The use of tourism as a social intervention in indigenous communities to support the conservation of natural protected areas in Mexico

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Abstract

Tourism has been considered a tool for sustainable development (SD) of rural/indigenous communities living within natural protected areas (NPAs) since the 1980s. This article examines the use of tourism as a SD intervention in the management of NPAs. Based on the theory of social change and on the realist methodological approach to social research, the study focuses on the case of Mexico. It seeks to establish causal chains to identify mechanisms that trigger (un)expected outcomes within a specific sociocultural context. The research distinguishes between development of tourism, and SD through tourism. Preliminary findings from on-going research in the indigenous community of Sta. Cruz Tepetotutla in Oaxaca, Mexico point to the necessity for an alterna- tive approach to the design, application and assessment of tourism interventions. It is argued that specific contextual features trigger mech- anisms which lead to (un)expected outcomes. Considering traditional social organization is fundamental to achieve improvement in collective well-being, biodiversity preservation and cultural heritage. The article seeks to help decision-makers improve their outcomes from interven- tions, and to generate further discussion on the use of tourism for the management of NPAs, and on the role tourism can play in the improve- ment of the living conditions of the communities.

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Introduction

Tourism, and specifically community-based tourism (CBT), has been considered a tool for social improvement and environmental protection since the 1980s (Murphy, 1983). However, research has shown that these projects have had poor outcomes, both for the benefit of the host com- munities, and for conservation (Spenceley, 2008). So far, mainstream tourism studies in this field draw particularly upon the development of tourism, based on pro-poor tourism (Bennett et al., 1999) and CBT trends – respectively rooted in pro-poor growth theory (Perry et al., 2006) and community-based and community-driven growth theories (Mansuri & Rao, 2004). As such, these theories focus on the development of the tourism business and an eventual/relative benefit for the local poor. Consequently, social, cultural, environmental and political wellbeing is neglected. This is especially critical when tourism is part of a social intervention strategy both, for social change and for conservation. Thus, these interventions seek environmental conservation and social improvement through tourism projects.

This approach calls for a revision of the key concepts of sustainable development, tourism, and the tourism phenomenon in relation to natural protected areas (NPAs) and their management within a closed and finite ecosystem, which is at the same time complex, diverse and dynamic (Daly & Farley, 2010, pp. 61–76). Drawing on this framework, the discussion about the possible contradiction between the ideas of sustainable development of tourism (as an economic activity), and sustainable development through tourism generates further discussion and future research agendas that will facilitate an understanding of the real role tourism can play – or not – both in the improvement of the living conditions of the communities, and the conservation of biodiversity.

Distinguishing between development of tourism, and sustainable development through tour- ism, this study is based on the theory of change as the foundation of the interventions (Aromatario et al., 2019), and on the realist approach to qualitative research, which seeks to establish causal chains to evidence the mechanisms that can trigger given outcomes within spe- cific sociocultural contexts (Maxwell, 2012). The study analyses the case of Mexico and how it has attempted to use tourism as an intervention to offer indigenous communities sustainable development opportunities as part of the management of NPAs (CONANP, 2011, 2018b). The final part of this paper presents preliminary results of a case study using a mixed method, quali- tative approach to a particular tourism-based sustainable development intervention (TBSDI) in Santa Cruz Tepetotutla, Oaxaca, Mexico, a Chinantec indigenous community which has partici- pated in such initiatives for over 12 years.

In conclusion, we propose an alternative approach to tourism-based interventions focused on local sustainable development through tourism. This approach considers the local sociocultural and socioeconomic context, as well as the host community's needs and expectations into their theory of social change when planning, designing, implementing and evaluating interventions. For this purpose, the traditional social organization and philosophy (comunalidad), as well as local participation, are fundamental to achieve the objectives of improving the quality of life while strengthening local institutions and conserving the physical infrastructure (Barkin, 2009; Martínez Luna, 2011). This approach will improve the outcomes of the interventions, including the conservation and rehabilitation of their ecosystems, the deep symbiotic relationship that indigenous communities have with their traditional territories and their cultural heritage.

Conceptual framework

Natural protected areas and indigenous communities

In the early 1970s, concern for a constantly deteriorating natural environment gave way to a report commissioned by the Club of Rome. The report was developed by the MIT and in 1972, the report was published as The Limits to Growth (Meadows et al., 1972). The UN-UNESCO Man and the Biosphere (MAB) project emerged as a multidisciplinary programme combining natural and social sci- ences to improve human livelihoods and protect natural ecosystems through socially and culturally appropriate strategies (UNESCO/IBEROMaB, 2010). Consequently, NPAs and biosphere reserves, and their corresponding management programmes proliferated at a national and international level. The purpose was, and still is, to preserve, protect and restore the world's ecosystems through specific strategies, often implying the control of land use and natural resources.

