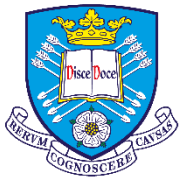

The University Of Sheffield.

Tourism from below:
An approach for the realisation of community life projects

By

Itzel San Roman Pineda

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Dedicado a:

Las comunidades de Chunyaxche, San Felipe y 20 de Noviembre.

Aquellos que desde los márgenes trabajan por crear un mundo más justo.

Mi padre.

Dedicated to:

The communities of Chunyaxche, San Felipe and 20 de Noviembre.

All those working on the peripheries to make the world a better place.

My father.

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Abstract

This investigation explores the experiences of the different actors involved in tourism for development (T4D) initiatives implemented in three indigenous and rural communities located on the Yucatan Peninsula, Mexico's most touristed region. While T4D is promoted as a catalyst for the sustainable development of marginalised communities, many T4D initiatives fail to engage communities and have a short lifespan. However, the communities studied, developed community-based tourism (CBT) ventures that have been operational for over a decade, and their stories contribute to the critique of T4D and CBT scholarship from a grassroots perspective. To perform this analysis, I draw on the theoretical frameworks of Sustainable Livelihood Strategies and Latin American debates on the Social and Solidarity Economy (SSE). These theoretical lenses facilitated the re-signification of tourism through the eyes of tourism-embracing communities.

Interviews with the actors involved in T4D in these communities, participant observation, and participatory network diagrams of economic interactions, enabled understanding the perspectives and meaning placed on tourism by the host communities. The conflicting viewpoints of the various actors involved in T4D, combined with the application of the sustainable livelihood framework, facilitated identifying failures in T4D initiatives, currently unrecognised in the literature, that prevent tourism from generating development as communities envision it. Furthermore, by applying the SSE to the analysis of the empirical data, revealed tourism gains that the present T4D literature overlooks, as these gains are non-monetizable but empower communities to fulfil their life projects. This is a contribution to the SSE literature as well, as it demonstrates tourism potential to develop the SSE, a sector that this literature overlooks due to its neoliberal origins.

The findings presented in this investigation demonstrate the need to redesign T4D so that, rather than focusing on the sustainability of tourism, it concentrates on the sustainability of livelihoods and community objectives.

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List of acronyms and abbreviations

Abbreviation	Meaning
ALTER	*Actuar Local para el Turismo Ecologico Responsible* (Act Locally for Ecological and Responsible Tourism civil association)
AMLO	President Andres Manuel Lopez Obrador
ASK	*Amigos de Sian Ka'an*
BANXICO	*Banco de Mexico* (Bank of Mexico)
CBO	Community-based organisation
CBT	Community-based tourism
CDI	*Comision Nacional para el Desarrollo de los Pueblos Indigenas* (National Commission for the Development of the Indigenous People)
CIT	*Tourist Information Centre*
CLPs	Community life projects / Communities' life projects
CONABIO	*Comision Nacional para el Conocimiento y Uso de la Biodiversidad* (National Commission for the Knowledge and Use of Biodiversity)
CONAFOR	*Comision Nacional Forestal* (National Forest Commission)
CONANP	*Comision Nacional de Areas Naturales Protegidas* (National Commission of Natural Protected Areas)
CONEVAL	*Consejo Nacional de Evaluacion de la Politica de Desarrollo Social* (National Council for the Evaluation of Social Development Policy)
CPTQ	*Consejo de Promoción Turística de Quintana Roo* (Council of Tourism Promotion in Quintana Roo)
DATATUR	*Instituto de Estudios Turísticos* (Tourism Statistics Information System)
FIRA	*Fideicomisos Instituidos en Relación con la Agricultura* (Trust Funds for Rural Development)
FITUR	*Feria Internacional de Turismo* (International Tourism Trade Fair)
FMNC	*Fondo Mexicano para la Conservación de la Naturaleza* (Mexican Fund for the Protection of Nature)
FOGATUR	*Fondo de Garantía y Fomento de Turismo* (Trust for the Guarantee and Promotion of Tourism)
FONATUR	*Fondo Nacional de Fomento al Turismo* (National Trust for Tourism Promotion)
GDP	Gross domestic product
IADB	Inter-American Development Bank
ICT	Information and communication technology
ICTUR	*Instituto de Competitividad Turística* (Institute of Tourism Competence)
IMF	International Monetary Fund
IMPLAN	*Instituto Municipal de Planeación* (Planning Municipal Institute)
INAH	*Instituto Nacional de Arqueología e Historia* (National Institute of Archaeology and History)
INEGI	*Instituto Nacional de Estadística, Geografía e Informática* (National Institute of Statistics and Geography)
INFRATUR	*Fondo de Promoción e Infraestructura Turística* (Trust for the Promotion of Tourism Infrastructure)
INI	*Instituto Nacional Indigenista* (National Indigenous Institute)
INPI	*Instituto Nacional de los Pueblos Indígenas* (National Institute of Indigenous Peoples)
IPC	Integrally Planned Centre
MSMEs	Micro, small, and medium-sized enterprises

MXN	Mexican Pesos
NGO	Non-governmental organisation
NPA	Natural protected area
NSE	Network of social exchange
PE	Popular Economy
PEO	Popular economy organisation
PROFEPA	*Procuraduría Federal de Protección Ambiental* (Federal Attorney for Environmental Protection)
PTAZI	*Programa de Turismo Alternativo en Zonas Indígenas* (Program of Alternative Tourism in Indigenous Communities)
RAV	*Reproducción ampliada de la vida* (Production and reproduction of a broaden life
SAPs	Structural Adjustment Projects
SDGs	Sustainable Development Goals
SECTUR	*Secretaria de Turismo* (Ministry of Tourism)
SEDESOL	*Secretaria de Desarrollo Social* (Ministry of Social Development)
SEFOTUR	*Secretaria del Fomento al Turismo en Yucatán* (Ministry of Tourism in Yucatan)
SEMARNAT	*Secretaria de Medio Ambiente y Recursos Naturales* (Ministry of the Environment and Natural Resources)
SHCP	*Secretaria de Hacienda y Crédito Público* (Ministry of Treasury)
SNIEGT	*Sistema Nacional de Información Estadística del Sector Turismo* (National Tourism Statistics Information System)
SNIGF	*Sistema Nacional de Información Forestal* (National Forestry Information System)
SSE	Social and Solidarity Economy
SSTI	Social and Solidarity Tourism Initiatives
T4D	Tourism for development
TTD	Traditional Tourist Destination
UADY	*Universidad Autónoma de Yucatán* (Autonomous University of Yucatan)
UN	United Nations
UNDP	United Nations Development Program
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	World Tourism Organisation
WB	World Bank
WTTC	World Travel & Tourism Council

1 Introduction

1.1 Filling the gap: A grassroots perspective on Tourism for Development

“I want a tourism that benefits me and doesn’t harm me. Sadly, that happened to Cancun, (…). That tourism is no longer sustainable. Why? Because it caused problems for everyone. (…) as [tourism] grew it generated drug addiction and violence (…). That is not what I want for San Felipe (...).”

Partner of a tourism community-based organisation (CBO) in San Felipe, Yucatan 2019

“(…) a non-governmental organisation (NGO) approached us with a project to increase the Melipona bee population to increase honey harvesting and sales of honey-based hygiene products. (…) After three years, the bee population did not grow, and they [NGO] wanted us to do tourism, as beekeeping alone did not provide enough income to support our livelihoods (...). Now, we enjoy the benefits that this honey provides; we can consume it, it contains medicinal properties, and we can share it with our visitors, who love it. (…) tourists learn about the Melipona bee (…) and they purchase our honey-based products, which allows us to maintain the bees while also earning some money."

Partner of a tourism CBO in Ejido 20 de Noviembre, Campeche, 2019

“(…) We created the cooperative in 2013 (…) However; we [the cooperative's members] worked as boat tour guides for 49 years (…). I was lucky to continue working here because I enjoy interacting with tourists (…) and you learn a lot. I was unable to attend school, but through my work I learned English, which worked out well, and I began earning money to support my family (…)”

Partner of a tourism CBO in Chunyaxche, Quintana Roo, 2018

"Because there are three beach booths, they [the government] limited the amount of beach beds each of us could rent, everyone has 15 beach beds." (…) We established rental rates for this equipment (...) we agreed to charge $200 pesos for a beach bed, as is usual in other places, but this was unfair because some customers rented the bed for only an hour. Therefore, we decided to charge a fee of $20 pesos per hour or $100 for the entire day. (…) We also formed agreements among ourselves; each beach

booth sells something distinct (…). This led to fewer disagreements between ourselves and with the tourists (...)."

Partner of a tourism popular economy organisation (PEO) in San Felipe, Yucatan, 2019

The previous statements reflect the experiences of four residents from three distinct Indigenous and rural communities in the Yucatan Peninsula, Mexico, with regard to tourism. While the residents of the communities had unique and different viewpoints about tourism, there were apparent commonalities, which shaped the findings of this doctoral project. Firstly, the members of the tourism community-based organisations (CBOs) did not seek excessive growth with regard to their tourism ventures as they all wanted to attain a livelihood. They feared that the problems seen in famous tourist destinations in and nearby Cancun, such as the increase of drug consumption, insecurity and violence, would pervade their communities. Secondly, residents across the communities studied saw tourism as a new livelihood strategy that complemented rather than substituting their traditional economic activities, such as agriculture, timber, and fishing, among others. This perspective clashed with the objectives of tourism facilitators [NGOs and government institutions who implemented tourism for development (T4D) initiatives], as they aimed to substitute the communities' traditional livelihood strategies with tourism for environmental protection. Therefore, most of the inhabitants of these communities remained excluded from T4D. Thirdly, tourism CBO members implemented solidary principles to ensure that the broad majority of their members had equal opportunities to consolidate tourism as an additional livelihood strategy. Fourthly, the residents of the communities identified benefits from tourism that current T4D scholarship and tourism practitioners overlook. These benefits are non-monetizable but, according to the residents of the researched communities, empowered them to take meaningful action to improve their lives.

The findings I present in this thesis are based on the many interviews I had with the actors involved in T4D initiatives in the communities of Chunyaxche, located in the State of Quintana Roo; Ejido 20 de Noviembre, located in Campeche State; and San Felipe, located in the State of Yucatan. The interviewees included residents of the communities involved, directly and indirectly, in tourism; as well as tourism facilitators operating in each community, tourism consultants, academics and tourism intermediaries [tour operators, tour guides and tourism network operators]. I complemented these actors' perspectives with participatory network diagrams of their economic interactions and participant observation of tourism operations, as well as interactions with visitors and community life, to provide a critique of the current scholarship on Tourism for Development (T4D) and of Community-

Based Tourism (CBT), by presenting a thus far missing grassroots perspective on these bodies of knowledge.

T4D scholarship has studied the impact that the sector generates on the geographies where it is implemented. T4D has evolved from promoting international tourism as an engine of economic growth of developing countries to promote alternative and sustainable tourism models for the development of marginalised communities in countries in the Global South. Alternative tourism models, which include ecotourism and CBT, are depicted as a vehicle by which to strengthen communities' livelihood strategies without the negative consequences of international tourism.

However, critical studies of T4D recognise that these models have negative social and economic impacts on the communities where they are applied, and that the gains from tourism never reach the broad population. This has led to the increase in scholarship that analyses T4D through social justice lenses, and therefore promotes the theoretical construction of "just destinations"; being these places where tourism operates with social justice and protects the dignity of the people of the communities (Jamal and Camargo, 2014a). Nevertheless, these theories are constructing "just tourism models" as top-down initiatives, neglecting tourism-embracing communities' perspectives and desires.

This thesis addresses this gap in the literature and advances a bottom-up critique of T4D and CBT Through the analysis of the tensions between the statements of tourism facilitators and residents in the host communities, I was able to identify T4D failures currently unacknowledged in the literature. These failures preclude the participation of most host communities and inhibit long-term CBT sustainability, having originated in divergences in aims and objectives between facilitators and host communities and how they each define tourism.

Moreover, the dissertation's theoretical framework builds on what the communities understand as 'development' and formulate a critique of the T4D literature that draws from sustainable livelihood theories and Latin American discussions on the Social and Solidarity Economy (SSE). Communities' residents defined development as satisfying their common needs and legitimate desires, which prompted the adaptation of Blaser's *'life projects'* (2010 p.p. 2), used in this thesis as community life projects (CLPs). The conceptualisation of CLPs allowed me to identify unintended gains derived from the adaptation of CBT to the cultures of reciprocity and solidarity of the host communities. These gains were depicted through the operationalisation of the SSE's guiding principles framework developed by Coraggio (2011b).

The application of sustainable livelihood theories to T4D and CBT adds a new dimension to this body of knowledge by situating tourism within the communities' system of livelihood strategies, thereby

providing a bottom-up understanding of tourism based on host community needs. The incorporation of the SSE framework into T4D adds to both bodies of knowledge. For T4D, the SSE facilitated the identification of non-monetizable gains, disregarded in T4D literature, that enable communities to meet their CLPs. For the SSE, this thesis demonstrated the potential for the SSE development through tourism, a sector that is frequently overlooked in SSE scholarship due to the neoliberal origins of tourism. This dissertation presents the first-time operationalisation of Coraggio's (2011b) SSE's guiding principles framework using CBT.

1.2 Tourism for Development's Neoliberal Genesis

Since the late 1960s, the World Bank (WB) and the International Monetary Fund (IMF) have promoted tourism as the economic panacea for developing countries. They initially promoting international tourism because it supported the diversification of the economies away from dependency on traditional exports, generating foreign exchange earnings, creating employment, and having a multiplier effect on other industries (Brohman, 1996, Hampton and Jeyacheya, 2015, Jenkins, 2015, Schilcher, 2007). Tourism was introduced through Structural Adjustment Projects (SAPs) that aimed to help developing countries, which were highly indebted due to the failures of the import-substitution industrialization model that operated from the 1940s to the 1970s. The SAPs conditioned funds to the implementation of structural reforms that fostered the adoption of the neoliberal economic model.

Neoliberalism meant the liberalisation of the economy using a market-based system where the laws of supply and demand would determine the most efficient economic outcomes (Wearing and Wearing, 2016). This economic liberalisation required the privatization of strategic resources, industries and state-managed companies, the reduction of State interventions in the regulation of the economy, reduction of social protection, financial liberalisations, labour and environmental deregulation, among other reforms (Gago, 2017, Hellman, 1997).

Many sectors adapted to embrace the neoliberal agenda; to set an example, in Mexico, in the case of agriculture the State reduced subsidies to this sector and fostered foreign and national investment. Additionally, the government changed the legislation that permitted the privatization of *ejidal* land[1], thus opening up the countryside to foreign investment (Hellman, 1997). Tourism was a tool that enabled neoliberal expansion, as it facilitated the entrance of foreign capitals to unreached

[1] *Ejidos* are a mechanism of restitution of land to indigenous and rural communities for their collective ownership and usufruct (SNIGF, 2018b, Mallen Rivera, 2017, Flores Rodriguez, 2008).

geographies for their –almost- exclusive usufruct of the natural and cultural resources as well as the exploitation of the labour force (Devine, 2013, Duffy, 2015). The effects of tourism's neoliberal character are visible in the negative economic, social, cultural, political and environmental effects that have dramatically enlarged inequalities within tourist destinations and towards rural communities in the vicinities of these (Alvarez, 2014b, Brohman, 1996, Hampton and Jeyacheya, 2015, Jenkins, 2015, Lacey and Ilcan, 2015, Schilcher, 2007).

With the popularisation of a sustainable economy, the WB, IMF and the World Tourism Organisation (UNWTO) have continued to foster tourism as a driver of development, using "alternative" tourism models like sustainable tourism, ecotourism, pro-poor tourism, and community-based tourism (CBT)—which is the model this project analyses—among many others. These tourism models are promoted as engines of economic growth, environmental protection, sustainable exploitation of natural resources and higher engagement of marginalised and indigenous communities to ensure they retain the majority of the economic gains (UNWTO, 2019). Nevertheless, the implementation of alternative tourism models has enabled tourism to continue its expansion towards marginalised and indigenous communities, to commodify nature, wildlife, culture, history and identity of people and places (Devine, 2013).

These sustainable tourism models have failed to achieve the western goals of long-term "sustainable development" in the communities where it has been implemented in Asia and Latin America (Jamal and Dredge, 2014, Jamal and Camargo, 2014a, Lacey and Ilcan, 2015, Schilcher, 2007, Hampton and Jeyacheya, 2015). Some explanations suggest that the pressures exercised by a market-oriented economy, private and public sectors have caused such failure. The pressure of a market-oriented economy force countries to relax their regulations to allow the participation of foreign investors that displace local enterprises (Lacey and Ilcan, 2015, Hampton and Jeyacheya, 2015). Additionally, the government and the private sector in many instances discourage the communities' involvement, due to bureaucratic procedures and corruption in both sectors (Lacey and Ilcan, 2015, Schilcher, 2007).

Academics have remarked that T4D initiatives have failed to engage communities' populations across the Global South. Even though T4D is proposed to be a driver of development that benefits communities' livelihoods, most of these initiatives do not consider the residents' perspectives and interests (Mitchell and Muckosy, 2008). Therefore, T4D is mainly conceived as a western imposition to marginalised and indigenous communities who attach different meanings to development, sustainability, livelihood strategies and forms of social organisation of work.

This highlights the lack of a grassroots perspective in T4D acknowledging the aims that the host communities have for tourism and their definition of 'development'. Current alternative tourism

models implemented in the Global South have amplified inequalities in the most remote communities. T4D is promoted to ostensibly generate development for a whole community, while protecting the environment; however, the small-scale of sustainable tourism models preclude the involvement of the whole community. Additionally, T4D disregards the livelihood strategies performed in these geographies, and therefore overlooks that for the residents of these spaces, tourism is one of the many economic activities performed to attain livelihoods.

This project studied three cases located in the most touristic region of Mexico, a country that was a world pioneer in T4D. The Mexican government propelled the tourism specialisation of the economy in the Yucatan Peninsula, and fostered an expansion of tourism towards the villages located in the vicinities of world-famous tourist destinations like Cancun, Playa del Carmen and Tulum. However, tourism development generated many negative effects in the region, which have enhanced socio-economic and spatial inequalities. Despite these negative effects, the Mexican Government and multiple tourism facilitators continue to implement T4D initiatives that foster the growth of CBT projects all over the Yucatan Peninsula.

1.3 Situating the research: Tourism for Development in Mexico

Mexico has been a world pioneer in planning and developing tourism since 1969, when the Ministry of Tourism (SECTUR) founded Cancun, its first "Integrally Planned Centre" (IPC), which was developed in 1970 in a desolated area –with only 200 inhabitants– on the northern coast of Quintana Roo, in the Yucatan Peninsula. This tourism centre propelled the creation and growth of other tourist destinations in the Yucatan Peninsula turning the region into the most successful touristed region, not only in Mexico but also in Latin America, given its high influx of international and domestic travellers and touristic economic spill. Cancun's economic success fostered the replication of its "sun and beach" mass tourism model in seven different IPCs in different regions of Mexico to propel development of other economically-depressed geographic areas (FONATUR, 2018b). Nowadays, tourism is the most dynamic sector in the country's economy and in 2019, it generated 8.6% of the country's GDP and created 5.8% of the total jobs (INEGI, 2021). In 2019, Mexico received more than 45 million international visitors, positioning Mexico in 7th place in the UNWTO's International Tourist Arrivals Ranking, surpassing the forecast that UNWTO had established for the country in 2018, which was 43 million tourists (Presidency, 2018, SECTUR, 2019, UNWTO, 2020).

Figure 1-1: The Yucatan Peninsula

Source: INEGI (2018)

However, despite the success of tourism, its neoliberal origin brought many negative consequences to the region: the creation of low-grade jobs with low salaries and poor working conditions increased poverty and inequality, and the rising cost of land has caused spatial segregation of the most vulnerable sectors of society. Additionally, the deregulation of land for tourism expansion generated major environmental damage and destruction of the region's ecosystems that now jeopardizes the continuity of success of the industry (Espinosa-Coria, 2013).

Tourism has failed to create linkages to other economic sectors in the region, and some have been weakened by it, impoverishing the rural areas surrounding tourist destinations (Clancy, 1999, Collins, 1979, Torres and Momsen, 2005b, Torres and Momsen, 2005a, Espinosa-Coria, 2013). There has been a loss of agricultural productivity due to the lack of support for this sector in favour of tourism; and land for agricultural purposes became endangered by urban growth and the development of new tourism amenities (Torres and Momsen, 2005b). This led to an increase in migration from rural to tourist areas, thus transforming the idiosyncrasy and family structure of the Mayan Indigenous groups in the region. The tourist destinations of Cancun and Playa del Carmen for example, have the second highest immigration rate in the country (IMPLAN, 2018, INEGI, 2008). While rural migrants looked for opportunities to increase their income in the tourism destinations (INEGI, 2016a), they only found temporary low-grade jobs, which increased the number of working-poor in the state (SECTUR, 2015b). The constant population growth renders public services and infrastructure insufficient, creating a

fringe of urban poverty at the periphery of the tourist destinations, which is rapidly expanding (Torres and Momsen, 2005b).

National tourism plans have established that tourism needs to be made sustainable, nevertheless the ongoing strategies to achieve this have consisted mainly of expanding the sector by attracting investment for the construction of new tourism amenities in the famous tourist destinations, and the attraction of new international markets for the tourism-related offering (SECTUR, 2018d). These plans have neglected the participation of local entrepreneurs in tourism provision or supply of its ancillary goods and services and forced local populations to accept low-grade jobs in tourism or to migrate to nearby urban centres, which has thus generated negative social and cultural effects in tourist destinations. The national tourism strategy also lacked actions to improve working conditions in the tourism sector, and overlooked resource transferences from tourism to the local population, or to the communities located in the vicinities of tourist destinations (SECTUR, 2018d).

The Mexican Government recognised that sustainable tourism models could tackle poverty of indigenous and rural communities in the country, which propelled the implementation of sustainable tourism models in rural and indigenous communities in Mexico. The National Indigenous Institute [now the National Commission for the Development of the Indigenous People (CDI)] was placed in charge of implementing T4D initiatives. However, the CDI had no expertise in tourism and its efforts remained disconnected from the Ministry of Tourism.

1.3.1 CBT for Development of the Yucatan Peninsula

Several factors fostered the implementation of "alternative" tourism models during the 1980s. These included changes in global market preferences which began to look for authentic "local" experiences while producing a positive impact on the visited places; and the usage of CBT and alternative tourism models by public institutions and NGOs aimed at alleviating poverty in highly marginalised regions (Palomino Villavicencio et al., 2016, Lopez Pardo and Palomino Villavicencio, 2008).

In the case of the Yucatan Peninsula, this began with academics at the Universidad Tecnologica de Felipe Carrillo Puerto in the state of Quintana Roo, who developed a tourism amenity called "interpretative trails" on its campus. This consisted of trails constructed between the mangrove and the rainforest with the purpose of teaching the communities in the Mayan Zone (the south of the state of Quintana Roo) other ways to utilize the rainforest with low environmental impact. The CDI

replicated this tourism amenity in other localities of Mexico as part of their CBT program to alleviate poverty in rural and indigenous regions.

Many of the CBT projects created in the region—and all over Mexico—had a short lifespan, as these projects were not financially viable without external funding due to the intrinsic weaknesses of CBT and a lack of connections to the tourism market. Therefore, as soon as funding was curtailed, many tourism community-based organisations (CBOs) disappeared (Palomino Villavicencio et al., 2016, Gasca Zamora, 2010, Lopez Pardo and Palomino Villavicencio, 2008). Despite these limitations, some tourism CBOs have remained operational since their foundation. Currently, it is evident that the touristification of the Yucatan Peninsula passed from a stage of creation and consolidation of mass tourist destinations, to a phase of boom and expansion of alternative tourism projects developed in the "backyard" of the main tourist destinations (Garcia de Fuentes et al., 2015).

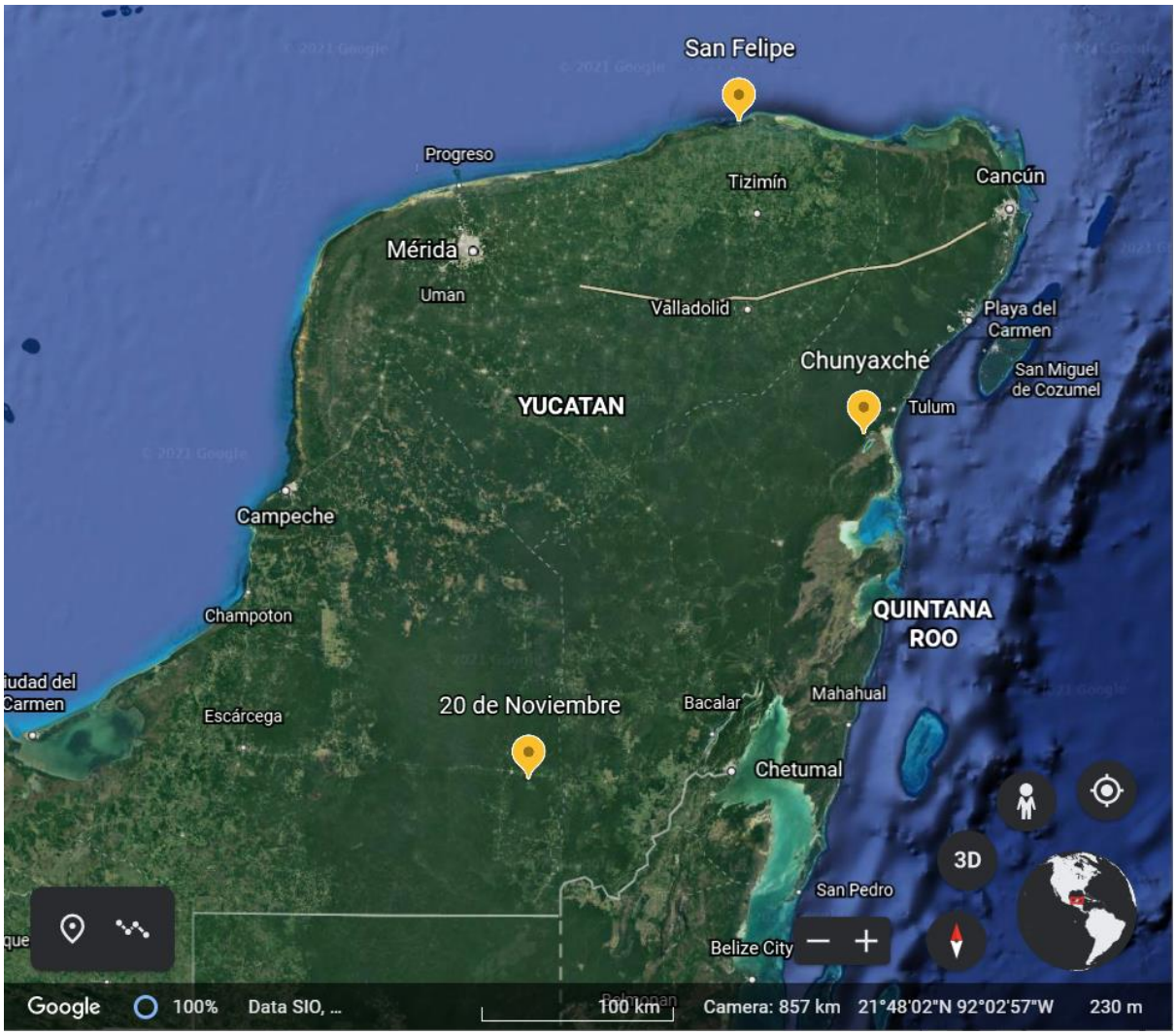
In the Global North, CBT has been promoted as an effective instrument for the development of communities as a whole. However, in the three communities investigated, it was evident that CBT did not have the capacity to generate benefits for their entire populations. However, some communities in the Yucatan Peninsula have adopted CBT as a livelihood strategy for more than two or three decades. Their experiences with CBT, including the challenges and barriers that have prevented most of their populations from engaging directly with tourism, and their perceptions with regard to the benefits obtained through CBT underpin the academic contributions of this doctoral project.

1.4 The case studies

For this project, I researched three different communities located in or around natural protected areas (NPAs) in the Yucatan Peninsula, Mexico. These communities presented different levels of tourism influx and touristic amenities, and have engaged with CBT for over fifteen years. The community of Chunyaxche is located in the State of Quintana Roo and its inhabitants are Mayan speakers. The tourism CBOs in this community provide boat tours in the lagoons of Chunyaxche and in the sea, and received a constant daily influx of tourism all year round. Ejido 20 de Noviembre is located in Campeche State, its inhabitants are also indigenous, but the use of their indigenous language is limited. Their main tourism amenities are artisan workshops, which produce wood, seed and stone-made handcrafts, hammocks and embroidery. They also provide tour guides to the archaeological site of Rio Bec. This community rarely receives visitors. The third researched community is San Felipe, located in the State of Yucatan. This is a coastal community that provides boat tours to different points of interest

for wildlife sightseeing. This community receives an influx of tourists during weekends and peak seasons.

Figure 1-2: Geographical location of the researched communities



Source: Google Earth (Data SIO, 2021)

For the three researched communities, CBT provided an opportunity to diversify their livelihood strategies and increase their income. The need to diversify their economic activities emerged from external shocks that modified or shrunk their livelihood strategy spectrum, reducing their resources. The external shocks in these communities included the creation of natural protected areas (NPA), droughts that affected cattle raising and survival agriculture, and the increase in health risks due to changes in the environment and in regulations related to the main economic activities, such as fishing.

Not all the residents in these communities were able to participate in CBT, as different failures in T4D precluded community participation. However, the members of tourism CBOs implemented solidarity agreements into their tourism-related operations, which aided the adaptation of CBT to their livelihood strategies. Once tourism became consolidated as a livelihood strategy, CBT strengthened their SSE and became a source of jobs with decent work conditions for "their own people", propelling the growth of the popular economy, as more resident individuals were able to provide ancillary and complementary goods and services for CBT. Nevertheless, despite the benefits CBT has had on the communities, these tourism CBOs have had to constantly resist the hardening of regulations from all three levels of the government and the increasing pressure of the predatory private sector that keeps expanding the tourism sector at any environmental and social cost in the Yucatan Peninsula.

1.5 Aim of the research

This thesis provides a critique of T4D and CBT scholarship, as this investigation identifies failures in T4D that preclude tourism to generate development as the communities conceive it. Furthermore, it argues that extant literature does not register such community aspirations. Additionally, this project acknowledges unintended positive effects produced by the adaptation of CBT to the cultures of reciprocity and solidarity of the host communities, gains that are disregarded by academics and practitioners since these do not follow capitalist gains but enable communities to satisfy their needs and legitimate desires. To carry out this critique, I use the lenses of Sustainable Livelihood Strategies (SLS) Theories and the Social and Solidarity Economy (SSE) addressed in Chapter 2, as these theoretical frameworks allow a grassroots perspective of T4D and CBT, currently absent in these bodies of knowledge. These findings have the potential to impact policy and research, as they emphasise the importance of reimagining T4D initiatives with a grassroots perspective. This approach requires the recognition of CLPs, the integration of tourism into communities' livelihood strategies, and the articulation of CBT value chains to engage a broader population in tourism.

To fulfil these aims, this project answers the following research questions:

1. Which unacknowledged benefits emerged from adapting CBT to the reciprocity and solidarity cultures of the host communities?
2. Are there unrecognised barriers in T4D initiatives that inhibit 'development' as defined by the host communities?
3. How have these unrecognised gains of CBT expressed themselves in the communities that embraced tourism?

1.6 Chapter Outline

In Chapter 2, I present the key academic literature that frames this thesis, which has allowed me to analyse the empirical data and answer the research questions. First, I present theories of tourism for the development T4D and CBT, to identify the gaps in this body of knowledge. Then, I underline theoretical perspectives on Sustainable Livelihood Strategies and the SSE to re-signify T4D and CBT as a grassroots movement to produce socio-economic change.

In Chapter 3, I provide the context of this thesis, firstly, by providing a general outline of the history of Tourism for Development in Mexico, with its premier example, Cancun. Then, I depict the trajectory of CBT in the Yucatan Peninsula and provide a detailed description of the three selected communities for this investigation.

In Chapter 4, I explain the designed methodology and outline the rationale behind the methods chosen for data collection. In this section, I describe the process of selecting the communities for this investigation and provide details of the interviewed actors. In this section, I present my reflections on my positionality.

Chapter 5 is the first empirical chapter, where I introduce the different development trajectories of T4D in the researched communities. By examining the different stories of permeation of gains from CBT, I was able to detect the factors that influenced their distribution. These factors included the failures of T4D, as well as internal factors to the communities such as the preservation of their traditional economic activities, forms of organisation of work, and cultural forms of organisation that create exclusion. The gains consisted in the distribution of benefits between members of tourism community-based organisations (T4D), the growth of the popular economy (PE) and integration of CBT value chains and the presence of communities life projects (CLPs).

In chapter 6, I present the identified failures in T4D that lack recognition in the existent literature. These dimensions of failures include the arbitrary selection of the host communities and convenience in CBT imposition; the disjointed efforts among tourism facilitators and other stakeholders; the stringent requisites and regulations established by facilitators that act as barriers for the involvement of the broad community, and inadequacy in capacity building for CBT.

Chapter 7 consist on a taxonomy of unintended and unacknowledged gains that have emanated from the adaptation of CBT to the cultures of reciprocity and solidarity of the host communities. This taxonomy consists of five spheres of gains. The first sphere of gains refers to the increase in psychological, social and information resources that empower communities for the fulfilment of their CLPs. The second sphere of gains consists of the implementation of solidarity values in the tourism

provision and consumption. The third sphere of gains consists of the implementation of solidarity in the process of circulation of resources and gains, in other words, how these reach the broader population. The fourth sphere of gains refers to the implementation of solidarity values in the process of coordinating the local economy, which allows communities to protect their economies from the influence of tourism facilitators and external actors. The fifth sphere of gains consists of the implementation of transversal solidarity principles, which preclude the discrimination of minorities in their participation in the local economies.

In Chapter 8, I present the conclusive remarks of this investigation and the academic contributions derived from the empirical findings herein, and I suggest potential paths for further investigation and practice.

2 Theoretical framework: Gaps in Tourism for Development

2.1 Introduction

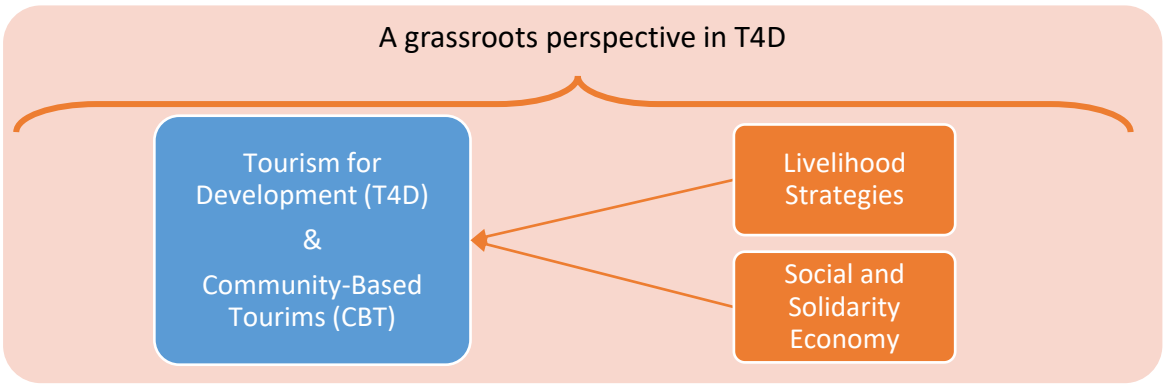
Tourism for development (T4D) scholarship evolved, mirroring mainstream development trends, from promoting international tourism models to boost economic growth in the Global South to promoting sustainable tourism, to develop marginalised and indigenous communities. T4D received widespread praise from academics, practitioners, international organisations, and governments since its inception, as tourism performance was measured following neoliberal development ideals of capital accumulation and economic growth. T4D's success was assessed according to its capacity to diversify economies, attract foreign direct investment, generate foreign exchange earnings, increase gross domestic product (GDP) per capita, its intensive capacity to create jobs, and reduction of poverty, among other macroeconomic metrics. The use of this metrics allowed masking the negative effects that tourism brought to the economic, social, cultural, environmental, and spatial spheres in the geographies where it was implemented. Even within the sustainable development paradigm, T4D consist of top-down community-based tourism (CBT) initiatives that, while aim to help people achieve development, adhere to neoliberal values of capital accumulation, commodification of people, nature and culture, and disregard people's agency to choose the development they wish to attain (Zaoual, 2007). Additionally, mainstream T4D and CBT scholarship overlook the fact that tourism is incapable of engaging whole communities and that these initiatives continue to be highly exclusionary and marginalise the poorest population groups. This has led to an increase of critical scholarship on T4D that analyses tourism primarily via mainstream neoliberal development lenses and lacks a bottom-up approach that investigates tourism from a community perspective. There is a nascent body of literature that analyses CBT project implemented in Brazil centred on the local systems of values that govern the social, economic and environmental relationships of tourism-embracing communities.

This thesis contributes to this incipient body of literature by providing a grassroots perspective on T4D based on the Mexican experience. This is accomplished by applying theoretical lenses from human development and alternatives to development frameworks to analyze to T4D and CBT scholarship. A human development approach uses a pluralist perspective to measure development that surpasses monetary gains, and includes criteria such as life expectancy, literacy, health among other criteria. In human development, the development objective surpassed the accumulation of economic gains as its aim is that people have the capabilities, agency and freedom 'to choose the kinds of lives they have reason to value' (Kuhumba, 2018, Sen, 2000). For this investigation, I used the Sustainable livelihoods strategies (SLS) framework, as this theory analyses the rationale followed by vulnerable households' to achieve livelihoods. SLS enabled situating tourism within the livelihood strategies systems of the

tourism-embracing communities, and helped to identify which factors precluded the participation of economically vulnerable population groups, as well as identifying failures in T4D initiatives that hindered community engagement unrecognised in existent scholarship.

However, human development focuses on the analysis of development at the individual level (people or domestic units) and falls short in envisioning development from a community perspective. Development ideals of individuals and households are deeply situated, as they are shaped and influenced by the societies and spaces they belong to (Zaoual, 2002). Therefore, postcolonial approaches to development such as alternative to development theories, are useful as they embrace diverse situated ontologies on development (Noxolo, 2016). Alternatives to development theories challenge Eurocentric definitions of development imposed on the Global South, that centre on economic growth, accumulation of capital, and increasing consumption. They allow deconstructing and reconstructing the definitions of poverty and wealth, according to specific sites and societies. For this investigation, I used Latin American discussions of the Social and Solidarity Economy (SSE), as it is both a grassroots Latin-American movement and theoretical framework that challenges mainstream development ideas, and promotes economic systems that are centred on the wellbeing of communities. The SSE examines the application of solidarity principles in the economy to meet the needs and legitimate desires of the community's inhabitants. The SSE allowed the identification of overlooked positive effects that emerged from the adaptation of CBT to the communities' cultures of solidarity and reciprocity. These positive gains from CBT are disregarded by academics and practitioners, as they are non-monetizable, but enable tourism-embracing communities to fulfil their collective needs and legitimate desires.

Figure 2-1: Theoretical framework in a grassroots perspective in T4D



Section 2.2 present T4D and CBT scholarship and outlines the gaps in this thesis contributes to in the literature. Section 2.3 approaches theories on SLS, which helped situating tourism and specifically CBT, as a new livelihood strategy in rural and marginalised communities. Section 2.4 draws on the SSE to

inform T4D and CBT, as SSE's guiding principles allowed locating the unrecognised non-monetizable gains from tourism.

2.2 Tourism for development (T4D)

T4D literature is dominated by positivist scientific research that investigates tourism from a business perspective focused on the way tourism is implemented, operated, consumed and the economic benefits it generates (Wilson et al., 2020, Fayos-Sola et al., 2014). This overshadowed the critical discussions of tourism that investigate the negative effects that this so called "clean" sector produces on the host geographies where it is developed (Bianchi, 2018, Duffy, 2015). Initially, T4D focused on mass-consumed international tourism, promoted as the economic panacea for "Third World" countries and it evolved towards alternative tourism models, such as sustainable tourism and community-based tourism (CBT), depicted as a sustainable alternative livelihood strategy for the development of rural and marginalised communities in countries in the Global South. However, the evolution of tourism to more sustainable models has not removed the neoliberal character of the sector, and has transformed it into a driver of capitalist expansion towards uncharted spaces that commodifies nature, wildlife, people and their cultural identities.

The next section tell the story of the introduction of T4D to Global South countries, which begins with the development of international tourism models in Global South counties to foster economic growth.

2.2.1 The rise of international tourism (1960s-1970s)

After World War II, tourism began to grow in Europe and became an engine of economic growth for the western economies. Drawing on these experiences, during the 1970s financial organisations like the World Bank (WB) and the International Monetary Fund (IMF) began to promote tourism as the new panacea for economic growth in developing countries (Hampton and Jeyacheya, 2015, Alvarez, 2014b). Among the benefits advertised were that tourism allowed the diversification of the economy from dependency on traditional exports, generated foreign exchange earnings, was an intensive job creator, attractor of foreign investment, had multiplier effects on other economic sectors, among many others economic gains (Schilcher, 2007, Hampton and Jeyacheya, 2015, Brohman, 1996).

Multinational financial organisations like the WB and he IMF imposed T4D on governments in the Global South by granting conditional loans through Structural Adjustment Programs (SAPs). SAPs imposed free-market policies that fostered the liberalisation of trade and industry, privatization of

state-owned companies and deregulation of the economy or key economic sectors, natural resources and labour (Forster et al., 2019). The implementation of tourism supported reforms aiming at economic liberalisation and a market-oriented economic growth, with the justification that through a trickle-down effect, tourism would bring development to the poorest (Brohman, 1996, Schilcher, 2007). However, the apparently benign touristic sector became a tool of neoliberalist expansion that enabled the entrance of international capitals into unexploited geographies for the usufruct of natural resources and labour offer (Duffy, 2015, Devine, 2013). Schilcher (2007) provides a clear example of how the implementation of tourism in the South Pacific Island States facilitated the entrance of neoliberalism, as the sector was fostered by the de-regulation of land, labour and natural resources to attract foreign investment.

Conversely, Global South countries embraced T4D because of their comparative advantages to develop tourism to other industries and their competitiveness against Global North countries. These comparative advantages were built on a large pool of cheap labour, attractive climates, and a diverse range of natural and cultural resources suitable for developing tourism amenities appealing to the international tourism market (Jenkins, 2015, Bianchi, 2018). Additionally, these countries were newly independent or heavily indebted and required resources to stimulate their economies and/or obtain foreign exchange earnings to comply with their external debt obligations.

For Mexico, it was the economic crisis generated by the collapse of the import-substitution industrialization model operated from the 1940s to the 1970s that impeded the government repaying its foreign debt. To solve this, financiers in charge of BANXICO (the central Bank of Mexico) considered tourism as a solution to increase foreign exchange currency to repay the debt, increase foreign direct investment, balance uneven development, and reduce migration to over-populated industrialized cities (Ambroise, 2015, Brenner and Aguilar, 2002, Clancy, 1999, Litka, 2013, Espinosa-Coria, 2013).

This transformed tourism into the ideal strategy to overcome the economic crisis and generate mass employment. Therefore, in 1971, the Mexican Government obtained a credit of 213 million MXN (Mexican Pesos) from the Inter-American Development Bank (IADB) to propel international tourism in the country, starting with the development of Cancun, Mexico's first Integrally Planned Centre (IPC) (FONATUR, 2018a, Ambroise, 2015).

2.2.2 International tourism failures in the Global South (1980s)

While tourism accelerated economic growth in the Global South, failures in its implementation generated high levels of economic leakages, which reduced the distribution of tourism gains to the host economies, and particularly affected the poorest population groups (Schilcher, 2007, Hampton

et al., 2017). These failures stem from the sector's neoliberal character, as tourism was fuelled by fiscal incentives to attract foreign investment, neglected the integration of local economies into the tourism supply chain, primarily created low-wage jobs, and fostered land, labour and environmental deregulation.

Tourism implementation in the Global South was not straightforward, as foreign investors were not instantly interested in investing in a new economic sector in these geographies (Ambroise, 2015). To attract global capital for the development of tourism amenities, Global South governments offered fiscal incentives, which reduced tax collection and allowed external investors to repatriate their earning (Schilcher, 2007). Reduced tax revenue resulted in decreased public investment in expanding public service infrastructure in tourism cities. Along with the rapid rural-to-urban migration, this resulted in insufficient public services and the formation of peripheral urban poverty fringes within tourist destinations.

Market-oriented reforms disadvantaged local micro, small, and medium-sized enterprises (MSMEs) interested in participating in tourism. These reforms enabled external investors to import goods and services to support their tourism ventures or to bring their suppliers into tourism-embracing geographies. These factors harmed the popular economy, curtailed the emergence of local businesses, and hindered the integration of local enterprises into the tourism supply chain (Alvarez, 2014b, Schilcher, 2007, Espinosa-Coria, 2013).

Labour market deregulation enabled the creation of the majority of blue-collar jobs with little or no social security. While the host populations filled these low-skilled jobs, external investors brought expatriates to fill the few high-skilled jobs created in tourist destinations (Schilcher, 2007). Due to the labour-intensive nature of tourism, the creation of a large number of blue-collar jobs enabled poverty reduction (Croes and Vanegas Sr., 2008, Li et al., 2016, Llorca-Rodríguez et al., 2017). However, the poor working conditions in these low-skilled, low-wage, and long-hours jobs accentuated existing inequalities within tourist destinations and their surrounding communities (Schilcher, 2007).

Land price increase resulted in spatial segregation of the local residents; and land destined for agriculture was jeopardised by urban growth and the construction of new tourism amenities (Lacey and Ilcan, 2015). Additionally, environmental deregulation that fostered tourism development, permitted the destruction of local ecosystems, water pollution, and endangered wildlife (Alvarez, 2014b, Jenkins, 2015).

2.2.3 Tourism for development as a technology of post-colonial rule and westernization

Tourism is a "*technology of postcolonial governmentality*" as through the establishment of guest (tourists) - host (tourism providers) relationships, the operationalisation of tourism activities extended these postcolonial arrangements (Lacey and Ilcan, 2015 p.p. 42). Tourism's neoliberal character facilitated foreign investors' entry into Global South countries for the purpose of exploiting people, land and natural resources to their benefit (Lacey and Ilcan, 2015, Bianchi, 2018). Tourism enabled the replication of colonial engagements in postcolonial states, as tourism has been typically financed through national and international aid and social programs, which have imposed constraints on the behaviour of postcolonial states and their communities by imposing market-oriented mechanisms for addressing social problems like poverty. Tourism facilitators, who are the institutions and organisations that assist, advise and champion T4D initiatives (Romero-Brito et al., 2016), exerted this postcolonial rule, by shaping and commodifying the host communities' environment, culture and livelihoods for tourists' pleasure (Lacey and Ilcan, 2015).

Tourism implementation compelled host communities "westernise," which is the process of adopting ideas and behaviours associated with Western culture rather than preserving native traditions (Devkota et al., 2020). This resulted in the eroding of host communities' traditional cultures as they gradually adopted Western ideas in their social organisation, food, clothing, lifestyle, language, and philosophy, ultimately modifying indigenous culture. Due to the soaring rural to urban migration towards tourist destinations, westernisation affected also the idiosyncrasy of population groups in rural and urban communities adjacent to tourist destinations (Harrison, 2014, Torres and Momsen, 2005a).

The negative effects of tourism extended beyond the economic sphere, as the sector brought many social ills to the populations living in the touristic cities and in their vicinities. These issues include crime, begging, prostitution, displacement from traditional territories, inauthentic representations of culture, loss of traditional cultural practices and rights (Bennett et al., 2012, Bianchi, 2018, Hampton et al., 2017, Jenkins, 2015). Tourism also disempowered the host communities since they were not considered in the planning and development processes of the sector or how tourism would be advertised to the touristic markets, relegating them as witnesses of the usufruct of their territory and culture (Taylor, 2014, Cruz-Coria et al., 2018). Therefore, the way tourism was designed, a sector that facilitated territorial, economic, social and cultural dispossession, was transformed it into a tool of post-colonialism.

2.2.4 Towards a diversification of tourism (1980s)

Despite the negative consequences of tourism, academics, the private sector, and the public sector continued to promote the belief that tourism would drive development by evaluating the sector's performance mainly relying on economic metrics. Globally, tourism success is measured mainly through statistics on tourist arrivals, economic spill-over, employment rates, gross domestic product (GDP), and monetary and non-monetary poverty variables, all of which demonstrated that tourism has a positive macroeconomic impact (Croes and Vanegas Sr., 2008, Li et al., 2016, Llorca-Rodríguez et al., 2017). However, tourism performance does not account for the negatives impacts it has on host communities. Consequences like economic leakage, lack of integration of the local economy into the tourism supply chain, environmental impact, land and cultural dispossession, and the prevalence of social ills in tourist cities were not correlated with tourism.

By ignoring the negative consequences of tourism, policymakers and international financial organisations were able to dismiss criticisms of the sector and avoid implementing strategies to improve the distribution of tourism gains among local populations (Scheyvens, 2007). These strategies would entail acknowledging the poor and the costs associated with this sector's exploitation of local resources, including labour, land, and the environment. This recognition would necessitate strengthening local resource regulations and reducing fiscal incentives to increase governmental revenue, as well as increasing asset transfers to the poorest in the form of land rights, public services, and the development of the local population's human and social capital, all of which would run counter to neoliberal politics (Schilcher, 2007).

Nevertheless, by the end of the 1970s, critiques to tourism rose, driving a shift towards bespoke tourism experiences instead of standardised vacations on tourist destinations, thus fostering the diversification of tourism towards alternative tourism models. Alternative tourism became the new flagship of development as this form of tourism was supposed to directly engage local communities, allowing a fairer distribution of the tourism gains between the host populations while providing the unique experiences to the tourism market. However, alternative tourism models allowed the expansion of neoliberalism to unreached communities and the commodification of nature and culture. These models failed in their aim to bring development to the whole host communities, and in the long term, alternative tourism projects tend to disappear as these rarely achieve the economic objectives established by tourism facilitators, succumbing to market pressures (Lacey and Ilcan, 2015, Hampton and Jeyacheya, 2015).

2.2.5 The alternatives: sustainable and community-based tourism (1980-to date)

By the late 1970s, alternative tourism models began to emerge primarily as a result of three factors: changes in the tourism market's preferences, increased criticism of international tourism's negative effects, and the failure of structural adjustment programmes (SAPs). The first was the growth of a "conscious" tourism market that desired to have a positive impact on the destinations visited and preferred unique experiences over the standardised tourism services provided in mass tourist destinations (Palomino Villavicencio et al., 2016, Lopez Pardo and Palomino Villavicencio, 2008). Secondly, the proliferation of critical studies on the negative effects of international tourism has prompted practitioners and policymakers to refocus tourism development away from mass consumption and toward small-scale alternatives (Bianchi, 2018). Thirdly, following the detrimental effects of SAPs, the IMF and WB advocated for a shift away from market-oriented economic policies toward "targeted micro-level interventions" to alleviate poverty and foster sustainable development in the Global South (Bianchi, 2018).

These factors led to the institutionalization of tourism for development (T4D) policies that aimed to diversify the sector beyond the “sun and beach tourism” destinations, satisfy the new demands of the tourism market and reduce the tourism’s critiques. This led to the proliferation of new tourism models such as ecotourism, sustainable tourism, solidarity tourism, intercultural tourism, proximity tourism, among others (Zaoual, 2007). These policies consisted in the expansion of tourism towards indigenous and rural communities located in the vicinities of tourist destinations for the exploitation of their natural and cultural resources through the creation of new tourism amenities (Palomino Villavicencio et al., 2016, Lopez Pardo and Palomino Villavicencio, 2008). Initially, alternative tourism projects focused in the provision of tourism-related activities carried out in direct contact with nature and the local culture with an attitude of respect, enjoyment and active participation in the protection of natural and cultural resources. Later on, these forms of tourism began to contemplate the need for a responsible consumption in tourism, to minimize the economic, environmental and social effects caused by tourism and the involvement of the local communities in the decision-making processes related to this sector (Jouault, 2011).

By 1982, the concept of sustainable tourism emerged in the Brundtland report, elaborated by the Global Commission of Environment and Development of the United Nations (UN), where sustainable tourism was defined as a model that seeks to fulfil current needs without compromising that future generations satisfy their own need. The World Tourism Organisation (UNWTO) defines sustainable tourism as the type of tourism that acknowledges the current and future impacts in the economic, social and environmental spheres while it still addresses the needs of visitors, the industry, the

environment and the host communities (UNWTO, 2019). The principles of sustainability apply to the sub segments of sustainable tourism such as ecotourism, community-based tourism (CBT), pro-poor or development tourism (UNWTO, 2019).

Nowadays, the WB, IMF and the UNWTO advertise sustainable tourism as the new flagship of development for the apparent multiple benefits it generates; wildlife and environmental conservation, engagement of the host communities in tourism that leads to local development and national economic growth (Duffy, 2015). Because of this argument, the implementation of sustainable tourism models are promoted though different mechanism including the sustainable development goals (SGDs) created by the United Nations (UN). This is specifically addressed in "Goal 8: Decent work and economic growth", in target 8.9 which states that *"By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products"* (UN, 2019).

By emphasizing the need to involve the host communities in tourism development, the term community-based tourism (CBT) emerged and gained popularity amid tourism facilitators, practitioners and academics as it specified the active role of the host community in tourism activities (Jouault, 2011). While some academics characterise CBT as a participatory approach to community development, others define CBT in terms of its potential of distributing and redistributing tourism-related gains among the local population and protecting the local ecosystems (Mayaka et al., 2019, Alvarez-García et al., 2018). Therefore, CBT can be defined as a sustainable tourism model that promotes the engagement of local residents of a community in tourism with the aim to diversify their livelihoods. Practitioners and academics agree that CBT should be community-owned or managed, however the most critical scholars mention that the term CBT should be reserved for tourism projects with a "high degree of community control" and not to those controlled by facilitators (Dodds et al., 2018, Jones, 2005).

2.2.6 Failures and Challenges in CBT implementation

Most of the CBT projects are propelled by facilitators like NGOs and government institutions, which sometimes work in partnerships. Government institutions get involved in CBT implementation for environmental conservation and alleviation of poverty, while for NGOs the main purpose is environmental protection and biodiversity conservation (Palomino Villavicencio et al., 2016, Romero-Brito et al., 2016). In some cases, for NGOs, tourism is part of their strategic plan to gain financial and political support for protection of the environment and wildlife, or to alleviate the impact of natural disasters or external environmental threats like mining or mass-consumed tourism. They also get

involved in CBT to support small-scale tourism ventures initiated by private companies or the local communities; and to control tourism influx towards natural protected areas (NPAs). In some cases, NGOs promote CBT to diversify the livelihood strategies of inhabitants of the host communities to reduce the environmental impact of their traditional economic activities, such as fishing, timber or survival agriculture. In other instances, NGOs aim to increase communities' income sources when their livelihoods shrink due to external shocks, such as the creation of NPAs or major environmental impact from other industries, among others (Romero-Brito et al., 2016).

According to the literature on CBT, tourism facilitators generally retain the leadership in the management of these tourism projects in Global South countries (Jones, 2005, Romero-Brito et al., 2016). This precludes inhabitants of host communities from directing tourism development and operations in ways that are consistent with their social organisation of work, their livelihood strategies, and their culture, and thus prevents them from achieving their life goals. According to Blackstock (2005), CBT implementation takes a functional rather than transformative approach, as it prioritises the industry's long-term economic sustainability over the development of the host community, and thus disempowers the local population to even consider tourism as a livelihood strategy.

Both practitioners and academics argue that CBT can generate benefits for the whole community, as CBT literature depicts communities as homogenous groups that share interests and have similar outcomes for tourism (Blackstock, 2005). However, within these spaces there are power struggles that impede a true democratic decision-making that involves all residents. Additionally, CBT projects are small and do not have the capacity to include the whole population in tourism development. This translates into an increase of socio economic inequality, since the distribution of benefits from CBT is limited only to the people that are directly involved in the tourism activity, which tend to be the wealthiest within each location.

Additionally, the literature ignores the external barriers that impede community participation in tourism planning and development. Tourism facilitators implement T4D initiatives to diversify the livelihoods of inhabitants of marginalised communities. However, in many cases, facilitators tend to retain tourism management, thus reducing community participation to legitimization processes (Blackstock, 2005). Government authorities and the private sector obstruct communities' participation in decision-making processes related to their development, neglecting their involvement and disempowering them on the grounds that collective decision-making and management structures are inefficient (Lacey and Ilcan, 2015, Schilcher, 2007, Dodds et al., 2018, Mitchell and Muckosy, 2008). Therefore, CBT is typically implemented according to the requirements imposed by facilitators to the

communities, and their residents limit to accept tourism in accordance with enforced rules and western methods of work organisation and profit objectives (Scheyvens and Biddulph, 2018).

According to critical scholarship on sustainable tourism, the majority of alternative tourism developments have a short lifespan due to a lack of financial feasibility, collapsing when funding runs out or succumbing to market pressures (Mitchell and Muckosy, 2008). The inability of CBT to sustain itself financially is due to absence of linkages with consolidated tourist destinations or tourism intermediaries such as tour operators and travel agencies. Additionally, CBT projects frequently lack infrastructure and are unable to attract the tourism market due to poor product development, as CBT experiences are designed around community resources rather than market demands (Dodds et al., 2018). Local entrepreneurs frequently abandon tourism once funding disappears, as CBT is financially unsustainable without the support of NGOs and governmental institutions promoting T4D initiatives in marginalised regions (Wang et al., 2016). When CBT projects are commercially successful, they frequently succumb to market and private and public sector pressures, which tend to expand the mass tourism industry into these communities, displacing local entrepreneurs as these cannot compete against big investors (Hampton and Jeyacheya, 2015, Lacey and Ilcan, 2015, Mitchell and Muckosy, 2008).

The examination of the factors that contribute to the failure of CBT projects has spawned a growing body of scholarship that aims to identify strategies for lowering the failure rate of tourism and relocating the leadership of CBT ventures to host communities.

2.2.7 A pathway for CBT's western "success"

In the academic literature, CBT "success" is measured in terms of the achievement of the objectives and goal set by tourism facilitators. These goals are measured in terms of economic gains, conservation of the environment and capacity building in the host communities, and not according to the aims of the inhabitants when they embraced tourism (Romero-Brito et al., 2016, Ndivo and Cantoni, 2016, Mtapuri and Giampiccoli, 2013). Thus, there is a gap in the literature that overlooks unintended benefits from tourism that address the communities' needs and allows them to fulfil their life projects.

According to T4D literature, CBT can have a positive economic impact in the medium term. This was demonstrated in studies conducted in the Pacific Island States, Asia and Latin America where CBT reduced poverty rates and inequality as a result of increases employment rates, economic spill over and increased tourism influx towards the communities (Bartholo et al., 2008, Hampton and Jeyacheya,

2015, Mahadevan et al., 2017). Romero-Brito (2016) indicated that CBT success has also been measured in terms of achieving environmental and "sociocultural" goals as well. Environmental criteria included quantification of support for conservation efforts and resource allocation for wildlife monitoring and environmental education. The sociocultural criterion measured training for capacity building for tourism provision and the development of new infrastructure or services in tourism-embracing communities.

When a CBT project fails, the academic literature normally place the responsibility in the host communities, such as poor marketing and management, lack of quality on the services provided, lack of trust and disorganisation, among others (Romero-Brito et al., 2016). This is exemplified in a case study of CBT development in Ek Balam, a Mayan *ejido* located in the Yucatan Peninsula, where lack of trust and disorganisation decimated its tourism venture. In 2001, the CDI provided funding to the *ejido* of Ek Balam to establish an eco-tourism hotel in the village for visitors to the Ek Balam archaeological site. The CDI delegated project resources and governance to *ejido* members. While the project began with twenty-seven ejidatarios, by 2014, only 11 remained. The reasons for leaving the tourism venture are numerous, including the fact that the economic benefits did not match the amount of work required, allegations of corruption, and unequal distribution of economic benefits from the tourism venture, implying that these were embezzled based on kinship or even religious beliefs (Taylor, 2017, Iturriaga and Rodríguez, 2015).

The literature that depicts a path for CBT's success identifies factors that improves areas such as commercialization, economic spills, and extended lifespan of touristic projects (Dodds et al., 2018, Mitchell and Muckosy, 2008, Romero-Brito et al., 2016, Vajirakachorn, 2011, Alvarez-García et al., 2018, Jouault, 2011). These factors include the increase of community participation in CBT planning, emphasizing the need for an increase of commitment of the population to do participatory planning and definition of roles, rights and responsibilities.

The literature also highlights the need to increase capacity building, as community members involved in the tourism activities will require upskilling in operational and administrative task, leadership, governmentality, among others (Taylor, 2017, Dodds et al., 2018). However, this suggestion normally overlooks the need to improve and refine the traditional economic activities that can be used in tourism such as art and craft production, or developing tours to the agricultural areas to show their livelihoods to the visitors.

Scholars indicate that is necessary that the community stablished and develops links with external actors; government, funding institutions and enterprises from the private sector, since these are enablers of CBT (Wondirad et al., 2020, Giampiccoli and Mtapuri, 2014). These linkages are important

to access to funding for improving infrastructure but also training, and advisory to develop tourism experiences that fit the needs of the market. External actors can also link the community with mass tourist destinations, and the tourism market, which is crucial for commercial success (Mitchell and Muckosy, 2008). However, the literature overlooks the power dynamics between these actors and how the community members could manage these better (Wondirad et al., 2020, Wang et al., 2016).

A key factor for CBT success is that the community has to be in charge of the establishment of goals pursued with tourism as this helps to ensure commitment to sustainability. However, normally, the communities' needs and legitimate desires remain secondary to the objectives established by tourism facilitators that champion environmental and development objectives (Dodds et al., 2018).

Additionally, T4D and CBT literature indicates that local ownership of production factors –land, infrastructure and equipment- is key in ensuring equitable distribution of tourism benefits within the community (Dodds et al., 2018, Romero-Brito et al., 2016). These benefits extend beyond economic gains, and include development of human and social capital among those involved directly in tourism; the increase of jobs and growth of the local economy; and personal gains like leadership and empowerment (Lee and Jan, 2019). Thus, to ensure community empowerment, tourism projects should be managed locally. However, the literature indicates that local management can hinder CBT's development (Mitchell and Muckosy, 2008).

The primary barriers that communities face when implementing CBT projects are lack of resources – financial, infrastructure, knowledge- and potential conflicts between community members and tourism facilitators due to power dynamics (Alvarez-García et al., 2018, Vajirakachorn, 2011). Nevertheless, the literature should address ways of enhance CBT around communities' needs and legitimate desires.

2.2.8 Humanistic critiques of Tourism for Development

The most recent critical scholarship of T4D is unmasking sustainable tourism models such as ecotourism and wildlife tourism as "the neoliberalisation of nature", as these models transform natural resources into "private" properties for the usufruct of external investors and the tourism market (Hannam and Reddy, 2016, Duffy, 2015). NPAs and the creation of wildlife reserves are mechanisms of "privatization" of the existing natural resources. The managers of these areas seek funding from local, government and international organisms for environmental conservation, shifting the way these spaces are valued –in economic terms- from its usage for agricultural land, hunting or

timber for the host populations towards the valuation of living ecosystems for the enjoyment of the touristic market (Duffy, 2014, Hannam and Reddy, 2016).

Sustainable tourism models such as CBT are promoted as a good and green livelihood strategy that supports rural and indigenous communities, when it allows facilitators and external stakeholders profit from the local culture and natural resources (Wearing and Wearing, 2016). Because these communities are normally rural or isolated, their forms of operation are limited and dominated by western models. These enables external stakeholders, like tour operators, to use these locations for their profit, leaving a minimum economic spill over in the community.

Thus, some scholars suggest that it is necessary to decommodify sustainable tourism models, and international tourism, through the implementation of concepts like social justice, wellbeing and dignity into tourism (Jamal, 2019, Jamal and Higham, 2021, Camargo and Vázquez-Maguirre, 2021). The principles of justice can be applied in the distribution of resources to promote equity and into decision-making processes that allow all the actors involved –from inhabitant to private investors and government officials have a say in the way tourism is developed, operationalised and marketed. Justice should contemplate the repair of injustices and harms that the tourism sector enabled to reintegrate the communities in tourism development (Camargo and Vázquez-Maguirre, 2021).

However, these scholars mention that the implementation of justice in tourism is not enough and indicate that tourism should be approached with lenses of humanism that considers the well-being and dignity of the local populations. This approach can enable the host communities to live according to their values instead of the concentration of capitals in few hands (Jamal and Camargo, 2014b, Camargo and Vázquez-Maguirre, 2021)

While this body of literature advances novel ideas in T4D, it continues to promote top-down initiatives, reinforcing the poorest's subordination to tourism facilitators and government institutions and dooms tourism to fail. To close these gaps, T4D projects must not only be centred on the development goals of the inhabitants of tourism-embracing communities, but also take into account the unique characteristics of each site that determine the production and reproduction of social and economic interactions. Therefore, I draw on the incipient body of literature on situated approaches to T4D, using scholarship that studies the Brazilian experience with CBT.

2.2.9 Situated approaches to Community-Based Tourism: Brazil experience

Situated approaches to CBT emerged from the analysis of T4D with theories of site that I address in section 2.4.1. These theoretical lenses indicate that the failure of development initiatives tend to

overlook the complexity, diversity and contingencies of the context that influence and shape the actions of actors regarding to their development (Zaoual, 2007). Therefore it is important to understand that economic realities are social constructs deeply embedded to their specific sites, which are influenced by the site's particular cosmovision, shared beliefs, knowledge and behaviours (Zaoual, 2005). Therefore, to produce lasting economic change, development initiatives need to consider the value systems and representations that prevail in each site and influence economic and social relations.

A situated approach to T4D and CBT requires understanding the motivations, needs and values of the actors involved in the production and consumption of tourism, in other words, residents of tourism-embracing communities and tourists. On one side, residents in tourism-embracing communities desire to participate in tourism without the negative repercussions prevalent in mass tourism destinations, such as economic and social marginalisation of local actors, the destruction of their identity, and environmental damage among others (Nechad, 2019). Thus, in successful situated CBT projects, community mobilisation is crucial for resisting mainstream T4D ideals in their territories and pursuing their own developmental goals. The protection of their territories, land tenure, and natural resources are among these goals. Tourism does not become an element of resistance but it enables communities to make visible the conflicts resulting from the incompatibility between neoliberal and local development values (Bartholo, 2009). On the other side, tourists seek quality tourism services, relationships with the destinations they visit and meaning from their tourism experiences. Tourism is a relational service, and the relationship in tourism is intercultural exchange, which is symbolic before it is monetary (Zaoual, 2007). This exchange highlights the need of tourism governance that includes not only residents of tourism-embracing communities, but also to their visitors. Therefore, a situated approach to T4D is useful as it allows organising the intercultural exchange and ensuring the social and environmental sustainability of each site (Nechad, 2019, Zaoual, 2007).

Recognising that T4D are top-down interventions that disrupt the social and economic realities of tourism-embracing communities, CBT can only be developed if the residents of these sites are subjects and not objects of T4D processes. Considering the latter, tourism facilitators and tourism scholars in Brazil recommended that tourism practice should be centred on the conservation of natural and cultural resources. Additionally, T4D should be committed to the social and economic development of the communities, fostered community participation in all stages of the tourism implementation process and generation of benefits for the residents and ensuring their autonomy in decision-making processes (De Azevedo Irving, 2009). Therefore, innovation of T4D initiatives resulted in the recognition of the shared local knowledge and experience of tourism-embracing communities, and increased the effectiveness of community engagement.

Drawing on the experience of CBT development in in Santa Maria Madalena and in the District of Sana, in the State of Rio de Janeiro, in Prainha do Canto Verde in the State of Ceará and in the Parnaíba Delta, in the State of Piauí, De Azevedo Irving (2009) depicted key pillars of situated T4D. These pillars take into account the culture, values, traditional and local cosmologies as well as the protection of the environment and social spheres of tourism-embracing communities. These pillars include; community engagement and community leadership in planning, implementation and assessment of T4D initiatives; reduced tourism capacity to control social and environmental impacts; direct generation of benefits for the residents of tourism-embracing communities; cultural affirmation and interculturality; and the 'encounter' as an essential condition for tourism (De Azevedo Irving, 2009).

Community engagement and community leadership in planning, implementation and assessment of T4D is key to ensure the long-term social, environmental and economic sustainability of CBT initiatives. This process allows that the local populations make a realistic evaluation of the cost-benefits of their economic diversification through tourism. In addition, community leadership increase the residents' feeling of 'ownership' of CBT and fosters empowerment, democratic governance and social inclusion (De Azevedo Irving, 2009). However, it is important to acknowledge that participatory processes are slow and can include costs not always considering in T4D initiatives.

The pillar of reduced tourism capacity to control social and environmental impacts is essential. Local populations should be in charge on defining the scale of CBT according to their local resources, with the objective to protect their social and environmental spheres. This pillar requires training from tourism facilitators, and according to De Azevedo Irving (2009) requires partnerships with governmental institutions, as without the degradation of the social fabric and the environment would jeopardise the long-term sustainability of CBT.

In terms of the direct generation of benefits for the residents of tourism-embracing communities, is a key requisite of CBT, as in many cases T4D generates social exclusion within communities. Benefits from tourism should not be restricted to the generation of additional income or employment, and should consider improving the wellbeing of the residents of the communities, according to their values (De Azevedo Irving, 2009). In addition, this pillar should include the development of mechanisms that ensure that tourism benefits are not concentrated among the direct participants in CBT. This pillar requires the establishment of forms of evaluating tourism according to the benefits it gives to a whole community.

The pillar of cultural affirmation and interculturality involves appreciating the local culture not only to develop tourism experiences, but it also has to strengthen the local identities and the sense of

belonging to the place (De Azevedo Irving, 2009). This pillar requires that the local population embraces their cultural heritage and, thus it would strengthen the sense of community.

The pillar of 'encounter' as an essential condition requires re-signifying tourism as an exchange between different identities that provides the space for mutual learning and sharing. 'Encounter' requires viewing local communities and tourists as agents, subjects and objects simultaneously (De Azevedo Irving, 2009). This means to see tourism as a gift, that requires giving, receiving and paying (Mauss, 2002), accordingly to the quality of the tourism experience received by the visitor and the host's life quality.

The Brazilian experience suggests that a situated approach to CBT allows fostering long-lasting economic transformation, acknowledging the particular cosmovision of each site, while protecting the social, cultural and environmental spheres of tourism-embracing communities. However, as this body of literature recognises, T4D initiatives can exclude populations groups from tourism. Thus, a sustainable livelihood strategies (SLS) framework, enables an understanding of why only a subset of host community residents embrace tourism, as well as how tourism benefits are distributed within the community.

2.3 The role of livelihood strategies in the stories of inclusion and exclusion in Community-Based Tourism

As seen in the previous section, the academic literature on T4D and CBT describes "community" as homogeneous blocks of population groups and does not recognise power relations between inhabitants of the communities and the different objectives and life projects they pursue. However, these factors render to the inclusion or exclusion in tourism of individuals and population groups within communities. Additionally, T4D initiatives implemented in marginalised and indigenous communities are small-scale and do not have the capacity to include the whole population in tourism development. This translates into an increase of socio economic inequality within the communities where tourism is implemented, since the distribution of benefits from CBT is limited only to the people that are directly involved in the tourism activity, which tend to be the wealthiest and most powerful within each location.

Unfortunately, T4D and CBT literature does not acknowledge the stories of exclusion in tourism, as these foster the idea that tourism is inclusive and capable of bring development to marginalised communities as a whole (Lemas Valencia, 2019). Critical scholarship on T4D reflect on the factors that contribute to the "failure" –as defined by tourism facilitators- of CBT and T4D initiatives, but these

rarely acknowledge that major population groups within the communities are precluded from participating in tourism since the early stages (Lee and Jan, 2019). Therefore, drawing from theories that belong to a human development approach results useful, as this body of knowledge studies the link between people and the development they wish to attain (Kuhumba, 2018). Human development is grounded on the Sen' capabilities approach that focuses on expanding the freedom of individuals to shape their destiny (Nussbaum, 2011). A capability is "a person's ability to do valuable acts or to reach valuable states of being' (Sen, 1993, p.p. 28), in other words, the freedom that individuals have to act in order to achieve survival or achieve a livelihood. It is possible to depict the exclusion of individuals or households from T4D initiatives through sustainable livelihood strategies (SLS) theories, as the model of livelihood strategies under which individuals and households operate define their possibility to diversify their economic activities and income sources.

T4D and CBT scholarship frequently overlook livelihoods strategies shape and constrain individuals and households' diversification options. However, tourism scholars like Tao and Wall (2009) examined the connections between the SLS and tourism, to propose ways to incorporate tourism as an additional economic activity within the livelihood strategies systems, rather than promoting the tourism-centric economy approach that T4D and CBT literature foster. Shen et al. (2008) developed a "Sustainable Livelihoods Framework for Tourism" with the objective to study tourism on a household -or micro- level, instead of the macro level used in T4D and CBT scholarship. This approach analysed how tourism relates to other income-generating activities and suggest that tourism can coexist with other livelihood strategies. Nevertheless, the gap that allows for the exclusion of certain population groups from tourism needs to be covered. This is addressed in section 2.3.3.

In the researched communities, marginalisation and kinship characterises the membership of the community-based organisations (CBOs) working in CBT. Therefore, livelihood strategies theories of marginalised groups allow understand the rationale behind decision-making processes regarding the diversification of economic activities. This sections aims to delineate the role that livelihood strategies models have on the stories of inclusion or exclusion into diversification of the economic activities to include tourism.

2.3.1 Livelihood Strategies of Marginalised groups

Livelihood refers to the capabilities, assets and activities required for means of a living (Rakodi, 1999). The assets are the stock of diverse capitals that conform a household's portfolio of resources that includes natural, physical, financial, human and social capitals, although a diversity of nomenclatures

of resources are presented by different academics (Avila-Foucat and Rodriguez-Robayo, 2018, Bennett et al., 2012, Rakodi, 1999). Desired livelihoods are sustainable, which means that they can cope with and recover from stress and shocks while maintaining or increasing their capabilities and assets, giving the same livelihood opportunities to the young and contributing to other livelihoods in the local level (Tao and Wall, 2009).

To make ends meet or fulfil their needs and desires, households apply different livelihood strategies; for instance, by taking decisions in terms of values, goals and activities to pursue, influenced by the cultural, political, social and economic spheres (Tao and Wall, 2009). In sum, livelihood strategies consist on the storage, accumulation, exchange, reduction or usage of their portfolio of resources to make their living and obtain benefits. However, the livelihood strategies that households apply are constrained by structural conditions that enable household's capabilities to achieve livelihood. By studying poor-urban households in Mexico, Gonzalez de la Rocha (1994c) identified four structural conditions that enable the necessary capabilities for household to achieve livelihood. These conditions are: the possibility to earn wages; labour invested for petty production and petty trade (baking, cooking, sewing, carpentry, bricklaying, and plumbing among others); labour invested in production and services for the household consumption (cooking, laundry, ironing, cleaning, sewing and housing) and; income from social exchange -or the cost of social isolation- with the households' networks of social exchange (NSE) shown in Figure 1.

Figure 2-2: Structural conditions for poor-urban household to achieve livelihoods

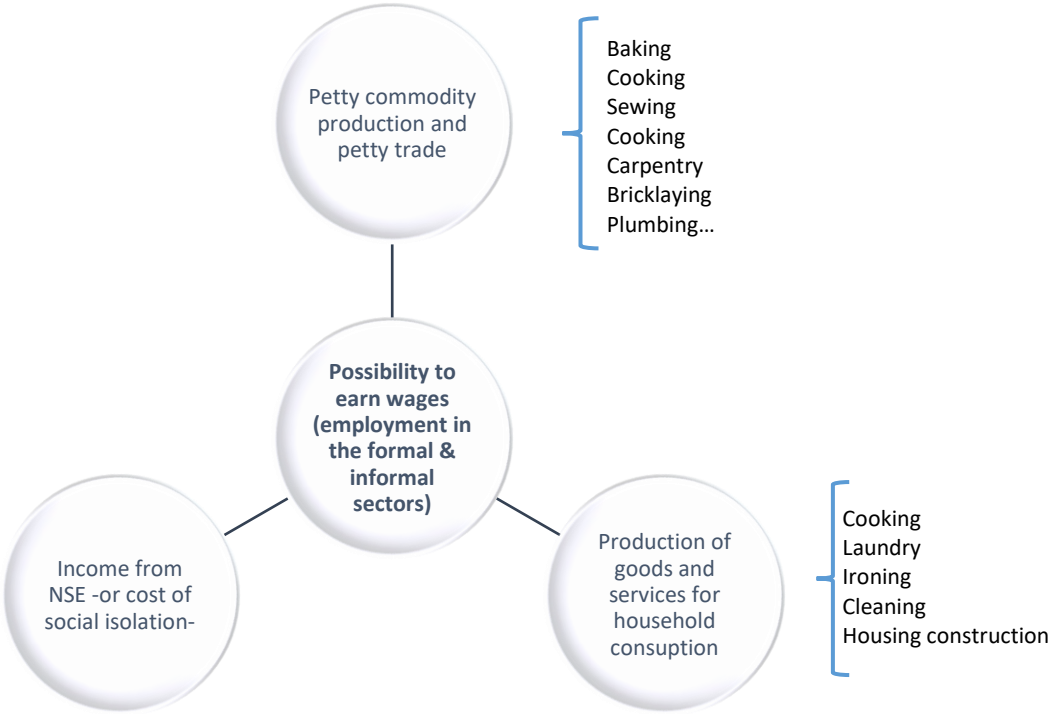


Figure based on Gonzalez de la Rocha 1994, and 2007.

For marginalised households [those excluded from the hegemonic economic system], the income obtained from social exchange through networks is particularly important, as these social structures enable resilience for achieving livelihoods. Through NSE, households access not only financial and monetary resources, but also information, contacts and favours, as well as a substitute of social security –healthcare and pensions- that enable them to achieve survival or improve their livelihoods (Maya Jariego, 2003, González de la Rocha and Escobar Latapí, 2008).

The resources –social capital- found in NSE allows households to manage risks and cope with external shocks and internal stresses, and builds a sense of community that fosters collective action to fulfil common goals (Baird and Gray, 2014, Rockenbauch and Sakdapolrak, 2017). Social capital has three main forms; bonding, bridging and linking social capital. Bonding social capital is built among homogenous groups, with horizontal connections, which share a common identity and have similar objectives (Baird and Gray, 2014, Gannon and Roberts, 2020). Bridging social capital comprises the connections among groups with socio-demographic differences (identity, ethnicity, age, etc.). Linking social capital is a form of bridging social capital, which entails connections among individuals and groups with different levels of authority and power, such as the connections between community associations and government authorities (Onyx and Leonard, 2010). In contrast to bonding capital,

which enables livelihoods, bridging and linking social capital has the potential to alleviate poverty and improve the social structure of the poor by enabling access to external resources and information that can significantly improve their livelihoods. However, some scholars argue that because linking social capital comprise of vertical linkages, can potentially erode marginalised groups' bonding social capital due to power relations (Putnam et al., 1994, Gonzalez de la Rocha, 1994a).

Networks are institutionalised and supported by a common name [family, class, ethnic group, school, neighbourhood, workplace and so on], and occur in the same geographical, social and economic spheres (Bourdieu, 2001). These social structures do not happen naturally, as they are the result of continuous conscious or unconscious, collective or individual efforts, and rites within institutions – being formal or informal groups-. De Lomnitz (1998) provided examples of formal and informal social structures and their rites, developed by residents of a marginalised neighbourhood in Mexico city in the 70s. De Lomnitz offers as instances informal networks established by neighbours, who may or may not be related, in accordance with the institutions of *compadrazgo* (coparenthood) and *cuatismo* (close friendships) (De Lomnitz, 2003a, De Lomnitz, 2003b). *Compadrazgo* and *cuatismo* institutions were founded on geographical and socioeconomic proximity, as well as trust, and aimed to strengthen bonding social capital. In *compadrazgo*, rites consist of imparting a level of respectability on godfathers selected to support not just religious events, such as baptisms and weddings, but also voluntary events such as school graduation ceremonies and even haircuts. Through *compadrazgo*, the godfathers and godchildren acquire the responsibility to support each other (De Lomnitz, 2003b). *Cuatismo*, derived from the Nahuatl 'cuatli', which translate to 'twin brother', refers to set of conventions and values that govern male friendship in the Mexican society. Men categorise their friendships as 'friends', 'closer friends' and '*cuates'* (best friends), and each level of friendship entails different obligations with regard to trusts and favour exchange. *Cuate* obligations include honesty, and providing each other advice, protection and support. *Cuatismo* rituals involve drinking together and buying one another drinks. Aside from these informal institutions, marginalised individuals participated less in formal social structures, but they did join sports teams, unions, and political parties where they strengthen their bridging social capital (De Lomnitz, 2003a).

Collective and individual efforts allow the creation and reproduction of long-lasting relations that enable accumulation and procurement of gains or benefits for the collective or individual enjoyment of the members of the group. Therefore, participation in NSE demands reciprocity, which is the capacity to give, receive and return (Mauss, 2002). In contrast to the market economy, which is built on the maximisation of profits, reciprocity is an exchange of goods and services generated as part of a social relationship based on generosity (De Lomnitz, 2003c). Reciprocity consists of a reciprocal flow of resources and services not limited to single transactions; and that is not governed by the laws of

supply and demand (De Lomnitz, 2003c). However, reciprocity is only possible when there are material, human and financial resources available to "invest" in networks (Thomas et al., 2010). Therefore, the members of a network that cannot afford reciprocity to their group may become socially isolated, lacking access to the collective resources of the NSE.

Members of NSE can generate collective efficacy, which is the social cohesion among neighbours combined with their willingness to intervene on behalf of the common good (Sampson, 1997). Collective efficacy has the potential to foster a bottom-up development as it foster collective action to reduce dependency on external actors, which in this case are tourism facilitators, by strengthening the social fabric (Jørgensen et al., 2020)

A key capability for achieving livelihood, according to Gonzalez de la Rocha (2004, 2007) is the possibility to earn wages, being this employment in either the formal or informal sector. Wages obtained through employment constitute the base income of the household and enable them to invest resources in the other three capabilities; labour invested for petty production and trade; production of goods and services for household consumption, and income from the NSE. During internal or external economic crisis or shocks, livelihood strategies include the intensification of the use of labour by placing more members of the household in the job market. They also increase the petty production and petty trade of commodities and services, as well as the usage of NSE, which is a decisive factor of poor households to overcome scarcity (González De La Rocha, 2006, Gonzalez de la Rocha, 1994b, González De La Rocha, 2007).

Nevertheless, in extended unemployment periods, households have a reduced capacity to respond crisis and shocks. Women and the youngest members of the household become an income-generator factor to compensate the loss of employment of the breadwinner, and have to choose to migrate or participate in illegal or criminal activities to obtain fixed wages that are usually poorly paid (González de la Rocha and Escobar Latapí, 2008). In this cases, the resourcefulness of the poor become insufficient to compensate the detriment of their portfolio of resources, and therefore their capacity to participate in alternative occupations and self-provision activities shrinks. Households are no longer capable to participate in their NSE, as they requires reciprocity -capacity to give, receive and return- socially isolating the household, that altogether leads to a process of cumulative disadvantage (Gonzalez de la Rocha, 1994b, González De La Rocha, 2006, González De La Rocha, 2007, González de la Rocha and Escobar Latapí, 2008).

Although livelihood strategies for rural households present a greater diversity given their access to a broader range of natural resources, the same structural conditions that Gonzalez de la Rocha formulated for poor-urban households apply to poor rural domestic units. Fierros and Avila-Foucat

(2017) did a cluster analysis to characterise the livelihood strategies followed by rural households in Mexico and determined that the main sources of income of these domestic units are wages from agricultural and non-agricultural activities, equivalent to fixed wages; traditional economic activities, agriculture, cattle raising, exploitation of natural resources, and self-employment, comparable to the production of goods and services for self-consumption and petty trade, and; remittances, resources received through their NSE.

This research defined four models of livelihood strategies for rural households; the small producers, agricultural wage-earners, non-agricultural wage-earners and family business owners, shown in Figure 2-3. According to this research, the poorest groups rely on remittances –resources obtained from their NSE– to survive, as these contribute to almost 33% of 'Small Producers' income. However, for the models with highest incomes, remittances lose importance [contributing only with the 16% of the 'Family-business owners' income], while non-agricultural wages and self-employment gain importance, generating altogether 48% of the 'Family-business owners' income (Fierros and Avila-Foucat, 2017).

Figure 2-3: Rural livelihood strategies based on Fierros and Avila-Foucat

Type of household		**Small Producers**	**Agricultural wage-earning**	**Non-agricultural Wage-earning**	**Family business owners**
Yearly income MXN		3,390	19,676	59,521	191,354
Source of income %	Agriculture	5.4	5.2	5.1	20.7
	Cattle raising	7.8	2.2	4.7	7.7
	Use of natural resources	15.8	4.9	3.3	3.1
	Agricultural wages	21.3	**38.5**	18.3	4.5
	Non-agricultural wages	10.4	23.5	**41.0**	**28.6**
	Self-employment	6.7	7.0	10.4	19.7
	Remittances USA & MEX	**32.6**	18.6	17.1	15.7

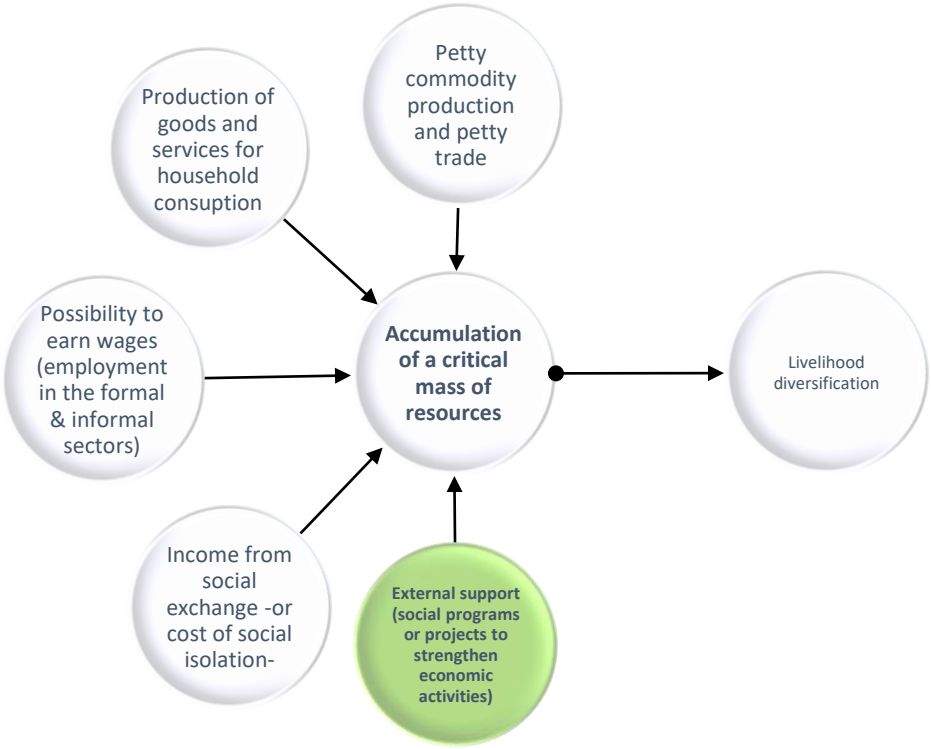
Figure 2-3 demonstrated that only the households with a higher income are able to diversify their livelihood strategies apart from agricultural activities, which would include tourism.

2.3.2 Diversification of Livelihood strategies

Livelihood diversification is the process of diversifying the set of activities that households carry out to respond to opportunities, manage risks and overall strengthen their capabilities to survive or fulfil their needs and desires (Baird and Gray, 2014). While Gonzalez de la Rocha (2001) places fixed wages as the enabler of additional economic activities for survival or achieve livelihood, diversification of livelihood strategies relies on the accumulation of a critical mass of resources. This mass of resources

consists of human resources in the form of labour that is over-exploited by the chronically poor; material resources like property or land; and a minimum of financial resources (Cleaver, 2005, Baird and Gray, 2014). These resources make possible for households to obtain favours from their NSE, however, in case of shocks or stresses, the chronically poor could see diminished this critical mass of resources and operate under a process of cumulative disadvantage. According to Thomas et al. (2010), the State plays a crucial role in enabling and protecting the critical mass of resources through the implementation of social and developmental programs that target marginalised households. Therefore, to enable the diversification of livelihoods, it is necessary to have the structural conditions that enable livelihood, in addition to external support to allow the accumulation of the critical mass of human, material and financial resources, as shown in figure 2.

Figure 2-4: Livelihood diversification framework for households



As seen in Figure 2-3, poor-rural Mexican households diversify their livelihood strategies towards non-agricultural activities, because -except for the family business owners- the parcels of poor-rural households in Mexico -of two hectares or less in average- are insufficient to produce the minimum

food required to survive one year[2]. For small producers and agricultural wage earners, remittances are insufficient to diversify their livelihood strategies. On the contrary, family business owners are the only group capable to diversify their sources of income towards non-agricultural self-employment activities such as craft and food production, and tourism, among many others, that operate in the formal and informal sectors (Fierros and Avila-Foucat, 2017, Avila-Foucat and Rodriguez-Robayo, 2018). Diversification of their economic activities depends on the accumulation of resources, as well as proximity to regional development centres to access the market and; education level -a higher education degree allows individuals to participate in non-agricultural activities. In addition to these factors, diversification towards tourism also relies on the availability of human resources with work experience on tourism activities, and young breadwinners in the households as these are prone to diversify to new livelihood strategies (Avila-Foucat and Rodriguez-Robayo, 2018, Avila, 2018).

2.3.3 Mismatch between Tourism for Development and Sustainable Livelihood Strategies

There is an important mismatch between T4D and SLS literature; T4D overlooks the fact that poor-rural households rely on a diversity of livelihood strategies to survive, and proposes a tourism-centric economic development (Tao and Wall, 2009). These tourism-centric theories and practitioners do not recognises the coexistence and inter-linkages of tourism with other economic activities, that in rural settings are survival traditional activities like agriculture, cattle raising, fishing and timber among others (Tao and Wall, 2009). Tourism not only competes for the same resources utilized in the traditional livelihood strategies, tourism ventures often serve from and affect the traditional economic activities that inhabitants of the communities pursue to achieve a livelihood. Therefore, tourism sustainability competes with livelihoods sustainability that could enable community members to fulfil their needs and desires (Shen et al., 2008).

As seen in subsection 2.3.2, diversification of the livelihoods strategies requires the accumulation of a critical mass of resources, and in T4D, external facilitators enable resources to the communities that strengthen the critical mass of resources that allow touristic diversification. However, the allocation of resources is normally constrained by requirements and regulations that demand the creation of community groups that comply with the conditions established by facilitators. T4D and CBT literature

[2] According to the World Resources Institute, rural people in developing countries had arable permanent cropland averaging 0.3 hectare and permanent pasture of 0.7 hectare per capita in 2005, whereas in developed countries these figures were 1.8 and 3.2 hectare respectively (SHEN, F., HUGHEY, K. F. D. & SIMMONS, D. G. 2008. Connecting the sustainable livelihoods approach and tourism: A review of the literature. *Journal of hospitality and tourism management,* 15**,** 19-31.

and practitioners overlook that in rural and indigenous communities, organisation and usage of resources is community-based, and that those members in chronic poverty excluded from their NSE will not form part of the community groups created to access external resources (Tao and Wall, 2009). This increases the marginalisation of the chronically poor in the community, who remain excluded by the wealthiest members of the communities and external facilitators.

Additionally, tourism operates differently to the traditional livelihood strategies such as agriculture, fishing, cattle raising, among others. In comparison to the mentioned primary activities where the members of the communities are the producers, in tourism, the producers are the facilitators –State, NGOs, and other external actors-. These facilitators decide the way tourism is implemented, rarely hearing the voices of the members of the host communities. Therefore, the inhabitants involved directly in tourism provision become sellers, but their role does not restrict to selling, as their livelihoods strategies often become the main tourism amenity consumed by the tourist market (Shen et al., 2008). Additionally, the interactions between visitors with the inhabitants of the communities shapes and influences their social and cultural environment.

These issues highlight the importance of allowing the communities to manage and control the way tourism is implemented and developed. This is where SLS fall short, as it analyses the actions of individual households to achieve livelihood and ignores that that these decisions are influenced by the system of rules and values that govern the social, economic and environmental relations in each particular geography (Kuhumba, 2018). This demands applying postcolonial approaches to development, such as alternatives to development theories, in order to create situated T4D initiatives that fulfil the communities' development goals (Zaoual, 2002, Radcliffe, 2015, De Azevedo Irving, 2009). The adaptation of tourism to the local cultures of reciprocity and solidarity of indigenous and rural communities could enable the reduction of conflicts between tourism and the livelihood strategies (Tao and Wall, 2009). In addition, implementing tourism models that acknowledge the systems of values of the site that govern the social, environmental and economic relationships in each site would enable the distribution of tourism-related gains among the wider population, including those marginalised from tourism diversification (Tao and Wall, 2009, Shen et al., 2008, De Azevedo Irving, 2009).

Therefore, for this investigation, the lenses of the Social and Solidarity Economy (SSE) are beneficial to illustrate a pathway to adapt CBT to the cultures of reciprocity and solidarity of the researched communities, and to identify the alternative gains that tourism adaptation can generate. The SSE is a theory that operationalises *Buen Vivir*, a good life, which embraces development goals that transcend economic gains, since it recognises development as conceive by the residents of tourism-embracing

communities. The SSE allows the adaptation of tourism to the local cultures of reciprocity and solidarity, which has the potential to yield results that do not correspond to the facilitators' goals, but can strengthen the livelihoods of the community members directly participating in CBT. Although this adaptation of tourism does not target the inclusion of the chronically poor, the SSE reveals mechanism that enable the distribution of tourism-related gains to those marginalised from the T4D and from the NSE of those directly benefitted from T4D initiatives.

2.4 The Social and Solidarity Economy for Community Life Projects

The Social and Solidarity Economy (SSE) is an alternative communitarian response created in the margins of the neoliberal system by those excluded from it, to cope with and offset the marginalisation generated by the implementation of a market economy and the reduction of the welfare State (Dash, 2015). The SSE can be understood as a collective action project created to offset the negative effect of the current system, with the objective to build an alternative economic system that aims to create a just and egalitarian society (Coraggio, 2007).

This alternative consists in the implementation of values like reciprocity and solidarity into the social and economic relations, to fulfil the needs and satisfy the legitimate desires of those who practice it. Coraggio (2011a) defines this aim as "*la reproduccion ampliada de la vida*" (RAV) or the production and reproduction of a broaden life for all its members, which in this thesis will be defined as the pursuit of the "communities' life projects" (CLPs). This term is an adaptation of Blaser's (2010) "life projects", that served to provide an appropriate translation of RAV, as most of Global North's SSE literature equates RAV as enabling individuals, families and communities to live well or improve their wellbeing (North et al., 2020) or reduces RAV to the creation of fair work conditions (Borzaga et al., 2019).

According to Blaser (2010 p.p. 30), the political organisation of Paraguay's Yshiro people –and other indigenous groups- emerges to pursue their "own life projects". The Yshiro engage in development projects understanding them as life projects, and lead them towards their visions of a good life. The concept of a good life is linked and shaped by the communities' cultural, environmental and social spheres as well as their values and beliefs. While the concept of "life projects" suggests a collective construction, to emphasize the collective nature SSE's aim; a RAV, in this dissertation I use the term CLPs.

The purpose of this section is to set the foundations to extend the application of the SSE into T4D, surpassing what tourism scholars have written about Social and Solidarity Tourism Initiatives (SSTI) that investigate the implementation solidarity practices in tourism such as volunteering tourism, the

creation of tourism cooperatives or fair trade tourism (Calvo, 2017). The following subsections lay the groundwork for examining how tourism fostered the implementation of solidarity practices, which eventually extended towards the local economy, and determining whether CBT contributed for the construction of the SSE and the fulfilment of the "communities' life projects" (CLPs).

2.4.1 Situating development: *Buen Vivir*

Economic realities are socially situated constructions. The ruling ontology of each site's society shape the organisation of the local economy, development and informal dynamics (Zaoual, 2002). A site is not just a territory; it is a symbolic place of belonging. Sites are defined by proximity, not only geographical, but also social and cultural (Bartholo, 2009). Therefore, a situated development implies appreciating the culture, the ways of life, traditions and ontologies that govern the social, economic and environmental relations of each sites' communities. (De Azevedo Irving, 2009). The development theory that allows me to acknowledge the ontology of the researched communities is *Buen Vivir*.

Latin American indigenous groups and rural communities have a long history of cooperating to accomplish mutual goals. These forms of cooperation entail reciprocal, solidary, and shared responsibility between individuals and communities for communal needs such as school construction, harvesting, land distribution to families and environmental protection (Calvo, 2017). The study of Andean and Amazonian peoples' ancestral discourses and communitarian practises centred on the pursuit of a good life resulted in the conceptualization of a *Buen Vivir* paradigm (Villalba Eguiluz and Pérez de Mendiguren, 2019, Gonzalez, 2014). *Buen Vivir* or *sumak kawsay* is a living concept, that encompasses the fulfilment of needs; living a dignified and healthy life; loving and being loved; and living in harmony with nature to secure the future of humans and biodiversity (Gudynas, 2016). *Buen Vivir* challenges mainstream development objectives of capital accumulation and commodification of nature and people that can be manipulated, dominated and owned, as this theory emanates from indigenous ontologies where there is no separation between people and nature, and the site is inhabited by humans, living beings, non-living being and spirits (Merino, 2016, Gudynas and Acosta, 2011).

Buen Vivir requires redefining beyond macroeconomic measurements, what is poverty, wealth, and what constitutes a life worth living; opposing primacy of constant consumption; enhancing social relationships; and recognising the significance of nature as a requisite of human life (Lang, 2013). As a platform where diverse ontologies converge to offer alternatives to development, *Buen Vivir* is not restricted to indigenous cosmologies, as long as these promote harmonious relations with oneself,

others, and nature; it embraces plural identities, advocates for social equality, and promotes a post-capitalist logic that favours sustainable production. These objectives align with the SSE's guiding principles, and hence the SSE can provide the economic framework necessary to implement *Buen Vivir* (Villalba Eguiluz and Pérez de Mendiguren, 2019).

2.4.2 Social and Solidarity Economy (SSE), a pathway to *Buen Vivir*

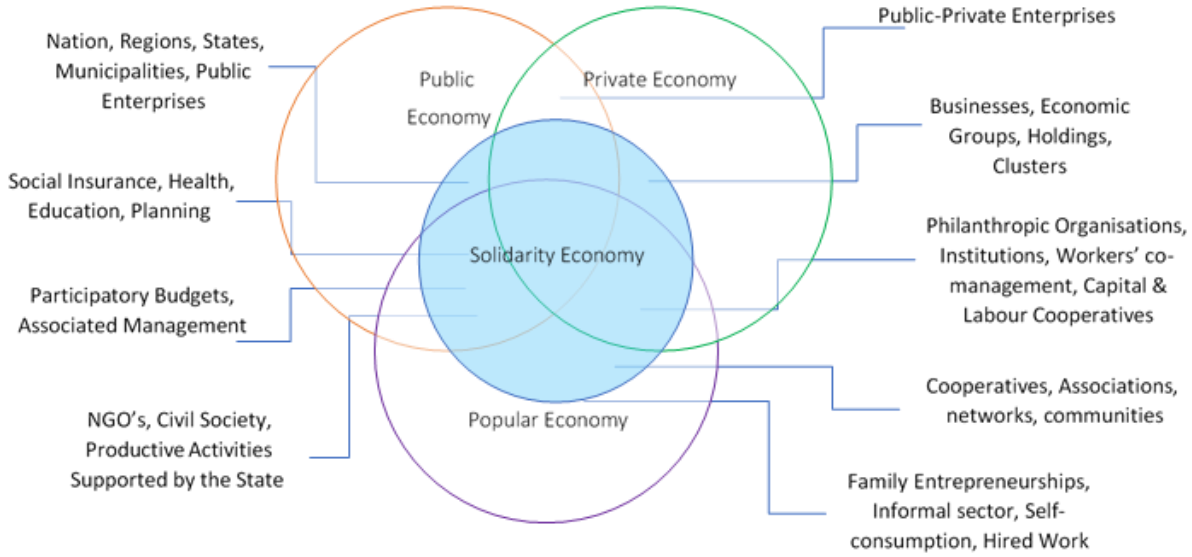
The SSE is a combination of the Social Economy and the Solidarity Economy that Latin-American scholars developed to explain these grassroots socio-economic traditions used by marginalised groups in the Popular Economy to cope and overcome their exclusion from the hegemonic economic system (Kawano, 2013, Poirer, 2014). The SSE is both a theoretical framework and a social movement. Therefore, conceptualise the SSE it is necessary to define first the concepts of Social Economy, -or as it is called by Latin American scholars, '*Economia Popular*' (Popular Economy) and the Solidarity Economy.

Global North academics define the social economy, as the third sector of the economy, which compensates for failures generated by the private and public sectors. The social economy is conceptualized as a sector of self-help and mutual aid, which encompasses collectively organised enterprises that prioritize social purposes over profits (Kawano, 2013, Lewis and Conaty, 2012). Latin American academics use the term Popular Economy (PE), to refer to an economy closer to people; it is the economy of the workers, their families and their communities. The PE's purpose is to compensate for market surplus of labour, redistribute gains, and fulfil CLPs (Gago et al., 2018, Coraggio, 2016b, Quijano, 1970). While the primary capability of PE's members is their labour, they also possess additional resources and have the capacity for wealth production and reproduction; and they combine their efforts for households' consumption, self-labour, waged-labour, communitarian work and participation in their NSE (Coraggio, 2011c).

The PE is comprised by five groups of organisations: emergency solutions (street begging, social assistance programs for alleviation of poverty), illegal activities (petty deft, prostitution, drug dealing); informal individual activities (street trading, domestic services), microenterprises or small family businesses and popular economy organisations like cooperatives (PEOs) (Siqueira Fernandes and Cornélio Diniz, 2018). While the behaviour of the members of this groups is guided by trust and reciprocity, it does not mean their relations are characterised by solidarity, however, this is fertile ground for the growth of the solidarity economy (Siqueira Fernandes and Cornélio Diniz, 2018).

Solidarity is a moral value where the recognition of the other and their protection for an own interest (Coraggio, 2016b). This value implies cooperation, and the investment resources and assuming responsibility for the collectivity, in other words, to be socially co-responsible (Coraggio, 2016b). The solidarity economy seeks to modify the social and economic systems, where development aims to ensure the wellbeing of people and protection of the environment. It is a plural system that integrates the public, private and popular or social sectors and integrates all types of organisations, favouring horizontal –equal- relations (Kawano, 2013, Poirer, 2014, Quijano, 2008). Figure 2-5 illustrates how the solidarity economy places within the three sectors of the economy.

Figure 2-5: Solidarity Economy in the Mixed Economy by Siqueira Fernandes and Cornelio Diniz



Therefore, the SSE is a system of institutions, values and practices given in a specific society to define, mobilise, distribute and organise capabilities and resources to find the best solution to fulfil CLPs (Coraggio, 2015). It is also a collective project that includes strategic and daily practices of transformation and reproduction of the social and economic relations to offset the negative trends generated by the hegemonic economic system, with the objective of creating an alternative economic system that aims to fulfil the needs and legitimate desires of those who practice it (Coraggio, 2015, Coraggio, 2016b).

Different Latin American theorist on the SSE focus on the importance of reciprocity, and collective decision-making processes to fulfil CLPs (Lopez Cordova, 2014, Marañón Pimentel et al., 2013). Coraggio's definition of the SSE focus on social relations as elements of production and re-signifies the concept of collective efficacy, which is useful to analyse if CBT can strengthen the SSE of a community.

2.4.3 The scope of action of the Social and Solidarity Economy (SSE)

The scope of action of the SSE includes the microeconomic, meso-economic, macroeconomic and the systemic levels. In the microeconomic level the SSE acts on individual economic units [that can be mercantile] and domestic units. The members of these organisations cooperate and can be potentially solidary. These organisations can be organised based on kinship, households, functional chaining of organisations and collective associations of organisations or households that together can achieve economies of scale or access broader pools of resources.

In the meso-economic level, the SSE operates over heterogeneous groups potentially complementary and that can create territorial synergies between diverse ethnic communities, this includes social and economic relations between community members and connections between communities. In the macro-economic level, the SSE operates over general and sectorial public policies that integrates the PE with the public and private sectors. At the systemic level, the SSE acts over the system of principles, values, norms, institutions and practices of the whole socio-economic system, that protect the SSE and its aim, the fulfilment of the communities' life projects as well as environmental protection (Puig et al., 2016).

While the SSE operates in these four levels, this investigation focuses on the implementation of the SSE at the microeconomic and meso-economic levels in the studied communities.

2.4.4 The gains: implementation of solidarity practices in the economy

The SSE seeks for the implementation of solidarity into the distribution and redistribution of the means of production, production and the distribution of benefits that come from inputting labour to these resources with social justice (Singer, 2007). This implies that workers own the means of production; the management of the organisation is democratic and the distribution of the income and surplus earnings is made according to criteria approved by the members of the organisation.

To comprehend how the SSE is constructed, it is useful to study how solidarity practices are implemented in the economy. The mere implementation of solidarity values in the economy produces gains as its objective involves the inclusion of the marginalised, seeks non-discrimination, aims to build solidary relations, and fosters social justice access to resources, distribution of labour and gains for the fulfilment of the communities' life projects. The implementation of solidarity in the economy also

contemplates a balanced usage of the natural resources, responsible consumption, and the elimination of intermediaries to avoid leakage of gains.

Coraggio (2011a) developed a theoretical framework that analyses the solidarity principles implemented in the economy's production, distribution and redistribution, circulation, coordination processes, as well as in transversal economic values, which altogether contribute to the SSE's development. To my knowledge, this framework has not yet been operationalised in empirical research. The guiding principles of the SSE are summarised in table 2-6, and in the following paragraphs detail the solidarity practices that are implemented in each economic process.

Figure 2-6: The principles that underpin the Social and Solidarity Economy, adaptation from Coraggio (2011b)

Economic process	Principle of the SSE	Operational factors
Production	**Workers' access to the means of production**	Recovery / ownership of the territory. Universal access to resources for production.
	Work for everyone	Possibility to join the economic activity according capacities. Solidary relations. Autonomy from external actors
	Self-management of the general conditions of the production and the reproduction	Collective ownership and control of infrastructure and operational resources
	Solidary cooperation	Solidary competitiveness. Productive complementarity.
	Access to knowledge for everyone	Incorporation of different forms of knowledge, available for all.
	Socially responsible production	Aiming for consumers' satisfaction, considering environmental protection.
Distribution and redistribution	**Social justice, safeguarding the reproduction and development of the lives of all**	Participation of the poorest groups in the community. Economic activities contribute to CLPs.
	Distribution according needs and labour	Equality in distribution of workload and gains between workers from all the CBOs
	No exploitation of alien labour	Prohibition of slavery, forced labour or salary relationships
	Redistribution	Collective appropriation and distribution of the surplus by a legitimate central authority aiming for social justice
Circulation	**Self-sufficiency**	Social division of work and commerce subjugates to meeting communities' needs and security. Communities develop the capability to satisfy their needs with their own resources, mainly through labour.
	Reciprocity	Symmetric relations of give-receive-return and rejection of asymmetric solidarity (philanthropy)
	Exchange	Regulation of the market for protecting local activities. Reduction of intermediation costs. Strengthening linkages with the market that allows personalisation of relations with consumers.
	Money does not create money	The aim is fulfilling CLPs rather than capital accumulation. Development of social currency.

Coordination	**Community**	Coordination and complementarity according to customs or planned, resulting from free associations and proximity relations
	Regulated market	Establishment of social agreements to control destructive market practices (intermediaries, commodification of labour, nature and money)
	Planning	Democratic coordination of initiatives, planning and control of undesired effects. Joint organisation of activities.
Consumption	**Responsible consumption**	Consumption in balance with nature
Transversal	**Free initiative and socially responsible innovation**	Positive freedom of choice and creation of ventures guided by solidary action
	Diversity / Pluralism	Acceptance of diverse forms of economic organisation and ownership
	Non discrimination	Symmetry in distribution among genders, generations, ethnicities, religions, centre and peripheries.
	Synergy	SSE addresses CLPs. Creation of networks or integration of value chains that include CBOs with the similar or complementary activities.
	Territoriality	Self-Management of the common resources of the community

The economic process of production refers to the transformation of material, natural and human resources –among others- into goods and services. The implementation of solidarity principles and practices in production entail the creation and availability of decent jobs that allow the fulfilment of CLPs. These jobs are desired to allow self-management and independent from external actors that could limit workers' development. