNM. This person proposed that the Matsiguenka in Tayakome work together on tourism as a way to obtain some economic benefits. In 1992, the Matsiguenka from Tayakome community, together with the biologist (researcher) and a NGO, built the first setting for an ecotourism lodge. But PNM officials considered the project illegal and its continuation was prohibited. The biologist and the ecotourism NGO were banned from entering PNM. The Matsiguenka leaders from Tayakome were disappointed and saw their relationship with the PNM officials fall into a deep(er) crisis.

*b) Trigger event & Catalytic element*

In 1987, the first concession of land in PNM was given to a private tourism agency to build a lodge on a 10-hectare site within the Reserve Zone of PNM (Rummenhoeller, 2000). Between 1994 and 1995 more land was given as concessions to other private tour agencies, and they were given permission to build their own campsites. These events triggered NGOs like CEDIA<sup>4</sup> to propose the concession of 40,825 hectares of land within the PNM for the benefit of the Matsiguenka communities so they could build an ecotourism lodge. Such a project was proposed as a way of compensating the Matsiguenka for their lack of land title and for the prohibition against commercialization of natural resources. So, in 1994, CEDIA formally presented the first Matsiguenka lodge project proposal to INRENA, asserting that it was written based on a request expressed by the indigenous communities (Rummenhoeller, 2000). INRENA did not approve the project proposed due to an apparent lack of technical and economic support (INRENA & Sociedad Zoológica de Frankfurt-Coppin & Asociados, 2004; Rummenhoeller,

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<sup>4</sup> CEDIA is a NGO that works for recognition of land title and other indigenous rights of Amazonian indigenous groups in Peru.

2000). In spite of this result, the indigenous communities' leaders persisted in requesting approval for the lodge project.

In 1995, in the absence of any response from PNM officials, the leaders of the two Matsigenka communities within PNM and the Matsigenka regional organization (COMARU<sup>5</sup>) wrote a letter to the Ministry of Agriculture complaining of the negligence on the part of the PNM officials. In support of their claim, leaders of surrounding indigenous communities wrote a letter to the President of Peru (Alberto Fujimori) asking for the immediate approval of the Matsigenka lodge project. Furthermore, the national newspaper *La República* wrote an article that reported on the struggles of the Matsigenka communities in the PNM to gain approval for their lodge project (INRENA, et al., 2004). Additionally, the FANPE<sup>6</sup> project, which was based on an INRENA-GTZ agreement, included a budget for INRENA to implement better management of the designated protected areas in Peru.

In sum, the trigger events and the catalytic elements for the Matsigenka lodge project were a combination of factors: 1) outsider influence brought the idea of ecotourism; 2) the desire of the Matsigenka communities in PNM to have an economic alternative; and 3) the pressure that the indigenous communities and NGOs exerted on INRENA authorities (at a regional and a national level) to take action to improve the Matsigenka's living conditions by giving them an economically sustainable alternative.

### 3.2.b Leadership and key people

- i. *Individuals: locals and/or outsiders. What role did they play? How did their role change during the course of the project?*

“The Matsigenka who have worked on the lodge project are the true leaders.”  
(Former FANPE consultant for the EMM monitoring plan, 2005)

## **Local leaders**

A number of community leaders, such as the presidents of the communities as well as some new leaders, have emerged through the processes of establishing and developing the EMM. The new leaders tend to be young indigenous males who have received some formal education, speak Spanish (although limited), and have been exposed to western ideas. These new leaders are Matsigenka who feel comfortable having contact with outsiders.

The roles of the EMM leaders have changed during the project development (see Table 1). For example, the community leaders have played a key role in getting authorization for the lodge project. After the lodge project was approved, these leaders took on various responsibilities in organizing their communities and allowing new leaders to emerge.

- **The managers (*gerentes*)**

New leaders have emerged in the planning and development process of the lodge project. The most active community members in the project were elected by their community as *gerentes*, who have worked together with the supporting institutions (i.e., GTZ/FANPE, INRENA, APECO<sup>7</sup>). Since the beginning of the lodge project, each community has elected a manager every two years.

During the first two years of the lodge project, the construction phase, the managers' main responsibility was to organize their people to participate in the construction of the lodge.

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<sup>5</sup> Consejo Matsigenka del Río Urubamba

<sup>6</sup> Fortalecimiento del Sistema Nacional de Áreas Naturales Protegidas por el Estado (FANPE)

<sup>7</sup> Peruvian Association for the Conservation of Nature (APECO)

Other responsibilities have been: 1) to inform the community about problems related to the lodge; 2) to make decisions, with prior approval from the communities, on important issues related to the lodge; and 3) to represent the EMM at any meeting within or outside the community. With the operation of the ecotourism lodge the managers' responsibilities have been refocused and increased: 4) to be in constant radio communication with the assistant manager from the headquarters office in Cusco, 5) to train new staff about the maintenance of the lodge, 6) to manage the operation of the lodge *in situ*, 7) to welcome and guide the tourists, and 8) to administer the handicrafts that the communities have sent to be sold in the lodge and to deliver the profits to the community producers.

- **School Teachers**

School teachers have had a strong influence on the communities. In this sense, their opinion about the EMM has had an impact on the Matsigenka communities. Also, they have played a “public relations” role on behalf of the communities because the teachers speak and write very well in Spanish (Rummenhoeller, 1998; Shepard, 1998). Some participants of the project have expressed their concern that the teacher from Yomibato is not totally convinced of the benefits of the EMM. These participants think that his opinion might be affecting Yomibato members' participation in the EMM (see Box 1).

**Outsiders** (key people)

- **Assistant Manager of the EMM**

“It took me many years to develop a relationship of trust with the Matsigenka people.”  
(Assistant Manager of the EMM, 2005)

As soon as the headquarters office for the EMM was set up by FANPE in Cusco in 2000, a tourism specialist (a woman from Cusco) was hired to be the assistant manager of the EMM. The assistant manager has played a very important role in the decision-making process of the indigenous enterprise. The assistant manager has various responsibilities:

1. to coordinate with the various institutions outside of the communities, such as INRENA personnel tour agencies<sup>8</sup> and other tourism stakeholders in PNM,
2. to ensure that legal requirements, such as accounting, comply with the law; and to do bank transactions,

**Box 1. Leadership crisis in the Matsigenka communities?**

In 2004 and 2005, particularly in Yomibato, there seems to be a lack of interest among most of the Matsigenka to take on the role of manager (*gerente*) because it involves many responsibilities outside of their traditional activities. Besides having to stay in the lodge for long periods (i.e., one to two years away from the community), managers have to take care of their families, which sometimes also stay at the lodge. This means that they cannot eat traditional food because they cannot hunt, fish, or cultivate land around the lodge area. Their diet is based on western products that they are not used to (pasta, rice, canned food). An indigenous leader from Tayakome, who had been manager for almost five years, stated that he was about to turn into a “gringo without land” because wild animals were destroying his agricultural plot while he worked in the lodge; therefore, he quit the lodge. Also, Shepard (1998) observes that there is a fear among the *gerentes* about being identified as *curaca*<sup>9</sup>, which is a negative figure in the Matsigenka culture. Within the Matsigenka there is a strong sense of democracy and resistance to any tendency for a powerful group to emerge; at the same time, the Matsigenka culture cultivates modesty, rather than “egocentrism”, as a good human quality, which inhibits the Matsigenka from standing out as leaders. This cultural characteristic may influence the lack of interest among the Matsigenka to take on the role of *gerente* (Shepard, personal communication, February 2005). Moreover, in Yomibato many people were discouraged from participating in the project because there were rumors within and outside of the communities about the misuse of money and power usurpation; Shepard advises to reinforce training so that more Matsigenka will be able to assume the responsibility of *gerentes*, and thereby avoiding that “*curacas* of tourism” emerge (*ibid*).

<sup>8</sup> Since the Matsigenka are almost isolated, the assistant manager has a key role in representing and developing business relationships with other stakeholders of the ecotourism industry in PNM.

3. to maintain daily radio communication with the Matsiguenka managers,
4. to report to managers and communities about the administration of the EMM and any profit, and
5. to assist the managers and communities in making decisions about the EMM and the lodge, for instance, problems that involve knowledge with which they are unfamiliar such as the modern technological needs of the lodge.

ii. *Key organizations: locals and/or outsiders. What role did they play? How did their role change during the course of the project?*

“This project has survived not because of the NGO support, but because of the indigenous communities. The Matsiguenka have made sacrifices and persisted in the project.”  
(Anthropologist & Matsiguenka interpreter, personal communication, February 2005)

### **Local organizations:**

- **Tayakome and Yomibato: two Matsiguenka indigenous communities**

Tayakome was the community that first started to seek opportunities to work on an ecotourism lodge in PNM, seeing it as an option to obtain monetary income. Based on a suggestion made by INRENA, they invited the neighboring community of Yomibato to join them in the project. In 1997, these two indigenous communities formally established a joint venture: the *Empresa Multicomunal Matsiguenka S.R.L.* (the Matsiguenka Multi-community Enterprise). Since then, Tayakome and Yomibato have worked as business partners and co-owners of this Matsiguenka lodge enterprise, sharing 50/50 the benefits from enterprise revenues.

Despite the help that these communities have received to create their EMM, none of the institutions has put as much energy into the project as the two indigenous communities themselves. However, participation from both communities has not been even. According to some interviewees, Tayakome’s community members have been keener in participating in the development of the EMM while people from Yomibato have been often hesitant about their time investment in such a project. However, some members from Yomibato have expressed feeling marginalized by the EMM, because most project-related activities have been held in Tayakome<sup>10</sup>.

### **Outsider organizations**

(Table 1 summarizes the role of the following institutions in the EMM)

- **Instituto Nacional de Recursos Naturales (INRENA)**

Located in Lima, the capital, INRENA’s central office is responsible for the administration of the protected areas in Peru. This governmental institution also makes sure that people in and around those territories obey the Law of Protected Areas (*Ley de Areas Naturales Protegidas, Ley N° 26834*) (INRENA & PRO-MANU, 2003).

On the one hand, the institutional role of INRENA in relation to the EMM is to make sure that the law is followed in all initiatives undertaken by this Matsiguenka enterprise. On the other

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<sup>9</sup> *Curaca* is a very powerful figure in the Matsiguenka social imaginary. It is a dominant figure that emerged from the social relationship with the outside world. The *curaca* is a leader with socio-economic power who because of his knowledge of the official language and both cultures (in this case, the Matsiguenka & the western world) mediates between the indigenous population and the economic relationships with the western world (Shepard, 1998: 5-6).

<sup>10</sup> Geographically, Yomibato is much more isolated than Tayakome; this factor has influenced the rate at which outside participants of the lodge project have visited Yomibato compared to the more frequent visits to Tayakome.

hand, INRENA is responsible for supervising the process of executing this pilot project (Rummenhoeller, 2000).

The EMM received strong support from INRENA's central and regional office during the first years. INRENA got the funding for the EMM through the GTZ. It seems that changes among the officials at the INRENA and GTZ administration offices have affected their relationship with the EMM because new officials usually shift priorities and often lack a political approach towards indigenous people in the protected areas.

- **INRENA headquarters office for Manu National Park (PNM)**

Located in Cusco, the headquarters office of INRENA manages PNM in coordination with the park guards who control the area. The INRENA central office fosters the EMM, and the PNM office "formally" assumes the responsibility for the development of the EMM. According to testimonies, it seems that the INRENA headquarters office had had a close relationship with the indigenous communities in the establishment and development of the EMM project, but it has not been clear about the rules that should be applied to this indigenous enterprise.

- ***Fortalecimiento de las Areas Naturales Protegidas por el Estado (FANPE)***

Through FANPE, a project funded by GTZ to support the Peruvian national park system, the German institution facilitated funding and personnel to collaborate in the development of the EMM. FANPE was responsible for the management of the project's budget.

- **Peruvian Association for the Conservation of Nature (APECO)**

This Peruvian NGO participated in the EMM project from 1998 until 2002. APECO was in charge of managing the budget for the construction of the *Casa Matsigenka* lodge and for organizing training workshops for the two communities involved in the EMM. Specialized personnel from APECO with extensive experience in working with Amazonian communities developed five training workshops during four years. The workshops aimed to strengthen the Matsigenka communities' cultural identity and to transfer knowledge in order to enable the Matsigenka to manage their tourism enterprise.

### *3.2.c Funding and other resources*

INRENA obtained funding from the GTZ to implement the EMM. INRENA and the GTZ signed an agreement in which the latter committed to provide funding and support through their FANPE project. The GTZ provided the funding to FANPE from 1997 to 2003, which was used for transportation, construction material for the *Casa Matsigenka* lodge, the various training workshops, and the establishment of the EMM headquarters office in Cusco. A total of US\$ 110,000.00 was invested by the GTZ, which was distributed as shown in Figure 2.

FANPE was responsible for managing expenses for the planning and establishment of the EMM. It also provided consultants and facilitators to assist in this project. INRENA provided logistical support whenever it was required (e.g., boat and truck transportation).

- i. Human resources for initial organization*

- a. Volunteer support from pre-existing groups*

The *Casa Matsigenka* lodge was built using *faena*, which is a type of community volunteer based organization system that the indigenous communities used to organize themselves by means of a rotating system: groups of families (men, women and children) traveled from the communities to the lodge site and worked voluntarily, taking turns with other

Matsiguenka families every two weeks. The *faena* system was used first to prepare the forest land for the lodge and second to build the lodge infrastructure.

*b. NGO and government personnel providing their time or services for free*

There was a high level of commitment from NGO and governmental personnel involved in the EMM project; the personnel from the various governmental and NGO institutions often worked in their free time, staying in PNM longer than expected and traveling whenever necessary to resolve problems and move the project forward (Rummenhoeller, 2000).

PNM officials who participated at the planning stage of the EMM project helped the Matsiguenka with even the smallest details. For instance, to be able to establish the EMM the Matsiguenka had to have their citizenship papers (most of them did not), so the PNM officials helped them to fill out the paper work and obtain their documentation. This assistance was not formally part of the EMM project, but it was necessary that the indigenous become citizens for the project to continue.

*c. Enlisting free help from outside groups.*

There are several researchers who have been working with these communities for many years. These people have helped the Matsiguenka community project by writing letters and preparing proposals, reports and other documents. For instance, one researcher who speaks the Matsiguenka language has been participating in the EMM meetings and doing translations. This help has been provided for free. Likewise, the EMM occasionally have not paid transportation fees when their goods have been sent to the communities or the lodge site; they have benefited from the good will of the people who own/manage the boats (e.g., Governmental/NGO officials, PNM staff, researchers, tour guides, and a few tour agencies).

*d. Were there pre-existing relationships between these groups and the community?*

Apparently the main relationship these communities had was with researchers and NGOs that often brought donations and/or conducted trade with the Matsiguenka people. The EMM project helped to develop better relationships between INRENA and the Matsiguenka communities in PNM. Some indigenous leaders feel that they have “new friends”, like the assistant manager of the EMM (see Box 2), some tour guides, and other people they have met through the EMM.

**Box 2. Access to new sources of assistance for the Matsiguenka communities**

Through the establishment of the headquarters office in Cusco, the assistant manager has been helping the indigenous people beyond her formal duties. For example, some sick Matsiguenka had to travel to the city to receive treatment. They traveled and received health assistance thanks to the constant support of the assistant manager of the EMM. The relationship between the assistant manager and the Matsiguenka in PNM has grown; on some occasions she has assisted some young Matsiguenka to move to the city, helped with personal money transactions, and facilitated the sending of clothes or other goods to the Matsiguenka in PNM, etc. In sum, access to this type of support would not have been possible without the project.

*ii. Use of free facilities*

APECO donated radio devices to the communities and to the EMM; the GTZ donated solar panels and the water system for the *Casa Matsiguenka* lodge.

*3.2.d Knowledge*

*i. Sources of knowledge: local/TEK and/or outside knowledge*

The EMM has benefited from a combination of indigenous and outside knowledge and technology. The Matsigenka and the outside participants in the project have worked together on the planning and establishment of the EMM. Traditional knowledge in particular has been incorporated in the *Casa Matsigenka* lodge project.

ii. *If there is local knowledge and if relevant, who holds this knowledge?*

Traditional indigenous knowledge was used in preparing the forest land for the construction of the lodge infrastructure. Most construction material came from the area and was also provided by the Matsigenka. The lodge was built by men, women and children from Tayakome and Yomibato, with the participation of some outside personnel for specific tasks (e.g., an architect and specialized construction personnel).

The lodge architecture followed Matsigenka style throughout the whole setting, and the look of a traditional Matsigenka household was reproduced. Women prepared the *crisnejas*<sup>11</sup> for the roofs of the lodge cabins (Rummenhoeller, 2000).

The lodge staff (who are all Matsigenka men) occasionally guide tourists and provide information about the fauna and flora of Manu forest and about how they use them in their traditional activities. Additionally, most of the craft work sold in the lodge is made by women and elders from both communities. Exceptions are the bows and arrows, and some specific crafts that are made by men.

iii. *If there is outside knowledge used in the project, was there capacity building (education, training, knowledge exchange)? Who was involved in providing capacity?*

“The workshops were always done with the attendance of community leaders and managers ... We always said that this experience was part of a process; we’ll learn step by step...”  
(APECO consultant, 2004)

The enterprise, lodge and eco-tourism are all new concepts that were introduced to these Matsigenka by outsiders. APECO personnel provided training workshops to the Matsigenka during the first four years of the project. The main purpose of the workshops was to strengthen the Matsigenkas’ cultural identity while transferring knowledge to the Matsigenka so they could work in tourism (see Table 1). Besides APECO personnel, other people have taught the Matsigenka practical technological knowledge. For instance, the Matsigenka learned to use radio equipment and gained basic knowledge about water and solar panel systems from technicians hired by the EMM.



Casa Matsigenka Lodge in PNM

<sup>11</sup> *Crisneja* (*Chamaedora spec.*) is a palm leaf that Matsigenka women weave to make roofs for their houses.

A group of Matsigenka leaders from the EMM had the opportunity to visit other indigenous lodge projects. For example, they visited the Ese'ejá Native Community of Infierno in Madre de Dios, Peru, which runs the Posada Amazonas lodge; they also visited the Mayangua and Misquitos in Nicaragua, and shared experiences about working in ecotourism. They also participated in international events such as The World Ecotourism Summit-Quebec, in 2002. All of these activities were very enriching experiences for the Matsigenka leaders; they exchanged their knowledge and visions of a better future with other indigenous people that work in tourism. Also, Matsigenka leaders made new friends and had the extraordinary opportunity to visit and learn about different places beyond their rainforest territories.

iv. *Were there other ways of integrating knowledge systems?*

“As soon as I arrive at the Casa Matsigenka lodge, I stop acting like a tour guide and transform myself into an interpreter between two cultures: the Matsigenka's and the tourist's, translating everything that the indigenous guides say to the tourists and vice versa.”  
(Manu tour guide, 2005)

The lodge was built by integrating modern architectural designs with Matsigenka architecture. This characteristic of the lodge was an essential factor for the Matsigenka peoples to feel a sense of identity within the *Casa Matsigenka* lodge.

The Matsigenka have been learning to act as guides through observing how outside tour guides interact with tourists at the lodge. These Matsigenka guides offer their interpretation of nature only to the tourists or tour guides who request their service while staying at the lodge. One of the outside tour guides interviewed, who brings tourists to the Matsigenka lodge once a month, mentioned that prior to arriving there she prepares her tourist groups by giving them information about the Matsigenka culture and the Matsigenka lodge project. Once they are at the lodge she asks the Matsigenka staff to act as guides. Also, on the third and last evening of the tourists' visit to the lodge, she organizes an “intercultural meeting” in which the Matsigenka and the tourists share a table and answer questions about each other's culture. In this way, as in the training sessions, the Matsigenka and their international guests learn about each other's worlds, their ways of thinking and their different perspectives.

v. *Were there learning networks (self-organized groups consisting of people from different organizations, who are engaged in problem-solving, subsequently recycling their experience to tackle new problems)?*

During the first years of the EMM, a coordination committee was formed by the supporting institutions, the managers and the community leaders. They met periodically to discuss problems and to propose solutions. Unfortunately, this committee has been inactive over the past two years. Also, the training workshops provided a space for discussing any concerns coming from the Matsigenka. Because there was usually a diversity of backgrounds and experiences represented at these activities, unique solutions could be found. However, some issues are taking a longer time to resolve such as the tour trails reserved for the exclusive use of the Matsigenka lodge and the designation of a specific area for agricultural cultivation (*la chacra*)<sup>12</sup>.

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<sup>12</sup> Section 3.3.e explains this issue in more detail.



*Casa Matsigenka*  
lodge manager  
teaching tourists  
how to hold a bow  
and arrow, PNM,

### 3.3 Cross-scale linkages

#### 3.3.a Identification of main stakeholders

The EMM is a partnership between Tayakome and Yomibato, two Matsigenka communities that have received support from governmental organizations and NGOs. Section 3.2.b describes the roles of the key individuals and organizations in the EMM. See also Table 1 and Table 2. As an ecotourism enterprise that began as a *pilot project*, it has provoked both supportive and non-supportive reactions among the various stakeholders in the PNM, particularly within the private tourism sector.

#### 3.3.b Institutional linkages related to the project

Figure 3 shows the cross-scale interactions of stakeholders and the institutions that have intervened in the establishment and development of the EMM and the Casa Matsigenka lodge; from 1996 to 2003 the EMM received financial support from FANPE. Figure 4 shows the cross-scale interactions of the stakeholders in the EMM in 2004 and 2005.

#### 3.3.c Key horizontal institutional linkages

##### i. facilitating/enabling the project

Since the beginning of the project, the strongest horizontal linkage has developed between the two indigenous communities that established the EMM, *Empresa Multicomunal Casa Matsigenka*, in 1997<sup>13</sup>.

<sup>13</sup> The formal establishment of this Matsigenka enterprise was GTZ/FANPE's condition for providing funding. The GTZ's other condition was a formal agreement between INRENA and the two Matsigenka communities for the execution of the Matsigenka project (Rummenhoeller, 2000).

Through the implementation of the EMM, an important horizontal linkage developed between GTZ/FANPE and APECO (1997-2002). Personnel from FANPE got in touch with APECO, an NGO that is well known for its experience in working on environmental education projects with different Amazonian indigenous communities. APECO and the GTZ signed an agreement in which the former was contracted to manage the first stage of the Matsigenka project. The Terms of Reference for APECO stipulated its responsibility to administer the budget and to provide training to the Matsigenka (FANPE-INRENA-GTZ, 2000; Rummenhoeller, 2000). Another linkage has been established between the personnel of GTZ/FANPE and the EMM through the assistant manager of the EMM. Unfortunately this horizontal linkage ended in 2003, when GTZ funding support was shifted towards other regions of Peru.

In 2004 and 2005 a solid horizontal linkage exists between the managers from the two communities and the assistant manager of the EMM. There is fluid communication and improved coordination between these groups. The assistant manager reports every day by radio to the manager on duty at the *Casa Matsigenka* lodge. They communicate regarding the operation of the lodge and the weather conditions, and they also coordinate supply shipments to the lodge, new tour bookings, and other issues. The assistant manager of the EMM also prepares annual economic reports which are presented regularly at community meetings.

The EMM has developed good horizontal linkages with a couple of private tour operators from Ecotour Manu ASSC<sup>14</sup> in Cusco. These tour operators have committed to bringing tourists to the *Casa Matsigenka* lodge on a regular basis. One of the tour agencies brings tourists once a month. In exchange, the indigenous enterprise offers them a special discount on rental fees. However, new alliances are necessary for the EMM to become a profitable business (see Box 3).

ii) *as  
barriers/hindrances  
to the project*

One horizontal linkage that has acted as a hindrance has been CEDIA NGO. GTZ/FANPE reported that CEDIA's influence has been a serious threat to the EMM because its personnel have

been constantly spreading rumors and creating mistrust about the EMM. This was especially the case during the first years of the project (FANPE-INRENA-GTZ, 2000). CEDIA presented a formal complaint to the ombudsman's agency in Peru (*Defensoría del Pueblo*) against INRENA, it appealed the institution's formal rejection of the *Casa Matsigenka* technical project and it even accused the project of intellectual property theft (*Defensoría del Pueblo*, 1998; Shepard, et al., in press). This accusation had a negative effect on the Matsigenka communities as they felt discouraged in their effort to develop their own enterprise and felt particularly offended by CEDIA's allegation of ownership of the *Casa Matsigenka* project. The Matsigenka communities felt that the project belonged to them (FANPE-INRENA-GTZ, 2000; Rummenhoeller, 2000; Shepard, 1998). As a result,

**Box 3. New Alliance**

The EMM has been asking INRENA to allow it establish business alliances with independent private tour operators. Since 2000, only eight private tour agencies have been allowed to operate in PNM. These tour agencies are members of the Ecotour-Manu ASSC<sup>14</sup> and they signed exclusive agreements to gain land concessions and operate within PNM in exchange for paying annual fees to the PNM office. The PNM-Ecotour-Manu ASSC agreement has produced a monopoly in PNM. Recently, during the process of completing this technical report, INRENA approved changes that would allow the EMM to partner with other tour operators (assistant manager of the EMM, personal communication, September 2005).

<sup>14</sup> *Asociación de Ecotour Manu* (Ecotou -Manu ASSC) is the association funded in 1992 by the first Manu tour operator agencies, all of them located in Cusco and owned mostly by foreigners.

Tayakome broke links with CEDIA by sending a report to the PNM office and other indigenous organizations (COHAR-YIMA and FENAMAD) in which they stated that CEDIA was no longer welcome in their community (Rummenhoeller, 2000). Before the incident, CEDIA had had a good relationship with Tayakome.

The Matsigenka communities in PNM and the CEDIA leaders had worked together for more than a decade. CEDIA played a meaningful role in both Tayakome and Yomibato because they were responsible for the recognition of both as indigenous communities within the PNM. Nowadays, Yomibato still maintains a strong relationship with CEDIA because there are kinship ties between this NGO and one of the school teachers.

### *3.3.d Key vertical institutional linkages*

#### *i. facilitating/enabling the project*

Since the beginning of the project, the strongest vertical link has been between the Matsigenka enterprise and the governmental institution INRENA at the national and regional levels. The two Matsigenka communities initiated contact by asking for government support for their lodge project. According to the agreements signed between INRENA and APECO in 1997, INRENA together with the two Matsigenka indigenous communities are responsible for the EMM in PNM (FANPE-INRENA-GTZ, APECO, Comunidad de Tayakome, & Comunidad de Yomibato, 1998). However, there are gaps in the law regarding multi-community tourism enterprises as well as in the law governing indigenous people that live within protected areas. This has inhibited the INRENA- EMM relationship. In other words, many interviewees expressed that INRENA has put up barriers that have impeded the progress of the Matsigenka enterprise.

During the implementation of the EMM, a strong vertical linkage developed between INRENA and GTZ/FANPE. The latter was contacted by INRENA, which knew that this international NGO could provide funding through their FANPE project. In 1997, the project proposal, “Development of Matsigenka Lodge for Indigenous Communities in PNM – Stage I,” was prepared by an anthropologist hired by FANPE, who worked on it together with the two Matsigenka communities in the PNM (Rummenhoeller, personal communication, November 2004).

Because of the strong vertical linkages, the INRENA headquarters of PNM in Cusco follows the decisions made by the INRENA central office. According to the assistant manager of the EMM, the relationship with INRENA has not always been smooth, particularly with the headquarters office. Usually when the EMM makes a request or claim, or when it reports problems, it takes a very long time for them to receive a clear response from PNM officials. Therefore, on various occasions the assistant manager of the EMM stated that the strategy has been to direct the enterprise’s concerns to the INRENA central office.

#### *ii. as barriers/hindrances to the project*

“In Manu Park, the authorities are conservationists who have not put much emphasis on supporting indigenous communities within the park.”  
(Anthropologist researcher, personal communication, November, 2004)

According to the testimonies of the various participants involved in the Matsigenka lodge project, the attitude of INRENA officials has been one of ambivalence and uneven support of the EMM (see Box 4).

3.3.e *Impact of policy environment on the project*

- Since the beginning of the project, the Matsiguenka leaders have been asking to have a small-scale agriculture plot next to the lodge (*la chacra*) to grow their main food staple (cassava or manioc, *manihot esculenta*). By having an agriculture plot, staff in the lodge could continue to enjoy their traditional diet and depend less on a western diet (rice, pasta, canned food, etc.). The Matsiguenka assert that the benefits of having *la chacra* would be both cultural and financial; cultural because they would not have to change their diet and it could also be another attraction at the lodge; and it could provide a financial benefit because it would decrease their dependence on importing outside food and thus reduce expenses incurred to bring supply shipments to the lodge. The Matsiguenka vividly remember when the park guards destroyed the few cassava plants they had been cultivating near the lodge area. It has been more than five years since *la chacra* was requested by the Matsiguenka, but INRENA officials have yet to complete their evaluation of the request.
- In 2000 an “experimental agreement” was established among the eight tour agencies operating in PNM and INRENA. The tour agencies represented through the Ecotour-Manu ASSC signed a three-year contract with the PNM office for land concessions within PNM, in the *Quebrada Salvadorcillo* of the Reserved Zone. This contract has allowed them to build their own campsites near the Casa Matsiguenka lodge. In exchange for these concessions, the tour agencies agreed to pay the PNM office an annual fee equivalent to 7 UIT (*Unidad Impositiva Tributaria*; in 2000 each UIT was equivalent to \$ 840.00 US). The agreement was signed under the condition that *only* members of Ecotour-Manu ASSC (i.e., the eight tour agencies) would be allowed to operate within the PNM. At the 2001 General Meeting of indigenous organizations in the province of Madre de Dios, Tayakome and Yomibato leaders declared that such an agreement greatly affected EMM business<sup>15</sup>. The Matsiguenka communities within PNM felt that the INRENA-Ecotour-Manu ASSC agreement was a treacherous approach on the parts of the private and governmental institutions because: 1) Ecotour-Manu ASSC tour agencies were bringing tourists primarily to their own campsites and using the Matsiguenka lodge only as a last option; and 2) from 2000 to 2004 INRENA had no clear rules on whether the Matsiguenka lodge could work with independent tour operator agencies. This also reflected the significant decline in tourist visits to the Matsiguenka lodge since Ecotour-Manu ASSC tour agencies had opened their campsites in 2001 and 2002.

**Box 4. Mismanagement in PNM**

The assistant manager stated that the EMM has been affected by the mismanagement of PNM at the regional level. For instance, during two years (2000-2002), PNM park guards were allowing tour agencies to use the Pakitza Guard Post within PNM as a temporary camping site for local tour agency tourists. This situation directly affected the Matsiguenka lodge business and therefore the EMM presented a complaint to the INRENA central office to stop such activities (FANPE-INRENA-GTZ & APECO, 2000)

3.3.f *Change the project triggered in government legislation or policy*

Three new regulations approved by INRENA have helped the EMM:

<sup>15</sup> According to PNM officials, the agreement with Ecotour-Manu ASSC complied with the Natural Protected Areas Law, which stipulates that such areas should be used toward productive activities such as tourism. PNM authorities believed that the Matsiguenka enterprise was a unique lodge service that truly did not have competitors in PNM; in this sense, it should not have been affected by the agreement with Ecotour-Manu ASSC.

1) The EMM can have “experimental groups”, which is a category that refers to tourist groups directly organized by the EMM, sometimes in partnership with other tour agencies that are independent from the Ecotour-Manu ASSC. This regulation aims to facilitate the entrance of tourists in the EMM. Its purpose has been to help the Matsigenka lodge staff to have tourist visits as they receive training in tourism services; INRENA is flexible with “experimental groups” of tourists by facilitating their permission to enter the PNM.

2) Campsites in PNM have to be closed during the rainy season (a three-month period from December to March), whereas the Casa Matsigenka lodge is allowed to continue operating throughout the whole year. This law has aimed to force the Ecotour-Manu ASSC agencies to bring tourists to the EMM (Ohl, 2005). However, only a few tour agencies sell tour packages for the rainy season.

3) In 2005, INRENA has just approved a new regulation, i.e., *Reglamento de uso turístico*, which allows the EMM to work with other tour agencies besides the Ecotour-Manu ASSC agencies. This recently approved regulation aims to support the EMM. Five tour agencies, independent from Ecotour-Manu ASSC, are now bringing tourists to the EMM — 450 tourists visited from January to September 2005.

### 3.3.g *Unusual interactions or relationships among actors*

- There have been controversial interactions with/ reactions towards the EMM. One of the unusual interactions occurred in the third year of the project (1998) when CEDIA, the NGO that initiated the original idea of working together with the Matsigenka on an ecotourism lodge, accused INRENA of plagiarizing the Matsigenka lodge project. They sent this complaint to the ombudsman agency in Peru, and a trial began. The ombudsman agency was concerned that INRENA and the other institutions involved in the project were not being cautious enough in terms of the risks and negative effects that an ecotourism project might bring to the Matsigenka in the PNM. It was already unusual for INRENA and the Matsigenka community leaders to be working together; even more unusual was that they went to trial together and successfully overcame it. Perhaps due to the fact that the main protagonists of this entrepreneurial project belonged to a vulnerable ethnic minority group,<sup>16</sup> the ombudsman agency led CEDIA’s complaint into trial. This conflict paralyzed the EMM’s work for several weeks.
- An unusual interaction is between the EMM and Ecotour-Manu ASSC, which suggested to the EMM that they join the association. But the Matsigenka communities did not accept the proposal, nor did they agree to rent or sell their lodge to any of these private tour agencies. According to some interviewees, most Ecotour-Manu ASSC members have been fearful and jealous of the EMM because it is seen as a competitor that enjoys some “privileges” for operating in PNM, such as not having to pay an annual fee to INRENA.

## 3.4 Biodiversity conservation and environmental improvements

### 3.4.a *Conservation/improvement of target resources*

Only a few studies exist that deal with the effect of tourism activities on the flora and fauna in the PNM. One study monitored giant otters in the area during the 1990s, and showed that their population had remained stable (Ohl, 2005). Moreover, Enriquez and Morantes (2004) argue

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<sup>16</sup> The Matsigenka is a tribe that has had sporadic contact with western society and still strongly maintains its traditional subsistence livelihood and language.

that ecotourism activities are at an early stage in the PNM and that the environmental impacts on the Reserve Zone of the park are minimal. They argue that the EMM creates less of a negative impact than the other tour agencies' campsites (ibid). Also, because the Matsigenka lodge is located within the Reserve Zone of PNM – an area reserved exclusively for tourism and research purposes – nobody is allowed to hunt or cultivate there; only fishing is allowed as an exclusive right of the indigenous people. EMM staff members have gradually learned to respect the conservation laws in the Reserve Zone of PNM. Receiving INRENA support for their lodge has been an incentive for the Matsigenka to obey the conservation laws (Ohl, 2005).



Since the creation of the EMM, the relationship between the Matsigenka and INRENA officials has apparently become less tense (Ohl, 2005). In this sense, the EMM has benefited from the improvement in biodiversity conservation and INRENA socio-politics toward the indigenous communities in the PNM.

#### *3.4.b Changes in resource state*

One of the important environmental impacts of the project may be on birds like the Scarlet macaw (*Ara Macao*) and Cuvier's toucan (*Ramphastos cuvieri*), which indigenous craft producers have been using to decorate bows and arrows. Such consumption of feathers may affect the population of these bird species in the long term (Shepard, personal communication, February 2005). Nonetheless, no monitoring has been conducted to support this assumption.

In general, according to evaluations of the environmental impact of the Matsigenka lodge, the positive impacts of the construction and operation stages were higher than the negative impacts (SEGECO, 1997). Impact was low during the construction period because locally adapted techniques were used. The main elements of negative impact were produced through the transportation of tourists (ibid). Thus, water pollution of the Manu River has been a significant concern, as has been the management of garbage, part of which remains buried in PNM (Enriquez & Morante, 2004).

#### *3.4.c Was there any reduction on threats to biodiversity*

According to some interviewees, if the lodge enterprise did not exist to give economic benefits to the communities, the Matsigenka would probably be trying to commercialize wood from trees that fall naturally into the Manu River. This alternative, however, is highly conflictive; on the one hand, the population surrounding the PNM often uses that particular wood; and on the other hand, the heavy boat traffic required to transport wood would produce contamination and negatively affecting the Manu River.

### **3.5 Poverty reduction**

#### *3.5.a Indicators of poverty reduction*

The two indigenous communities in the PNM have gained different economic benefits from the Matsigenka lodge project (see Table 3). Through the ecotourism enterprise, the Matsigenka have created three new sources of income:

**i) Wage Labor as temporary staff of the EMM:** A study carried out by Ohl (2005) from 1999 to 2002 shows that the participation of the households varies between the communities. 80% of the households from Tayakome and 62% of the households from Yomibato have been contributing their labor to the ecotourism lodge enterprise – mostly young males from 20 to 30 years old. There is not any published study about the monetary income of Tayakome and Yomibato households prior to the EMM project. Ohl’s study shows that 95% of the Matsiguenka household income comes from the tourism lodge activities. It also shows that the average annual household income has increased in Tayakome from approximately less than US\$ 5.00 to US\$ 152.00, and from approximately US\$ 1.00 to US\$ 107.00 in Yomibato through working at the ecotourism lodge business (see Table 3).

Jobs are equally distributed between the two communities: 4 workers (3 staff and a manager on duty), which ensures the participation of two workers from each community. The staff has been rotating every two to four months during the first five years. During the past two years the rotation period has been every six months in order to reduce transportation expenses for the enterprise. Through a rotating system of staff, the communities ensure a broad participation of their households in the lodge enterprise.

**ii) Annual Community earning from the EMM:** The EMM has provided an average of US\$ 950.00 per year to Tayakome and Yomibato for their basic necessities. The distribution of the money designated for the two communities is primarily used for transportation, medicine and school supplies (Figure 6). The enterprise earnings have been equally distributed between the two communities (Ohl, 2005). 2004 was the first year in which earnings were invested in the renovation of the lodge and for that reason the enterprise could not spend money on the necessities of the communities.

**iii) Income generated from craft production:** Ohl’s research also observed that indigenous women from the two communities have obtained 40% of their total income from selling crafts (for example, necklaces and cotton purses). Of the total number of craft producers within the communities, 30% are elders (above 50 years old) who obtain 8% of their total earnings by selling crafts at the *Casa Matsiguenka* Lodge. The price of crafts has increased from US\$1.50 to US\$25.00 (ibid).

### *3.5.b Improvements in community well-being*

“Before the Matsiguenka lodge existed I had to go to Boca Manu to look for a job to be able to get batteries, a mosquito net and other things. Now we only need to go to Salvadorcillo [the Matsiguenka lodge] to work and earn some money.”  
(Tayakome community President, 2005)

The EMM has enabled the households of Tayakome and Yomibato to earn some monetary income without having to leave their territories. These Matsiguenka communities have very few options for developing other economic activities within PNM, which they have inhabited for centuries. It appears that their only possible alternative is the tourism business. Moreover, these indigenous people do not feel totally comfortable with going to bigger villages or urban areas to work for long periods because they have often experienced exploitation. Most of them have difficulties communicating because they do not speak Spanish (the official Peruvian language).

### 3.6 Community-based conservation

#### 3.6.a Mechanisms, dynamics, drivers

##### i) Analysis of catalytic elements that made the initiative work

On the one hand, the indigenous communities exerted strong pressure on INRENA officials to grant them an economic opportunity as compensation for not having the right to commercialize natural resources in the PNM. This restriction lasted for more than 20 years, from 1973 to 1996, and was caused by a top down approach to conservation based on a western framework. Thus, the indigenous people of PNM were completely marginalized from the conservation agenda in Peru. The first time that ecotourism was mentioned as a sustainable option for indigenous people within the PNM was during the Committee meetings for the PNM Operational Plan (1991-1993). This proposal was not taken further because PNM officials did not think that it was feasible for these indigenous people, unfamiliar with the market system, to manage a business (Rummenhoeller, 2000). Additionally, in Peru there were no examples of Amazonian indigenous communities managing their own lodges. On the other hand, FANPE had a budget for improving the management of protected areas in Peru. The Anthropological Policy of PNM aimed to work in conservation while addressing issues of concern to the indigenous communities within the area (Ohl, 2005). In 1996, with the new designation of INRENA as being responsible for the National Protected Areas, a commitment was made to support the Matsigenka communities' request for a lodge. The Matsigenka leaders were more than eager to organize their people so that the lodge project could become a reality.

##### ii) Decision-making process

As was indicated in conversations with some of the Matsigenka leaders, it has been a challenging process for them to familiarize themselves with and adjust to western concepts, such as enterprise and utilities, and to different activities such as working in accordance with a schedule. The indigenous owners of the EMM are people whose contact with western society has been sporadic and their notions about western life and habits are very limited. For this reason, making business decisions has been a slow process based on community consultation.

At the beginning of the lodge project, decisions were made through meetings between the Matsigenka communities and the supporting institutions (FANPE personnel, APECO and the INRENA headquarters and central office). In 1997, when the EMM was formally established, a Coordination Committee was formed with these supporting institutions (Rummenhoeller, 2000). This Committee was the key to the decision-making process during the first years of the EMM (FANPE-INRENA-GTZ, et al., 1998). As supporting NGOs left the Matsigenka project, important decisions have involved the Matsigenka managers and the assistant manager of the EMM. The assistant manager of the EMM makes decisions about the transmission of information about PNM administration and other issues (Ohl, 2005). It is important to emphasize that the opinions of the assistant manager of the EMM – now the only western person participating in the project – has a strong influence on the managers of the EMM, most likely because this person is a tourism professional, while the indigenous managers continue to lack knowledge about the tourism business and the market in general.

##### iii) Conflict-management mechanisms

“There was open communication and discussion between all of us about any project issue.”  
(Former chief of PNM, 2005)

Conflicts among members of the EMM are discussed by the two Matsigenka managers and the assistant manager of the EMM. Whenever a conflict remains unresolved, discussion goes to community meetings. INRENA acts as a mediator when conflicts occur between the EMM and other actors or stakeholders in PNM (see Box 5).

**Box 5. Unresolved conflict**

During the first years of the EMM project (1996-1997), FANPE and INRENA worked in constant coordination with the Matsigenka communities to develop the lodge project plan. One of the original main objectives of the EMM project was to transfer knowledge of managing an ecotourism lodge to the Matsigenka community members of PNM. The objective of the EMM was to be an ecotourism attraction in which the Matsigenka could offer their interpretation of nature while providing basic accommodation for tourists. Groups of tourists would be brought by private tour agencies that operate in PNM. Since 2000, after changes GTZ/FANPE leadership, FANPE has shifted the emphasis of the EMM emphasis towards turning the project into another tour operator and promoting the lodge as a Matsigenka cultural attraction. Various interviewees asserted that the reaction of Ecotour-Manu ASSC members was one of feeling betrayed by the EMM. Thereafter, the relationships between the EMM and most of the tour agencies operating in PNM have been highly conflictive, to the point that Ecotour-Manu ASSC members got concessions for their own campsite, and thereby minimize their use of the Matsigenka lodge.

*iv) Conflict resolution and enforcement*

A common element of conflicts between the EMM and INRENA has been the accusations that the Matsigenka lodge staff are hunting, gathering fruit or opening unauthorized trails around the lodge area. In some cases, when real evidence of the accusations are found, the outside participants in the Matsigenka enterprise (e.g., the assistant manager of the EMM) try to negotiate with INRENA officials to “justify” such incidents. In recent years of the project, the Matsigenka managers have been assuming complete responsibility and informing INRENA officials whenever accusations have been made.

*3.6.b Learning and Adaptive Management*

*i) How did previous observations lead to project formation and development?*

“Some indigenous people from the Matsigenka communities of PNM had worked with tourism agencies on many occasions. These people had an idea about what tourism was about.”  
(PNM chief, 2005)

At the beginning of the 1990s, CEDIA and a biologist from World Life Conservation International attempted to develop an ecotourism business with the people of Tayakome. They had several meetings in which the outsiders explained to the Matsigenka the benefits that ecotourism could bring to their community. There were plans to develop a partnership between the outsiders and the Matsigenka, and a few huts were built for lodging. The Matsigenka leaders gained awareness of tourism as the most feasible economic alternative for their community. In spite of the denial of INRENA support in this first attempt at ecotourism, the Matsigenka leaders insisted and persisted in seeking an opportunity to develop their own tourism lodge project.

*ii) How was experience incorporated into subsequent steps of the project?*

Only a couple of Matsigenka men had ever worked in the tourism industry, so in 1999, with the inauguration of the EMM lodge, Matsigenka staff and managers truly began to learn to

provide tourism services for the first time. The first tour groups were brought primarily by private tour agencies from the Ecotour-Manu ASSC. Thereafter tour group visits increased, giving the Matsigenka more opportunities to continue improving their tourism service<sup>17</sup>. Workshop sessions organized by APECO reinforced their on-the-ground training (Table 1). Furthermore, through a learning-by-doing process, the Matsigenka, particularly the managers, have learned to maintain their lodge, provide guiding services and improve their Spanish communication skills.

*iii) What was the role of experimentation, if any?*

“The Matsigenka were open and enthusiastic to learn and to work in ecotourism.”  
(FANPE consultant, 2005)

The whole EMM project was based on experimentation, i.e., it was a *pilot project*. Members of the supporting institutions (INRENA, GTZ and APECO) have expressed that the EMM has been a challenging experience. At some levels, they were aware of the difficulties and dilemmas involved in a project that would contribute to the articulation of the Matsigenka communities with the market economy. The cultural risk of supporting indigenous entrepreneurship was assumed by the network of institutions that were collaborating with the EMM (FANPE-INRENA-GTZ & Villar, 2000). Unfortunately, since 2004 most of these network of institutions are no longer involved with the EMM.

*iv) How monitoring (e.g., rare species) informs the project*

There has been constant monitoring of tourists' opinions about the services provided at the EMM. These have been periodically summarized and reported to INRENA and other participants in the EMM. The tourists' responses to Matsigenka services have provided clues for improving their services. For instance, some tourists mentioned that the entrance to the lodge (at the shore of the river) did not feel very safe, so the Matsigenka built ladders to make it more secure.

Despite the fact that a socio-cultural and an environmental monitoring plan had been developed, these plans have not been applied satisfactorily. However, a 2000 FANPE-INRENA/GTZ report, in response to a request made by the ombudsman agency, expressed that in the sociocultural realm, the Matsigenka project has not created any unacceptable negative effects on the Matsigenka communities (for more on monitoring see section 3.6.f.i)

*v) Barriers to CBC, and how the barriers were overcome*

The most significant barriers have been in marketing with the aim of bringing enough tourist groups to guarantee revenues to the communities. To ensure more visits to the lodge, FANPE negotiated with INRENA to allow the EMM to have “experimental groups” (see 3.3.f.). In this way, the Matsigenka enterprise will depend less on the private tour agencies.

*vi) Combining knowledge systems to solve problems*

During the five first years of the EMM, problems were resolved in meetings between the community leaders and the supporting institutions. Problems were exposed by the participants who, in accordance with their roles (as manager, consultant, facilitator or INRENA officers), assumed the responsibility of doing follow-up paper work to solve the problem. While the

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<sup>17</sup> In 2002, due to the decrease of tourists by 50% (see Figure 5), FANPE assisted the EMM in marketing and in retrieving tourists to visit the Matsigenka lodge.

supporting NGOs were active, the tendency was for FANPE personnel to advocate on behalf of the EMM in discussions with INRENA. Since 2003, the Matsigenka managers and the assistant manager have had to deal with solving problems on their own.

*vii) Was there adaptive management (learning-by-doing) with the organization structure and/or with ecosystem management?*

The operation and management of the lodge have been real learning-by-doing experiences in how to provide good service and run an efficient enterprise. For example, in the beginning the idea was for tourists to experience the Matsigenka lifestyle, which meant sleeping on the ground. Therefore the lodge beds were on the ground. But after receiving complaints from tour agencies (who did not like seeing their clients sleeping on the ground), the Matsigenka decided to modify their beds so that they would be raised above the ground. Through this example we can see that they put an effort into finding a middle ground between their own and a western standard of comfort.

*3.6.c Community benefits from biodiversity conservation and environment improvements*

*i) What direct benefits were observed*

“If the lodge didn’t exist, there would not be a way for us to buy clothes and other basic stuff. Now, we don’t need to bother Fitzcarrald or the Mayor of Boca Manur about our problems and necessities.”  
(Group interview to Tayakome leaders, 2005)

Having an enterprise and owning a lodge is something for the Matsigenka to be proud of, and now other ethnic groups from the Amazon look at them with more respect. For this reason, the EMM is considered a successful project in social terms. Also, with the profit made from the lodge enterprise, the communities have satisfied some essentials/necessities, such as transportation, school supplies, and improved medical services (Figure 6; also see section 3.5).

*ii) What indirect benefits were observed*

In 2002 the EMM was the only one of its kind and it was invited to the World Summit of Ecotourism in Quebec. In 2003, it was given an award by the President of the Peruvian Republic and the Ministry of Agriculture for being an honorable example of organization and successful rural development.

*3.6.d Livelihood strategies, coping and adapting*

*i) How did involvement in the project affect other livelihood pursuits, negatively or positively?*

According to Ohl’s study (2004a), the impact of the EMM on the communities’ traditional economic system has not been significant. One main reason for this is that the community members do not generally invest much time in working for the EMM.

In the interviews I conducted, the Matsigenka leaders clearly expressed their intentions to continue working on the EMM. They are willing to adapt to the work requirements at the lodge, which means temporarily moving out to the lodge: 6 months for staff and 2 years for the managers. They have had to adapt to a new routine (e.g., working under a rigid schedule) and new living conditions (e.g., eating western products because they cannot cultivate or hunt).

The most affected households have been those of the managers; the manager moves to the lodge and sometimes his family comes, too. Besides disrupting communication with the community, this move implies temporarily abandoning the family land plots. One of the worst results has been changing their diet to western food, because this is mostly what is available within the lodge. The men working as staff also have had to stop providing meat to their families for the period that they are away from the community. Positive impacts have come from the profit made through working at the lodge. The earnings have allowed their families to acquire supplies that they could not produce on their own.

*ii) How did the project affect the ability of households and the community to adapt to changes (e.g., markets)?*

Overall, the project has helped the Matsigenka to adapt to changes by giving them a chance to earn some monetary income without having to completely abandon their territories and traditional economic activities. The EMM has allowed these indigenous communities to articulate with the market economy in a gradual and more advantageous way than they had previously experienced (for more explanation see section 3.5.b and section 3.6.f.i).

*3.6.e Resilience of communities, livelihoods and management systems*

*i) Did the project add options?*

“Some NGOs thought that we would not be able to manage a lodge because we speak little Spanish...but we want to do it ourselves...if it fails we’ll know that we can not do it. But Casa Matsigenka remains open, so that must mean that we can do it and now we do not need to leave our land or our children.”

(Leader of the EMM from Tayakome, 2005)

The EMM is a new source of income for the indigenous community members. The EMM aims for the Matsigenka to be able to manage their own lodge enterprise. The managers in particular have been slowly learning and gaining confidence to assume more responsibility, however, they are aware that it is a long process and they need more training and assistance. Some members of the younger generation are looking to the enterprise as a future source of employment.

*ii) Did the project create learning opportunities?*

Since the first years of the EMM there have been several workshop sessions to train the indigenous people, particularly the managers. Workshop objectives have varied along with the progress of the EMM: 1) to prepare some Matsigenka to work with the non-Matsigenka (i.e., tourists and the tour agency staff); 2) to improve their reading and writing in Spanish, and their mathematic skills; 3) to understand some basic concepts of the monetary system, such as enterprise, utility, investment, banks, bank accounts, job scheduling and management, etc. Through these workshops, the non-indigenous participants have also learned about the levels of expectation expressed by the Matsigenka as well as some of their important cultural concepts (Rummenhoeller, 2000).

*iii) Did the project create self-organization opportunities?*

One of the meaningful effects of the EMM has been strengthened community organization. None of the foreign institutions has put as much energy into this project as the indigenous communities. In this sense the EMM has been a stimulus for the Matsigenka to

strengthen their community organization. Otherwise the EMM would not have survived through various crises. Both communities quietly overcame their own disparities and tensions to organize themselves in order to work together for the EMM (Shepard, et al., in press).

3.6.f *Transferability of the lessons from this EI case*

i) *Which lessons were likely transferable? Why?*

Some of the following lessons might be transferable, particularly to other community-based ecotourism projects under similar socio-economic and cultural conditions:

- **Inclusion of traditional knowledge plays a meaningful role in the Matsigenka's identity and pride in the EMM**

“...of course there has to be storytelling...we can show plants but Matsigenkas know not only plants, we know how the Earth was in the past, where monkeys come from, where all animals come from, this has to be told...if not, this is not an indigenous lodge.”  
(Leader of the EMM from Yomibato, 1998)

The inclusion of traditional knowledge in the EMM is an example for other development projects. The strong identity and sense of pride in the lodge enterprise ownership is based on the fact that it was created by the will of the Matsigenka people; more importantly, it reflects their Matsigenka culture through various elements: architecture, crafts, interpretation of nature and traditional use of plants, and sometimes their storytelling. However, discussions have been held since the planning process of the EMM about not turning Matsigenka culture and people into “tourist attractions” and “objects”, which is a constant risk in any indigenous tourism enterprise. For instance, the original proposal aimed to build a tourist-native relationship that would prevent natives from turning into servants of the tourists. Therefore, the original plan proposed that the tour agencies take charge of most of the tourism services (such as transportation and food supply), while the indigenous lodge would only provide basic accommodations and guided tours around the lodge area. In 2004 this feature continues and the EMM was looking into hosting workshops on ethno-ecology for international students, with the participation of Matsigenkas and some researchers in the field.

- **Capacity building is a very long process**

“If we would stay on our own, this [project] wouldn't have worked...we were not ready to assume full responsibility of the lodge...we still don't know... [we are] like children who have to be fed first and someday will manage their plant plot by themselves...”  
(Leader of the EMM from Yomibato, 1998)

“The young generations are the ideal candidates for learning about Matsigenka lodge management because they can stay in the lodge and don't have to worry about taking care of their plant plot and children.”  
(Leader of the EMM from Tayakome, 2005)

The Matsigenka people, in particular the leaders, have expressed that through their involvement in the EMM they have been acquiring great experience in managing the lodge, as well as in providing appropriate quality service to their visitors. Although formal training was not completed, the Matsigenka staff felt that they had improved the quality of their work over the six years of operating the lodge; most of the improvement has been accomplished through a

learning-by-doing process. Because the lodge staff is organized through a rotating system, every new shift usually involves the training of new, inexperienced staff. So, the EMM has displayed a very slow learning process of training and retraining, which has taken into account that the Matsigenka are not familiar with western concepts and languages (Spanish and English). Therefore, the Matsigenka are constantly demanding ongoing and specialized training sessions by qualified people in ecotourism services. The long capacity-building process may be a transferable lesson for ecotourism projects that involve different cultural groups and non-exclusive participation in trainings.

Also, the Matsigenka leaders have realized that the best candidates for the jobs offered at their lodge come from the younger generation, primarily because they do not have big families to take care of and can easily move on a temporary basis to work at the lodge rather than permanently migrating outside of their communities.

- **Craft production has been successful as it has provided ongoing direct economic benefits to the producers residing in the Matsigenka communities in PNM**



Matsigenka woman making cotton thread

A great success of the EMM has been in relation to the production of crafts, which are mostly made by the community women in their households. Through a learning-by-doing process, women have learned to improve craft quality and production, and these crafts are then sold at the lodge. The whole price paid by tourists goes directly to the craft producer. Apparently, the profit generated by craft production has been steady and has become a main source of income for women and elders, who otherwise would not have other options to obtain monetary income without disturbing their traditional livelihoods. This type of indirect participation through craft production may be transferable to other tourism projects with the aim of increasing community participation.

- **The EMM needs clear cross-cultural communication between the indigenous people and other participants**

Another lesson of the EMM that can be transferred to other development projects concerns the need to hire consultants/facilitators with extensive experience and familiarity with the participating indigenous communities. Several interviewees mentioned that the progress of the EMM could have been improved if there had been better cross-cultural communication between the various participants of the project; it would have helped if outside participants had better knowledge of the Matsigenka communities' characteristics and livelihood; for instance, knowledge of the traditional annual calendar in order to improve coordination in planning the project. Some interviewees mentioned that the period required to build the lodge infrastructure (1997-1999) was longer than originally planned because the project agenda was prepared without considering the indigenous people's own agenda. Furthermore, the indigenous people's progress in training could have been faster if trainers had spoken the native language.

Another lesson related to communication is that the outside participants in the EMM project found it difficult to coordinate between the various institutions. A fulltime general coordinator was needed who could facilitate communication between the various people involved in the project, supervise project activities, and solve conflicts.

- **More sales promotion/marketing should have been implemented before opening the EMM lodge**

“The success of a tourism enterprise depends on knowing the features of the product to be sold and then doing a market study to locate demand. In so doing, market networking can begin.”

(Rainforest Expeditions ecotourism agency, managers, 2005)

Marketing is an essential component in any entrepreneurial project. However in the EMM this has been a weak element according to some interviewees. It appears that marketing components have not been a priority from the beginning of the planning process of this community-based ecotourism project. The interviewees mentioned that there has not been a clear vision about the Matsigenka lodge as a product to be offered in the market. For instance, is the EMM an ecotourism or ethno-tourism enterprise? (Both features could be complementary).

Marketing of the EMM has mostly depended on the private tour agencies that work in PNM. Thus, a lesson learned by some project participants is that when one is working on an ecotourism development project, marketing components should be planned and developed from the very beginning. To make such tasks less challenging, it is essential that participants (such as facilitators and/or consultants) have experience in the tourism market and in marketing; in this way they can provide appropriate assistance to the indigenous people to deal successfully with the market dynamic (e.g., how to negotiate with other stakeholders in the tourism industry such as tour agencies). The lessons related to marketing in the EMM can help other indigenous entrepreneurs to learn from their mistakes.

- **Developing a strategic business alliance with tour agencies should have been a priority in the EMM’s agenda: “A lizard among the crocodiles”**

Since the EMM put emphasis on acquiring business partners with tour agencies besides the ones from the Ecotour-Manu ASSC, some of the tour agencies from this association shifted their attitude from that of potential allies to persistent and sometimes hostile competitors of the Matsigenka enterprise. According to some participants in the EMM, Ecotour-Manu ASSC leadership seems to see the EMM as a potential threat to their tourism business domain in Manu, so they often bring tourists to the Matsigenka lodge only as a last resort. Moreover, Ecotour-Manu ASSC successfully reached an exclusive agreement with the INRENA headquarters office in Manu to allow only members of the Ecotour-Manu ASSC to operate in PNM in exchange for regular revenues to INRENA. Such a monopoly led the EMM to an economic crisis (see section 3.3.e for more explanation). Therefore, the indigenous enterprise put pressure on INRENA to allow other tour agencies to operate in PNM, but only through the EMM. After several years, this petition was finally approved in 2005.

A main lesson for PNM officials, as a governmental institution and the party responsible for the EMM, has been to act more thoroughly when arranging agreements with the private sector and in ways that do not favor personal interests but instead increase trust between the various stakeholders in protected areas. A main lesson for the EMM is that they need tourism business partners who can take into consideration the unique features of the EMM. The transferability of this lesson is relevant because the private sector, directly or indirectly, plays a role in this type of project. For this type of project, there is a need to look for business partners within the “Fair Trade” market sector.

- **The EMM is about experimenting with a potential model of conservation in PA that involves indigenous groups. It demands long term institutional commitment**

According to some former government authorities in charge of managing Protected Areas (PA) in Peru, the implementation of the EMM and the lodge has been an opportunity to gain experience in developing a management model for Protected Areas in the Amazon that involves the local indigenous groups. The EMM is a pilot project that is providing an opportunity for governmental and non-governmental officials to realize that this type of project requires a long-term institutional commitment. In doing so, the project has a better chance to be appropriately planned, implemented, and monitored, all of which are essential conditions for successful pilot projects. However, at the present time the Peruvian authorities work very much in a western framework, and thus the appropriate time for establishing a community-based conservation approach that would empower indigenous communities in PA is at the very beginning.

- **Monitoring would be relevant if it were applied based on the indigenous people's criteria; it should be a simple monitoring system**

At the beginning of the EMM, monitoring studies were initiated. During the project planning, establishment and the lodge-building infrastructure stages, sociocultural monitoring activities were difficult to pursue. One of the main lessons of this first monitoring experience was that monitoring should be a specific task carried out by experienced consultants or a graduate student who can focus on this task for a period of several years<sup>18</sup>. Further monitoring was conducted by a team of consultants who developed a very sophisticated "Sociocultural and Environmental Monitoring System of the Matsigenka lodge, Manu National Park" in 2000, with the valuable guidance of experienced researchers at PNM. However, according to some interviewees, this monitoring system could only be applied by academics. A relevant lesson of the monitoring experience was that it would be more valuable if the indigenous people could apply their own perceptions to the monitoring system because in this way they would be enabled to identify main concerns and the impact of the project on their communities. Therefore, some simplification of the monitoring system was applied, and some short training was offered to the indigenous people. However, for the indigenous people to continue the monitoring task, further training is essential. The monitoring lessons and the system developed for the EMM are relevant and transferable, especially for community-based tourism projects, because they provide indicators and methodology that could be adaptable and applicable in different contexts.

- **A project such as EMM can strengthen community organization, leadership and identity**

A remarkable lesson is that the EMM was a great motivation for community organization. Social organization in communities is fairly new among the Matsigenka (see section 2.2). Therefore, this can be considered a successful experience, and it is particularly the case in, relation to the social aspect. Although managing an enterprise is not an activity that belongs to this indigenous people's traditional economic system, the Matsigenka communities have successfully organized themselves to create and maintain their eco-ethno-tourism lodge enterprise in the market, while also continuing to practice their traditional livelihood system. Moreover, their sense of pride and self-esteem in their Matsigenka culture has increased, as they have become increasingly respected by the other ethnic groups in the Amazon, who used to underestimate the Matsigenka culture.

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<sup>18</sup> The economic monitoring of the EMM has been developed into a PhD dissertation by a German student hired by the GTZ, who has provided quantitative and qualitative information about the economic impact of the EMM on the Matsigenka traditional system (see: Ohl, Julia, 2004).

The Matsigenka leaders have persisted in being the main protagonists of their multi-community enterprise rather than allow other agencies to take on the management responsibilities. Although, the Matsigenka leaders are open to exploring different options and business partnerships that could allow them to improve the marketing and economic revenues for their enterprise, they would prefer to make mistakes and work as their own bosses and staff rather than allow strangers (for instance, experienced ecotourism agencies) to take control of their multi-community enterprise.

- **Partnerships between two communities may encounter less internal conflicts when they belong to the same ethnic group**

Pre-existing differences and tensions among the two Matsigenka communities in PNM were put aside to be able to work together for the development of the Matsigenka ecotourism lodge project. The Matsigenka leaders have a clear understanding of the economic potential of the ecotourism lodge for their communities, particularly for future generations. They are hopeful that their children will be able to gain more benefit by learning how to manage their lodge enterprise. Therefore, unorganized but united, these two Matsigenka communities have been persistent in creating dialogue and negotiating with park authorities and NGOs to gain support for their EMM. This lesson may be transferable to other tourism projects with indigenous people in which ethnicity often plays an important role<sup>19</sup>.

ii) *Which lessons were not transferable? Why?*

- **Community organization in *faena* was a very effective organization system for the EMM**

The *faena* is an organization system that comes from the highland mountain communities and was quite recently adopted by communities in the Amazon during the 1960s and 1970s. This system was very effective for the project, specifically for building the Matsigenka lodge (see section 3.2.c.i.a.). The communities continue to use the *faena* system for other community works.

- **Gaps in the Peruvian legal system have created obstacles for management and progress of the EMM**

Another lesson that may be transferable, particularly to pilot projects, is that they may be dealing with gaps in the legal system, which could create obstacles for the management of the project. For instance, Rummenhoeller (1998) mentioned that the Peruvian regulations (i.e., *DS 045-93-AG*) in 1990s are not clear about the constitution of multi-community enterprises that provide tourism services. Additionally, there have been mistakes in the EMM bylaws regarding the level of intervention of INRENA officials in the decision-making process of the multi-community enterprise<sup>20</sup>.

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<sup>19</sup> I visited the Equator Initiative finalist project, the Ese'jeja Native Community of Infierno, which is a partnership between the Rain Forest Expedition and the Infierno Native Community, Madre de Dios, Peru. One of the main indigenous leaders of this project mentioned that despite the economic success that their project has achieved, there are internal conflicts that can not be overcome yet. According to the interviewed leaders, one main element of conflict (which involves mistrust and differences of interest) has been determined by the ethnic differences among the members of their community.

<sup>20</sup> Rummenhoeller (1998) also emphasized that the INRENA office has had no intention to interfere in the decision making process of the multi-community enterprise.

On the one hand, various interviewees expressed that despite the formal responsibility of INRENA for the EMM, the institution has provided insufficient support to this indigenous pilot project. For instance, INRENA could have implemented and enforced rules for the local tour agencies collaborating with the EMM by setting a percentage of tourists for each year. On the other hand, former officials of the INRENA headquarters office that were interviewed mentioned that the local governmental institutions have not had enough power to reach agreements or enforce bylaws/rules effectively within the private sector in Manu<sup>21</sup>.

### 3.6.g *Recommendations to improve the EMM*

The following recommendations emerged from interviews and discussions during the fieldwork<sup>22</sup>; a few are reformulations of ideas proposed by other researchers:

#### i. **To international development institutions that support the EMM indigenous enterprise project**

- **Facilitate funding and its management;** there is a need for middle and long-term financial support and institutional commitment to the EMM. Funding should be delivered for general planning; capacity building and strengthening leadership for the indigenous people<sup>23</sup>; updating and undertaking the sociocultural and environmental monitoring system of the EMM; and also the creation of an evaluation system.
- **Enhance local capacity and leadership by providing ongoing access to education and training programs to community members,** particularly to leaders such as the EMM indigenous managers. Through interviews the Matsigenka leaders expressed that they needed more training and language education in both Spanish and English. Training will be most effective if the teaching method is through “learning by doing” and delivered in the indigenous people’s native language. In doing so, the process of a truly Matsigenka-managed lodge can become a reality. Also, it is important to evaluate how much time in the year the community members are willing to spend working at the lodge<sup>24</sup>. There appears to be a strong interest among some youth members in the communities to receive training to work in the Casa Matsigenka lodge.
- **Reinforce community organization and improve communication between the EMM and the communities;** for example, assistance to create an advisory committee or to reactivate the coordination committee for consultation on EMM issues and problems.

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<sup>21</sup> Currently, there is a trial against INRENA due to accusations from some members of Ecotour-Manu ASSC; the main reason appears to be mismanagement of the park.

<sup>22</sup> Other researchers who have done research on the EMM project have produced similar recommendations (see Ohl, 2005; Shepard 1998).

<sup>23</sup> I wish to acknowledge Dr. Glen Shepard of the Instituto Nacional de Pesquisas da Amazônia, Brazil, for providing the main idea for this recommendation.

<sup>24</sup> I wish to acknowledge that this recommendation emerged through personal conversations with Dr. Julia Ohl of the University of East Anglia, UK.

- **Facilitate support for conducting market studies**, prepare entrepreneurial business and marketing plans, and assist in their implementation and development. For instance, seek the assistance of professionals to develop tourism marketing plans for the EMM.
- **Assist the EMM in creating and strengthening partnerships** with local, regional and international tour agencies that truly exercise both fair trade and ecotourism principles.
- **Support and facilitate the exchange of ideas and experiences between similar projects across regions and countries in Latin America**<sup>23</sup> (horizontal learning). This can be accomplished through visits to indigenous and non-indigenous ecotourism lodge enterprises; participation in national and international forums, festivals and other events and the publication of handbooks or manuals about their experiences. The EMM has been positively influenced by other indigenous tourism experiences within Peru and from other countries. A highlight of the exchange experience is to strengthen Matsiguenka confidence in their capability to carry out the EMM project. Nonetheless, more exchanges are required to expand, improve and strengthen the Matsiguenka enterprise project.

ii. **To INRENA, Department of Protected Areas**

- **Develop a long-term institutional commitment** towards a co-management partnership policy that accounts for the indigenous inhabitants in PNM through a transparent and collaborative management approach.
- **INRENA should be flexible but consistent with its regulations** in order to facilitate the continued success of the EMM project.
- **There is an urgent need for clear tourism market regulations in PNM** that address multi-community enterprises, particularly of indigenous inhabitants in PNM. Through an ongoing and continuous consultation, such a legislation-building process should account for pilot projects such as the EMM community-based ecotourism enterprise. The different scopes of responsibility of the INRENA central office and the INRENA headquarters office upon the EMM should be clearly stated.
- **Promote ongoing and continuous emphasis on communication** among the INRENA headquarters office personnel, the central office, and the indigenous communities in PNM. For instance, there should be a designated professional committee to work closely with inhabitants in PNM to bridge communication gaps between them and INRENA officials.
- **Educate all stakeholders with regard to policy and responsibilities**; INRENA has recently updated the Anthropological policy for the indigenous population in PNM. However, it appears that this policy has not been adhered to. In various interviews with different stakeholders of PNM, there was little clear understanding about INRENA's anthropological policy. Also, the indigenous people in PNM appear to not have a clear idea about what their rights and/or duties are. It is recommended that INRENA provide

training workshops for park personnel, regional and local authorities, tourism personnel and other stakeholders on areas such as PA policy; PNM indigenous population, culture, rights and duties; environmental conservation in PA; and they should emphasize the need to work together in a concerted effort. Likewise, similar workshops should be provided to the indigenous population in PNM.

- **Provide support to small satellite projects that would supplement the ecotourism lodge project<sup>25</sup>** and broaden the participation of the community members. For example, educational activities that include the community school for the creation of a Matsigenka interpretative room, an ethno-botany garden and other projects.

iii. **To members of the EMM**

- **Seek support for the creation of an advisory committee** for consultation on EMM issues and to assist them in evaluating the progress of their enterprise.
- **Seek support for the creation and implementation of a marketing plan**, including the development and maintenance of a website about the Casa Matsigenka Lodge project.
- **Seek support for ongoing training programs for the Matsigenka people** to work at and manage the lodge. The communities should be encouraged to train and hire youth and young adults. A particular set of training programs should be delivered to improve craft production within the communities.
- **Seek support to update and undertake the sociocultural, environmental and economic monitoring system of the EMM** and to complement it with a health monitoring system.
- **Protect the Matsigenka people's health;** the Matsigenka workers of the lodge are exposed to illnesses that their immune systems are not prepared for. For instance, the Matsigenka are highly susceptible to influenza, which can be devastating and often cause death, and it can be spread to the other community members. Therefore, it is recommended that medical care services be provided to lodge workers, and a complete and updated medical kit should be accessible to the Matsigenkas working at the lodge. The regular visit of MINSA<sup>26</sup> staff to the lodge would be highly beneficial.

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<sup>25</sup> I wish to acknowledge that Biol. Chris Kirkby provided the main idea for this recommendation.

<sup>26</sup> Ministry of Health

## Tables and Figures

**Table 1. Stages of the enterprise project, objectives, key leaders and organizations, and workshops in the EMM, Peru. See List of Acronyms & Abbreviations.**

Year	Stage of the EMM	Objectives	Key local leaders	Key outside organizations & people	Workshops for Matsigenka Communities
1996-1997	Planning and establishment of the EMM	<ul style="list-style-type: none"> <li>To set up the lodge</li> <li>To develop the services management of the lodge</li> </ul>	<ol style="list-style-type: none"> <li>Community leaders (males)</li> <li>Two managers (one per community) (males)</li> </ol>	<ol style="list-style-type: none"> <li>INRENA</li> <li>PNM (INRENA headquarters office)</li> <li>GTZ-FANPE</li> <li>Anthropologist &amp; Architect</li> </ol>	<ul style="list-style-type: none"> <li>Several meetings to define the objective of the project and of the multi-community enterprise</li> </ul>
1997-1998	Construction of Casa Matsigenka lodge	<ul style="list-style-type: none"> <li>To build the lodge infrastructure</li> </ul>	<ol style="list-style-type: none"> <li>Community leaders</li> <li>Two managers</li> </ol>	<ol style="list-style-type: none"> <li>INRENA</li> <li>PNM (INRENA headquarters office)</li> <li>GTZ-FANPE</li> <li>APECO</li> </ol>	<ul style="list-style-type: none"> <li>Training Plan design</li> <li>Motivational workshop</li> <li>Motive for and use of intercultural bilingual handbooks</li> </ul>
1999	Adaptation and testing	<ul style="list-style-type: none"> <li>Adaptation of community members to lodge work</li> <li>Elaboration of sociocultural &amp; environmental monitoring plan</li> </ul>	Two managers	<ol style="list-style-type: none"> <li>INRENA</li> <li>PNM (INRENA headquarters office)</li> <li>GTZ-FANPE</li> <li>APECO</li> </ol>	<ul style="list-style-type: none"> <li>Training</li> <li>Evaluation of training</li> <li>Giant otters management</li> </ul>
2000	Learning tourism services	<ul style="list-style-type: none"> <li>Provide tools to help management of organization and planning about the EMM</li> <li>Strengthen Matsigenka self-esteem and cultural identity</li> <li>Implement sociocultural &amp; environmental monitoring plan</li> </ul>	Two managers	<ol style="list-style-type: none"> <li>GTZ-FANPE</li> <li>APECO</li> </ol>	<ul style="list-style-type: none"> <li>First training for lodge ownership management</li> <li>2<sup>nd</sup> sociocultural monitoring meeting</li> <li>Training</li> </ul>

2001-2002	Improvement of tourism management	<ul style="list-style-type: none"> <li>• Improvement in tourism service</li> <li>• Learning enterprise management</li> <li>• Practicing maintenance of lodge infrastructure</li> </ul>	Two managers	<ol style="list-style-type: none"> <li>1. GTZ-FANPE</li> <li>2. APECO</li> <li>3. Assistant manager of the EMM (female)</li> </ol>	<ul style="list-style-type: none"> <li>• Sociocultural &amp; environmental workshop</li> <li>• Training</li> </ul>
2003-2004	Experimentation & Self-learning	<ul style="list-style-type: none"> <li>• Consolidate active participation of Matsiguenka in self-management and success of project</li> <li>• Training to develop their own enterprise</li> </ul>	Two managers	Assistant manager of the EMM (female)	<ul style="list-style-type: none"> <li>• First tour groups brought by tour agencies out of Ecotour-Manu ASSC.</li> <li>• More “experimental groups” of tourists visit Matsiguenka lodge</li> </ul>

Table adapted from the *Empresa Multicomunal Matsiguenka S.R.L* (2004).

**Table 2. Cross-scale representation of stakeholders in the EMM, Peru.**

Stakeholders	Local/Community	District	Province	National	International
EMM	X				
Matsigenka communities: Tayakome & Yomibato	X				
PNM*		X			
Ecotour-Manu ASSC			X		
INRENA*				X	
GTZ*					X
FANPE*				X	
APECO*				X	
CEDIA				X	
CCBS (biological research center)					X
FENAMAD			X		
COHAR-YIMA	X				
COMARU	X				
<i>Defensoría del Pueblo</i> (ombudsman agency in Peru)				X	
Tourists					X

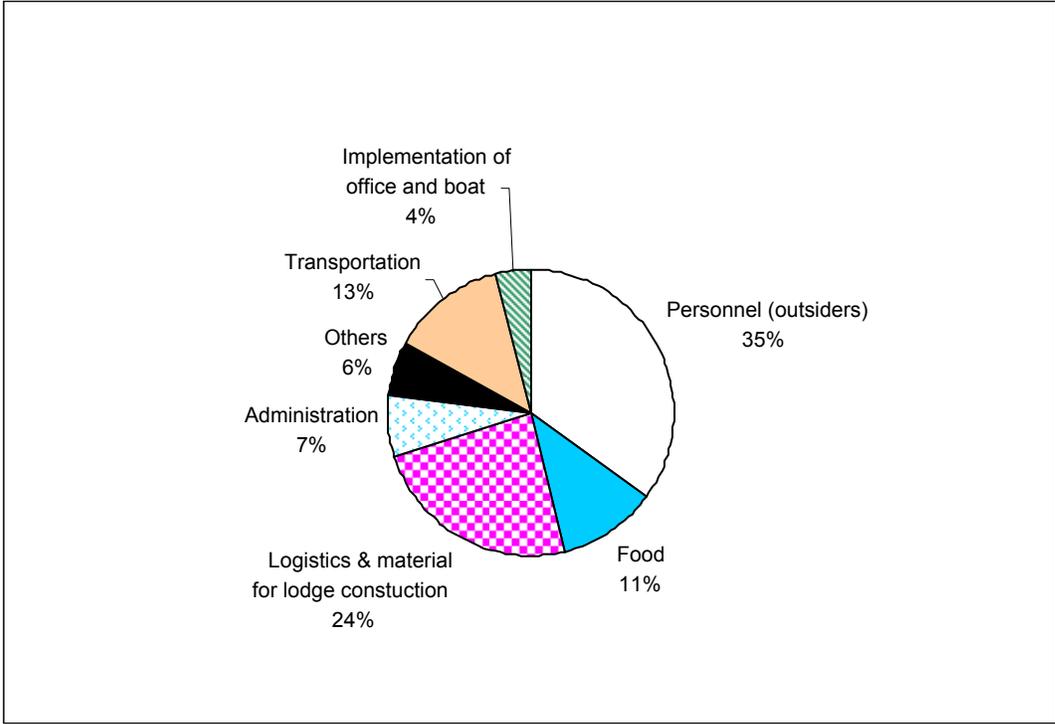
X	Level at which institution is based
	Level at which institution is active in relation to the EMM
	Level at which institution is not active in relation to the EMM

\* Institutions that have supported the implementation of the EMM.

**Table 3. Annual Income for Tayakome and Yomibato earned through the EMM**

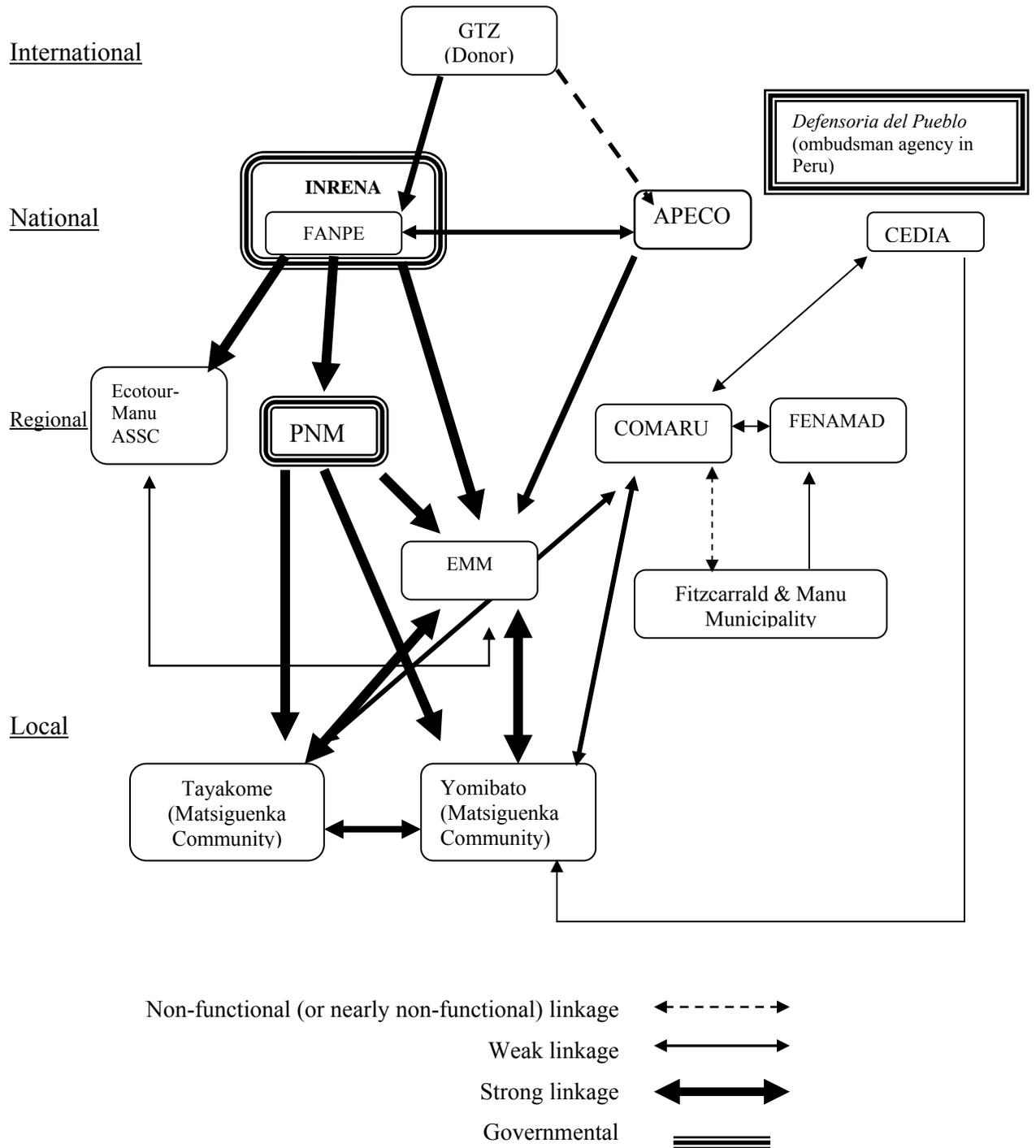
Annual Income	Tayakome US \$	Yomibato US \$
• Wage labor to staff and managers of Matsigenka lodge	1,100.00	1,100.00
• Average Community earnings from Matsigenka lodge	900.00	900.00
• Earnings from selling crafts at Matsigenka lodge	1,200.00	1,200.00
Total	3,200.00	3,200.00
<b>Increased Income per household:</b> Tayakome (21 households) Yomibato (30 households)	<b>152.00</b>	<b>107.00</b>

Source: Adapted from Ohl (2005)

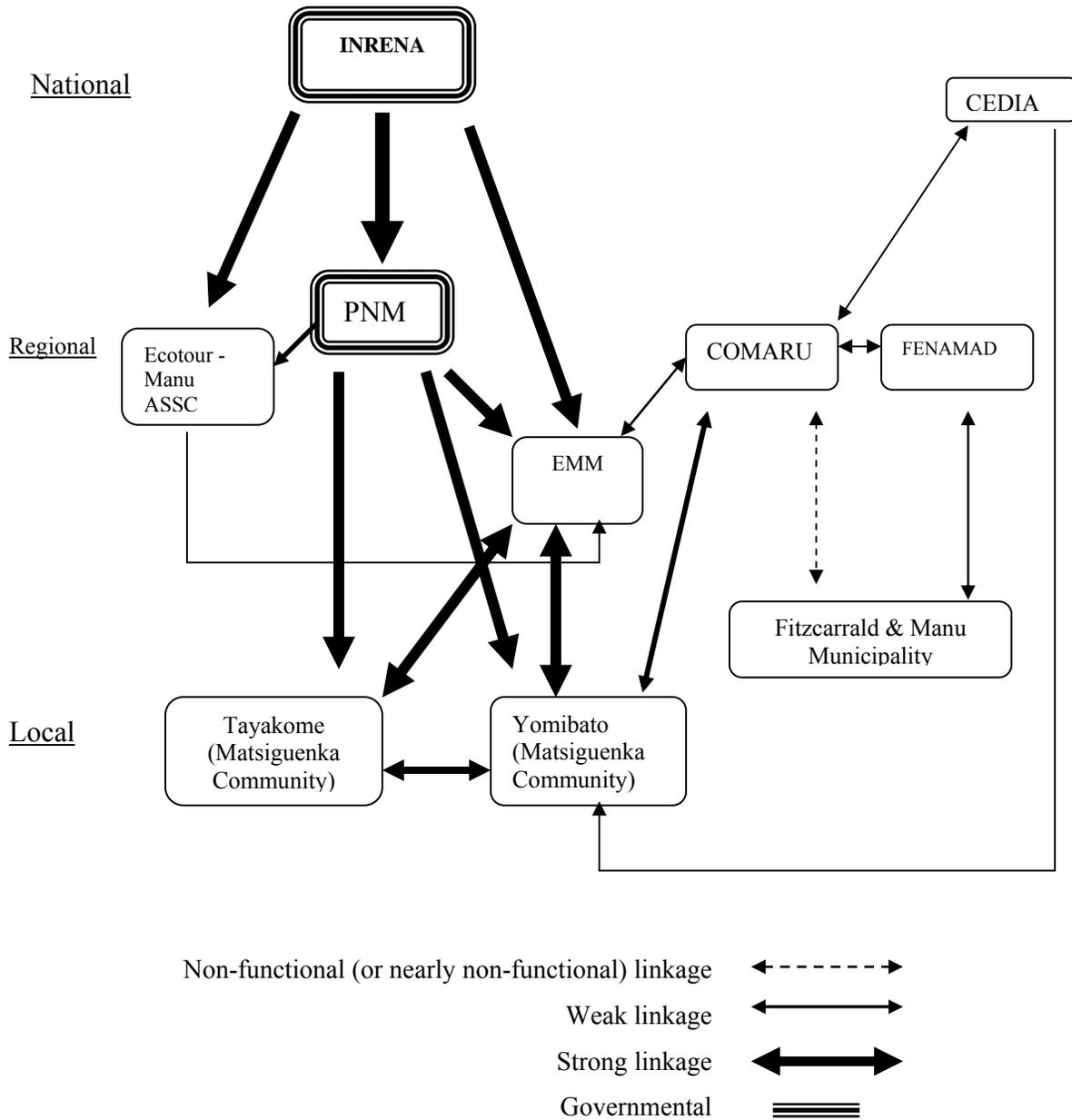


**Figure 2 . Percentage distribution of funding donated by GTZ to the EMM (1997-2003)**

Source: Adapted from Ohi (2004)



**Figure 3. Cross-scale interactions of stakeholders in the early years of the EMM (1996 – 2003). See List of Acronyms & Abbreviations.**



**Figure 4. Cross-scale interactions of stakeholders in the EMM in 2004 - 2005. See List of Acronyms & Abbreviations.**

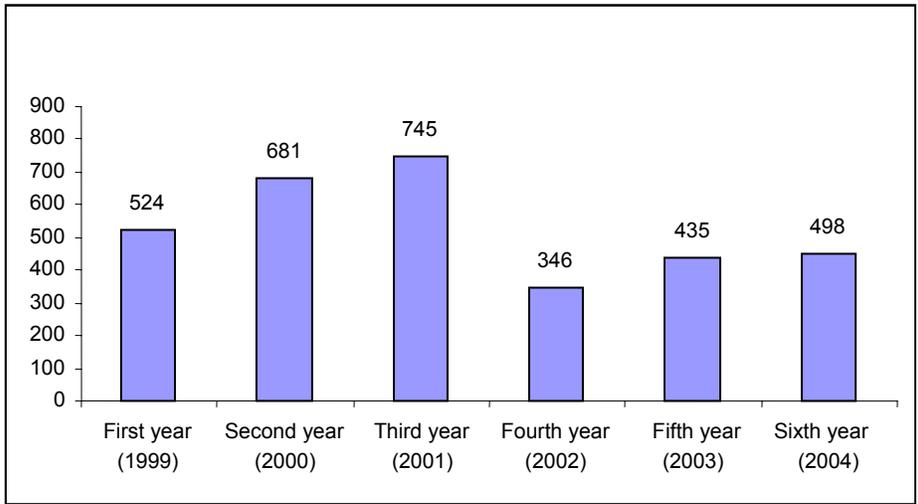


Figure 5. Number of tourists visiting the EMM (1999 - 2004)

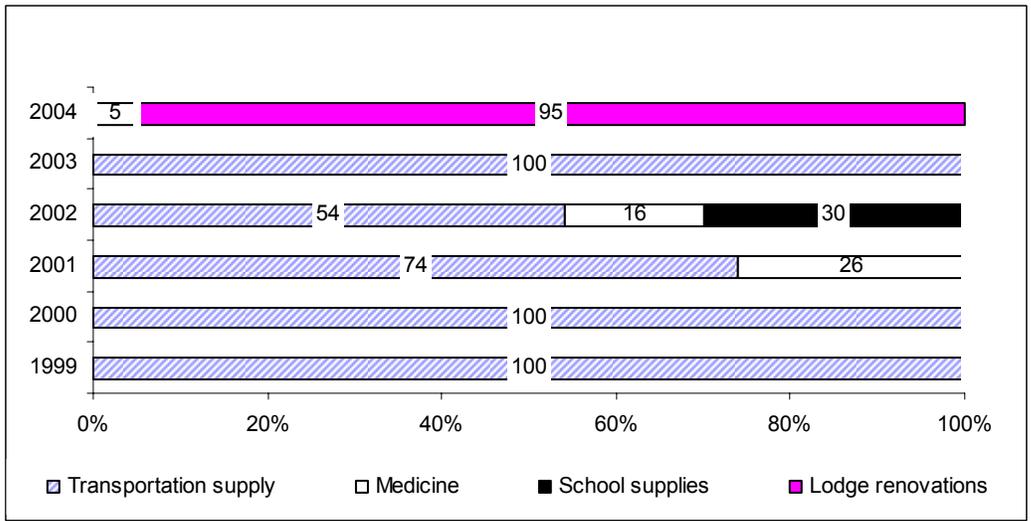


Figure 6. Percentage annual economic benefits for Tayakome & Yomibato from the EMM  
Source: Adapted from Ohl (2004)

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