In many cases, conservation strategies are centrally designed and determined, without consid- ering the effects on the communities living within or near the NPAs (Méndez-López et al., 2019). The dominant conservation model often advocates the immobilization and isolation of the terri- tory, which causes divergence between conservation purposes and local communities' interests. The traditional relationship between humans and nature, especially in indigenous communities has been significantly altered (D. B. Bray et al., 2007; Chape et al., 2008). In extreme cases, con- servation policies have even forced the displacement of the peoples living within or adjacent to the NPAs (Desmet, 2014; Melubo & Carr, 2019). This has affected the communities' socio-cultural, economic and political structures and interactions, causing conflict, within and between the com- munities, and with the NPAs' management teams. It has also affected the reproduction of their culture, causing the loss of their intangible cultural heritage (Monterroso, 2008).

Estimated at around 370 million, indigenous populations represent a small minority of the world's population. However, and disproportionately, it represents approximately one third of the world's poor (Hall & Patrinos, 2010). Their traditional territories cover up to 24% of the Earth's surface, and about 80% of the planet's healthy ecosystems overlap with traditional indigenous territories (Carino et al., 2009; Watanabe, 2008). A large proportion of the world's healthy ecosystems is located in Asia, Africa and Latin America, which is home to the majority of indigenous communities (UNEP-WCMC, 2018, p. 8). In this sense, historically, indigenous communities have depended on local environments and their resources to survive and have accumulated knowledge about the management of their ter- ritories as complex ecological systems, and at the same time, their entire socio-cultural system has been shaped and determined by their surrounding environment. Consequently, their symbiotic rela- tionship with the natural environment is the basis of their economic, political and social relations. Their strong and deeply rooted social, cultural, economic and internal political organizations have shaped their (our) identity and their particular cosmogonies, which are the essence of their (our) intangible cultural heritage (Arizpe, 2006; Stavenhagen, 2010). Hence, these social groups are the guardians of the majority of the world's traditional knowledge and intangible cultural heritage, add- ing relevance and complexity to the conservation of their territories.

Thus, the combination of poverty, cultural heritage and natural resources at risk necessarily calls for careful planning, design, application and assessment of policies. Therefore, environmen- tal, sustainable development and poverty reduction agencies, governments and NGOs have established a strong agenda of social interventions based on the UN's sustainable development paradigm (Brundtland, 1987), which

was reviewed as the foundation for the UN's Millennium Development Goals (UN., 2000) and more recently for the UN's Sustainable Development Goals (United Nations, 2015).

Seeking better solutions to this challenge, scholars from different disciplines suggest considering traditional natural management knowledge, transmitted and refined from generation to generation, as complementary to that of environmentalists, and advised its incorporation into their conservation strategies (Esfehani & Albrecht, 2018). The inclusion of the communities' rights into a number of strategies should improve conservation and avoid conflict. As a result, in recent years, local populations have been involved with the conservation of their own territories and popular empirical knowledge has been gradually incorporated, in combination with academic knowledge, into the design of conservation strategies (Toledo, 2005).

Tourism, indigenous communities and NPAs

Ecotourism, and its variations have been incorporated into NPA management strategies since the 1970s (de Kadt, 1979). It is generally assumed that tourism can be used as a tool for local development, while preserving the natural and cultural heritage of the host community. Diversification of economic activities, the generation of additional income for the community and the appreciation of local cultural and natural heritage are considered as mechanisms to improve local livelihoods (Stone & Nyaupane, 2018). The study of this issue has been mainly based on two main concepts: Pro-poor tourism and community-based tourism.

By the end of the Twentieth Century, the idea of combining the expansion of tourism with the economic growth of host communities within the pro-poor growth (PPG) model, left the benefit of the poor as a relative and proportional issue (Kakwani & Pernia, 2000). Derived from this general economic growth model, the notion of pro-poor tourism (PPT) emerged from a study commissioned in 1999 by the Department of International Development of the United Kingdom (Bennett et al., 1999). The results of the study led to the inclusion of tourism as an effective tool for poverty alleviation and sustainable development within the UN-Millennium Goals Agenda (UN., 2000). This approach is a guideline for the growth and expansion of tourism (Chok et al., 2007; Saayman & Giampiccoli, 2016). This necessarily implies that the PPT approach may be applied to the tourism sector and its development in general, but it is difficult to consistently relate it to the benefit of the host communities, or to interventions seeking social change.

An additional concept which is deeply related with tourism expansion and environmental pro- tection is that of community-based tourism (CBT), which emerged in the early 1980s, as a response to mass tourism (Murphy, 1983) and is related to the community-based development trend (de Kadt, 1979; Zapata et al., 2011). Even though there is no agreement about its defin- ition, CBT is considered as a for-profit economic activity, and associated with community-based enterprises. In CBT projects, community members' participation, self-determination, empower- ment and inclusion are considered fundamental for their success (Dangi & Jamal, 2016; Strasdas, 2005). However, these concepts are rooted in the relative justice definition (Sachs, 2010) typically involving individuals and not the social group as a whole, privileging economic growth, and its derived access to services and given assets, rather than increasing rights and freedoms, or generating communal wellbeing and/or benefits.

The triple-bottom line approach (TBL) has also been used to plan, implement and analyse ecotourism and its use for conservation. It intends to go beyond the issues of profit, return on investment and stakeholder benefit by considering local social and environmental dimensions to business management (Elkington, 1997; Wood, 2004). It seeks the balance of social, environmental and economic dimensions for the sustainable development of the enterprise through social responsibility measures (Slaper, 2011). When applied to tourism, it keeps the focus on the business and the sustainable development of tourism.

Hence, CBT and PPT and the TBL approaches have been regarded as effective elements to develop more responsible tourism. They share the concepts of poverty alleviation and sustainable development, as well as the idea of tourism as a for-profit economic activity. However, they have been used as fundamental conceptual premises, not only to plan, design and apply tourism development policies at a macro-economic level, but also for externally-funded TBSDIs within NPAs at a micro-economic level (Butler & Hinch, 2013; Honey, 2008), centring the attention on the for-profit roots of tourism and the trickling down of its benefits, concentrating on the development of tourism, rather than on the community's sustainable development through tourism.

In this sense, despite the ever-increasing resources invested in them, while conservation initia- tives have been consistently studied, the outcomes of these interventions remain insufficiently studied, and evidence points at a high failure rate (Dodds et al., 2018; Wardle et al., 2018). The majority of academic studies have been carried out by universities and research centres specialised in tourism development and management in developed countries (Harbor & Hunt, 2021; Job et al., 2017; Spenceley & Meyer, 2012) and most study cases in developing countries, where a great number of TBSDIs have been applied. Despite the difference between the objectives of interventions based on tourism – sustainable local development, poverty alleviation and the protection of their natural and cultural heritage – and those of tourism as a commercial activity (Dodds et al., 2018), the literature demonstrates that research has mainly focused on the business success/failure perspective (Mendoza-Ramos & Prideaux, 2018; Palomino-Villavicencio et al., 2016; Pereiro, 2016), rather than on interventions for social change. In summary, most academic studies assume that the main objective is the development of tourism and consider the wellbeing of the communities a relative and eventual consequence.

Tourism as a form of social intervention

Social interventions are organised efforts to generate social change (Abram, 2010). The purpose is generally to improve human welfare through the use of specific strategies and intervention techniques. These initiatives are externally financed and/or supported programmes to generate pre-established social modifications in favour of the social group they target, and are usually related to development and public policy (Pawson, 2013). These projects depend on public or private donor funds for their planning, design and implementation. As resources are scarce, the monitoring and evaluation of these interventions has become crucial to measure efficiency and efficacy in the achievement of their goals, as well as to generate knowledge to improve their performance (Wholey et al., 2010).

Social interventions seek to directly or indirectly modify the socio-political and cultural elements within the social group, which necessarily affects their interactions and balances (Strengers & Cecily, 2015). The application of an intervention within a given sociocultural context may activate (in)visible mechanisms which lead to (un)expected outcomes. This is particularly sensitive in geographically isolated and

marginalised indigenous communities. Consequently, the assessment of complex interventions, such as TBSDIs in indigenous communities, poses methodological and conceptual challenges, which are further increased by the combination of indigenous socio-cultural contexts and environmental protection objectives.

Designing, applying and evaluating tourism-based sustainable development interventions (TBSDIs) in indigenous communities living within and/or near NPAs

Tourism and local sustainable development are essentially different issues and pursue objectives that may be incompatible; while one seeks the accumulation of capital and economic benefit through the sale of services, the other focuses on the integral development – social, cultural, economic, political and environmental – of the communities that host it. Furthermore, tourism is inherently complex and multidisciplinary with activities carried out in plural contexts, which can lead to a variety of positive and/or negative effects in various dimensions – socio-cultural, economic, political and environmental (Scheyvens, 2014). Therefore, tourism development does not necessarily coincide with the sustainable development of the host community.

Designing, implementing and assessing an intervention for social change in complex and diverse contexts is particularly difficult. It is argued that this issue, which has been practically overseen by academics and consultants, is fundamental for the achievement of a TBSDI and its objectives. It is assumed then, that the theory of social change in a TBSDI applied in an indigenous community in, or adjacent to an NPA, is to improve local livelihoods, while at the same time, preserving their culture and ecosystem, through the tourism activity. Therefore, the main objective of the study was to contrast the objectives of the intervention – the theory of change underlying the project (Aromatario et al., 2019; Weiss, 1995) – with the (un)expected outcomes and explain how, why and under which circumstances these outcomes were obtained (Pawson, 2013; Pawson & Tilley, 2010). Tourism-based sustainable development interventions are applied in highly diverse contexts and are influenced by the different stakeholders – development agencies, intermediaries, environmentalists, the tourism sector, and beneficiary communities – as well as by the power struggles between these stakeholders, at every stage of its design and imple- mentation (Julian, 2016; Nepal & Saarinen, 2016).

Each of these stakeholders have different interpretations about the relevance and purpose of the intervention and about the processes implemented to achieve the desired effects. Stakeholders may have different understandings of the intervention, according to (i) their personal and institutional background and interests, (ii) their concept of sustainable development and environmental protection, (iii) their understanding of tourism as an income-generating economic activity, and (iv) what the welfare of the social group involved implies. These issues necessarily generate a continuous formulation and reformulation of the nature of the intervention and its outcomes (Gillespie & Cornish, 2010). Moreover, in the case of Mexico, documentary research evidenced, on one hand a lack of explicit objectives, and on the other, little information about how the intended change ought to be achieved (CDI, 2013; CONANP, 2009, 2011, 2018b; INPI, 2019; SEMARNAT/CONANP, 2007).

For decades, at the international level, decision makers of social interventions – and of TBSDIs – have favoured the quantification and standardization of the intervention's processes (what and how much), neglecting not only the perspectives of the target social groups, but also the causal chains leading to given outcomes (why and how); favouring an approach to economic growth and relative justice, which gives more relevance to individual-related notions of self-determination, equity and empowerment (Saayman & Giampiccoli, 2016; W. Sachs, 2010). By contrast, indigenous communities privilege absolute

justice, which is directly related to autonomy, solidarity, self-sufficiency, productive diversification, participative decision-making, common labour and sustainable management (Esteva, 2010; Helliwell et al., 2013). Consequently, TBSDIs should base their theory of social change on the improvement of collective wellbeing, rather than that of the individual.

The study of the relationship between poverty and tourism has usually been limited to economic, and to a lesser extent, gender and communal issues. It has used a methodological approach based on processes and results, focusing on the analysis of the way in which interventions are applied, and in the quantitative measurement of results in financial and business management terms, without explaining why and how an intervention is successful or not, in terms of the expected social, environmental, cultural and/or economic change (Frenzel, 2013; Pawson & Tilley, 2010; Stame, 2004). These assessment approaches aim on one hand, to ensure that the protocols and rules of operation are followed, and on the other, to measure the economic impacts of tourism in the communities, while neglecting the analysis of the (un)expected change caused by the intervention (Banerjee & Cicowiez, 2015).

Another frequently overlooked issue, which increases the complexity of TBSDIs, is that interven- tions are embedded in dynamic contexts (Pawson & Tilley, 2004); TBSDIs are influenced by a large number of internal and external variables – such as other social interventions operating simultan- eously, sudden changes at local, regional or national level or natural disasters – which may affect the social and natural context and in consequence, their outcomes. Therefore, attributing specific results to a single intervention becomes extremely difficult (Byrne, 2013; Magalo n de Salazar, 2011; Pawson, 2013). Hence, regardless of the way in which the initial intervention model was designed, a TBSDI is not a static entity, but a dynamic system that adapts and transforms not only from one socio-cultural and socio-environmental context, but also as it passes from one to another actor of the design-implementation-evaluation process (Mark & Shotland, 1985; Pawson, 2013). This often leads to gaps between the initial conceptualization of the intervention and the reality of a TBSDI, its expected impacts, the actual outcomes, and the mechanisms that cause them, which are often concealed in the so-called black box (Pawson, 2013; Zapata et al., 2011).

The impacts of TBSDIs can be measured at different levels (individual, household, community or region) and in multiple dimensions – economic, environmental, social, cultural, political. Thus, designing, applying and assessing an intervention requires a methodological approach that helps to unveil the mechanisms triggered within specific contexts, leading to certain (un)expected outcomes. This allows the interactions between the TBSDI, the dynamic context and the (un)expected change in the beneficiary social group to be established (Chok et al., 2007; Gasco n, 2015).

The case of Mexico

Methodology and methods

This case study is based on preliminary findings of a larger, on-going study analysing the use of tourism as interventions for social change in NPAs. The research sought to understand a tourism-based intervention as part of a set of environmental, conservation and local sustainable development strategies. It used an innovative qualitative research approach to unveil the mechanisms activated through intervention processes within the sociocultural context of the benefited social group, and to

explain the processes of change generated in the benefitted community (Trau, 2012; Zapata et al., 2011).

Data were collected through different methods. Firstly, secondary data were used for the literature review, which was carried out between October 2019 and July 2020. The documents came from official tourism-based programmes developed by the Mexican Government, government policies, peer-reviewed journal articles, books, annual reports and online sources. Secondly, primary data were collected though different research tools: semi-structured interviews, focus groups, participant observation and a field diary to understand how and why the tourism-based intervention yielded (un)expected outcomes. The fieldwork was carried out between December 2019 and May 2020. This involved a variety of stakeholders (decision-makers, practitioners, consultants, community leaders and members directly involved in the projects) and their particular social contexts.

Participants' ages ranged between 18 and 68 years, of these, 12 were women and 49, male. Respondents were categorised as:

- External: Decision-makers (designers and planners of TBSDIs in Mexico City [4þ2], in the State of Morelos [2] and Oaxaca [4]);

- Liaisons: intermediaries [2] and consultants [3]; and

- Internal: Community leaders (State of Morelos [1], Oaxaca [2], Santa Cruz Tepetotutla [4] and community members directly involved in the project [4]. Focus group participants [2 12 1⁄4 24].

Data analysis consisted of transcribing the field diary and the interviews and audio recordings of focus groups. After several readings, data were translated from Spanish into English and systematically organised, coded, and categorised with the aid of NVivo, a data organization software. Data were then analysed based on the hypotheses in the form of causal chains, to further refine the foundational theories of tourism interventions. This analysis was based on critical discourse analysis as the analysis of discourse (written and/or spoken) considering the way social power, dominance, and inequality are practiced and reproduced (van Dijk, 2008).

Mexican indigenous communities, land tenure system, and natural and cultural heritage

Mexico is one of the five most biologically diverse countries worldwide. It is also host to at least 68 different linguistic groups and around 364 variations of them (Berger et al., 2020). Its indigenous population represents around 10% of the country's total, of which around 10 million live in extreme poverty; many of them marginalised and geographically isolated (Berger et al., 2020). However, about 70% of the national territory is socially owned by rural/indigenous communities. This means that private property in their territories is practically non-existent and that these social groups own circa 80% of the healthy ecosystems and are the custodians of most of the intangible cultural heritage of the nation (Arizpe & Nalda, 2003; Battlori Guerrero, 2005; Reyes et al., 2012).

Despite their diversity, the integration of their internal social, cultural, economic and political structures and institutions can be defined as comunalidad. This social system is made up of two dimensions: the first is the notion of community as a complex system composed by evident traits: a social group that, besides sharing a common history, also shares a present and a future. The community is understood

through its symbolic relationship with the natural environment, and through the interactions within the social group. Collective interactions are considered more relevant than individual relationships; the rules of coexistence are collectively established and interpreted based on nature itself and on knowledge passed from one generation to another (Dıaz Gomez, 1994; Martınez Luna, 2013).

The second dimension is communality as the foundation of the community. This is determined by abstract notions of the traditional territory. Decisions are made through democratic consensus reached within the communal assembly. Work has a social value, and common work – tequio – is voluntary, unpaid work in public service. Rites and ceremonies are the expression of the community's cultural heritage and cohesion. Consequently, to understand the apparent elements of the community, it is necessary to understand the intangible notion of the communal as collective and collaborative. The interactions between these two dimensions, and among the different elements and their natural territory, represent the community's complex operation system. Moreover, the communal way of life is not always explicit, but is tacitly present, and usually becomes evident when an individualistic attitude emerges (Martınez Luna, 2011; Rendon Monzon, 2003). The collective essence defining indigenous communities has been amply documented by different anthropological studies (see Barthas, 1997; Bonfil Batalla, 1995; Rendon Monzon, 2003, among others).

Thus, indigenous life is only possible in a specific natural territory, which is symbolically owned, understood and appropriated; a territory inhabited by people, nature and often by supernatural forces which interact within it. Social relationships are ritually determined and explained through myths and other narratives. The territory is commonly owned and is home to the community, which is composed of families, intertwined by kinship, power and ritual links. Community members build their community life on reciprocity and participation as a fundamental rule. Reciprocity and participation are based upon common, voluntary labour, on the exercise of power, and on rituals and festivities, which serve to generate cohesion, achieve collective goals and solve common problems (Barabas, 2004). Community members express their will of being part of their community through voluntary collaboration, reciprocity and participation. Common labour is considered not only a moral duty, but also a trait of identity, engagement and rootedness. For this reason, those who refuse common labour or mutual help – tequio, faena, or fagina – reject the charges or duties they are elected for, or cease to participate in the festivities, tacitly implying they do not want to be part of the community, and are willing to lose their rights (Millan & Valle, 2003).

This kind of social organization is not exclusive of indigenous social groups. Many non-indigenous rural communities have the same traditions of reciprocity, participation and common labour, and make decisions through their assembly, due to the historically common ownership of the land and their symbiotic relationship with it. What distinguishes these communities from indigenous communities is their ethno-cultural elements – the local organization based on the common language, their particular world views (usually of Pre-Hispanic origin), their corresponding rituals and festivities, the use of traditional clothing, the local cuisine, among many other aspects. It could be stated that indigenous/rural communities base their social life upon the fundamental elements of common life, and that the difference is defined by the degree of conservation or loss of the ethnic elements (Bonfil Batalla, 2012; Warman, 2003; Zizumbo Villarreal, 2013).

These elements, combined with geographic isolation, generate an economic organization which is weakly linked to the mainstream market, in which social value and barter are more relevant than money and price (fundamental for capitalist economic relations). Therefore, money is not their main exchange factor (Carlos & Pardo, 2019; Cassano et al., 2003). Subsistence economy, common land tenure and the

practical absence of paid labour gives their work a social value. Furthermore, leading subsistence economies and their geographical isolation hinders the notions of accumulation or financial planning. Consequently, their relationship with the mainstream market is marginal, as is their understanding of service-based economic activity. For these social groups, money is only useful to relate with the outside and acquire goods or services that are not locally available. Hence, the insertion of tourism in these social structures may pose a serious challenge for the activity to succeed, as well as a huge risk of disruption for the local socio-cultural and socio-economic traditional structures (Barkin, 2009; Carlos & Pardo, 2019).

Mexican Strategic Framework for Sustainable Tourism in Protected Natural Areas

Natural resources protection in Mexico dates to the 1920s (CONANP, 2018a). Since then, the conservation of biodiversity has consistently advanced. By 2018, Mexico had a total of 182 federal NPAs covering 90,839,521.55 ha (CONANP, 2020). Regulated by the General Law of Ecological Balance and Environmental Protection, they form the National System of Natural Protected Areas, and since 2000, they are managed by the National Commission of National Protected Areas (CONANP), dependent on the Ministry of Environment and Natural Resources (SEMARNAT) (CONANP, 2018b).

The federal NPAs are distributed in six categories with different management strategies, according to their biophysical and social characteristics, therefore, each has different regulations for tourism activities: Areas of Flora and Fauna Protection (40), Natural Resources Protection Areas (8), Natural Monuments (5), National Parks (67), Biosphere Reserves (44) and Sanctuaries (18). An additional kind of NPA, which is legally acknowledged, is the areas voluntarily destined for conservation (AVDC). Until 2017, CONANP had certified a total of 388 AVDCs covering a total of 417,562.27 hectares (CONANP, 2018b). Finally, there is a high number of parks and reserves at a regional level, which are heterogeneous in legal-administrative terms and vary considerably depending on each local legislation (CONANP, 2018b).

Despite the existence of a legal framework, environmental protection policy in Mexico faces a series of challenges: the increasing pressure on natural resources due to the colonization of ecologically fragile areas, the advance of agrarian borders and international and national extractive interests. In addition, the complex land tenure system, composed by ejidos and indigenous communal land, means that the land boundaries are often uncertain and therefore in dispute (Chapela y Mendoza & Barkin, 1995; Ortega-Rubio, 2018). This situation not only facilitates the entry of foreign actors interested in the irresponsible use of natural resources (Moreno-Barajas et al., 2019), but also gives way to corruption (Morales Garcia & Morales Garcia, 2017). These issues constitute a major management problem for the NPAs, as well as for the practice of sustainable and economically viable tourism (Ortega-Rubio, 2018). Hence, the Mexican government recognized nature conservation as a State policy and as part of the National Development Plan (Poder Ejecutivo, 2013). The main approach of the 2019-2024 environmental policy regarding protected areas is to achieve sustainable development and conservation, and CBT has been consistently considered as part of this approach (CONANP, 2018b).

The case of Santa Cruz Tepetotutla, Oaxaca, Mexico

The Chinantla region in the State of Oaxaca, Mexico, is recognized as the third best preserved cloud forest in the country. Since 2004, the indigenous Chinantec community of Santa Cruz Tepetotutla voluntarily destined 9,670ha of its 12,000ha territory for conservation as an AVDC (CONANP, 2020). According to the community leaders, they started to receive payment for environmental services in 2014.

Interviews with the elders demonstrated that the community has a deeply rooted sense of conservation of their natural environment:

We may not have resources, but we have what is elemental. In the forest, no ... you might not believe me, but in the forest, there is everything; in the forest, there is a great amount of edible plants for the communities ... plants ... many things, then ... in the forest [...]

[...] The forest is water catchment, isn't it? And this is fundamental. Without water, there is no life. Hence, that is what, hmm, we have procured in our communities [...]

[...] Because we have had more than enough reasons. This is ours, and belongs to the community, and we do not want to destroy it; we want to inherit this to our future children.

The community leads a subsistence economy. They produce corn, chillies and beans for their own consumption and grow coffee and vanilla. They also produce honey and some preserves. However, they have not yet managed to commercialise their products and access to the area is extremely difficult.

In 2008, Fundacio n Grupo Modelo financed a TBSDI in the community seeking to support the conservation of the Papaloapan river basin and its pristine cloud forests, while providing the community with opportunities to improve their livelihoods. Based on its outstanding natural and cultural heritage, the project managers (PMs) stated that they intended to attract researchers and ecotourists willing to pay fairly for comfortable lodging facilities and good food (the area has one of the most interesting and rich cuisines in the country).

The project consisted of three interrelated initiatives: a preserves workshop, a set of backyard greenhouses and an ecolodge to host visitors. According to the PM, the financing agency agreed with the Assembly, which is the highest authority in the community, that three groups of single mothers would be in charge of the initiatives. Additionally, five male guides were democratically appointed to manage three eco-trails. All participants were provided with professional training and equipment – the researcher was involved in this process for nine months. The community contributed with unpaid labour (tequio) to the construction of the infrastructure and provided food and lodging for the training staff.

Over five years later, the researcher returned to the community to find that the outcomes were far from the social change it intended to generate. Since then, research has been carried out to understand why and how these outcomes were generated.

According to the PMs, although the community participated in it, the intervention was designed considering the tourists' potential demands, rather than the community's circumstances, needs and expectations, following the CBT (development of tourism) conceptual framework. During fieldwork, the researcher observed internal conflict and poor service quality.

In the ecolodge, western-style beds with sheets and blankets, warm running water and toilets, as well as the gas range were practically unknown to the appointed staff. Almost no home in the community had these items and facilities: they sleep on petates (straw mats) on the floor, there is no warm water, they have latrines outside their homes and most of them cook on an open wood fire.

Community leaders stated that after the funding agency left in 2008, the Assembly decided not to comply with the agreement of maintaining the group of women as managers of the eco-lodge and continue with their mores and customs. They voted for the creation of the Tourism Committee, appointing a group of young men for the three-year job. The appointed staff (2020) stated that they hadn't been trained to provide the service and argued they were unwilling to work, because they consider cleaning and cooking as chores for women.

By contrast, the women are almost incapable of thinking of selling the food they cook for money. In this sense, a young mother stated:

We have it from birth. My mother taught me since I was little. First you do errands and from there we learn to wash the nixtamal, grind it on the metate[1], to make tortillas, and to put it on the comal. I let my girls play with the dough since they were very little. As you can see, the youngest (3 years old) can make gorditas[2]!

Labour has a social value and is determined by gender and tradition. It is strongly related to the population's identity. When asked about paid work, respondents reported that in the beginning (2008), they did not think of economic income; their main concern was that their young men and women were forced to migrate, they wanted them to stay.

[...] It is with great grief we see how our children are migrating, but we cannot stop them, because there is no option of ... of how to and say: you know? stay! They are forced to leave, for there is no alternative to retain them [...]

However, this has changed (2020), the young men engaged in the project stated they do have interest in earning money, but it became clear that their linkage with the mainstream market is still limited. The community has not been able to commercialise their products, and in general, for them it is unclear how work should be priced, how products are sold, or what they should charge for the services they provide. These issues may seem simple when assessed from a western-urban perspective but are extremely complex for them to understand and culturally are deeply disrupting for the community. Furthermore, individual paid work, revenue distribution, economic benefit, surplus and financial planning are totally incompatible with a subsistence economy and contradict the value system of common labour, social benefit and solidarity.

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[1] Grinding stone
[2] Thick, small tortilla-like flatbreads

Discussion and conclusion: an alternative approach to tourism used as part of NPA management

The research has so far demonstrated that decision-makers assumed tourists would be willing to pay fairly for high quality lodging and food services. This should improve the women's livelihoods through the increase of their economic income. However, accessibility, economic and cultural issues have demonstrated that the geographical, socioeconomic and cultural contexts play a fundamental role in the outcomes of the intervention.

The community expressed that they related tourism to what they had seen on TV: like in Acapulco and they expected mass tourists to arrive. Furthermore, they stated that in the beginning, they did not consider income as fundamental; based on their concept of common labour, they expected their young members would have attractive activities, so they would not be forced to migrate to the cities or abroad. The community expressed their concern for their families, the future of the community and the conservation of their rootedness and cultural identity. In this sense, PMs, consultants and the community did not fully share their views about what they expected from the intervention.

The research also evidenced that this perspective has evolved over the years. Community members who migrated have returned and their experience has influenced the social group, generating relevant cultural modifications at different levels. Examples are that young men have become interested in getting their job paid, that women are starting to participate in the charges and that Internet connectivity has arrived to facilitate communication with possible tourists; although computers are very scarce, by February 2020, almost every household had a cell phone.

This case shows that the business management analysis approach alone is insufficient to understand how, under which circumstances and for whom a TBSDI with specific social change theories and objectives, works. Hence, the study of these interventions calls for a totally different analytical perspective; one that allows the understanding of the causal chains that lead to given outcomes, within specific social, environmental, economic, political and cultural contexts. It has been established that understanding tourism as a social intervention seeking social betterment while protecting the natural and cultural heritage poses important conceptual and methodological challenges and that the context in which TBSDIs operate is highly complex. The task calls for an adequate conceptual framework, and a methodological approach which allows the mecha- nisms contained in the so-called black box of the intervention to be unpacked (Aromatario et al., 2019). This approach also needs to encompass indigenous communities' sociocultural and socio- environmental contexts – comunalidad (Martínez Luna, 2016). These elements constitute the foundation, values, premises and expectations of the actors involved in the TBSDIs.

In this sense, tourism used as an intervention for social change also necessarily shifts the attention from the tourism business, to the modifications sought by the intervention. The scope moves from the business success/failure factors, to consider highly complex social, economic, cultural, political and environmental interactions, influenced by interests and power struggles. Therefore, a deep knowledge of the sociocultural, socioenvironmental and socioeconomic con- text is necessary for the planning, design, implementation and evaluation of the intervention, to develop a solid theory of the change that is expected, and the strategies to achieve it. Consequently, the emphasis should lie upon the community's needs and expectations and the tourism project should be regarded as a means. In other words, the planning and design of a TBSDI for an indigenous community living within or adjacent to a NPA needs to be carried out in terms of expected/unexpected outcomes of the intervention and of the

social change to be achieved. The success/failure of the business should be considered as part of this strategy.

Furthermore, TBSDIs as part of NPA management require very careful planning with full and active participation of the community, prioritising real informed consent and involvement of the social group. This implies real and deep-reaching communication between the stakeholders. In this sense, the degree of intersubjectivity (Gillespie & Cornish, 2010) on what is being discussed, expected and done is fundamental. Hence, it is essential that programme planners, designers, decision-makers and practitioners consider the particular communal organization of the social group, their conception of collective well-being over that of the individual, the relevance of solidarity, collaboration, communal decision-making and social value of labour. This will ensure that the delicate balances which underpin the cultural resources that give the community identity and rootedness are not disrupted, so protecting the local cultural structures and institutions. The importance of common land tenure, social relations, rituals and traditions, and the community's symbolic and symbiotic relationship with its natural environment must also be recognized. In the end, their cultural heritage constitutes their identity and uniqueness. Their cultural identity is their main tourism asset and simultaneously their opportunity to gradually incorporate what they need from Western culture and technology to survive as unique, distinct social groups.

The research also indicates that TBSDIs as part of NPA management strategies should be guided by alternative economic theories, such as ecological economics (Barkin & Lemus, 2014; Daly & Farley, 2010), which provide alternatives for these social groups to establish links with the mainstream market, thereby retaining their own values and knowledge through comunalidad as their traditional sociocultural, political and economic organization. Their collaboration and solidarity features are important assets to make common interest prevail over that of individual benefit through the implementation of cooperative structures (Barkin & Lemus, 2016, pp. 257–286; Esteva, 2009; V. M. Toledo, 2004).

The analysis proposes the use of realist theory-driven methods to plan, design, implement and assess TBSDIs as part of natural conservation projects, which advocate the consideration of the context in which the interventions take place as well as the possibilities for triggering given mechanisms to yield the expected outcomes. The study also demonstrates the need for further research on this matter, as the iterative nature of the methodological approach is based on the accumulation of knowledge, the detection of patterns, and the refinement of the theories of how social change can be achieved, which should lead to constant improvement of the design, implementation and assessment of the processes and outcomes of these interventions.

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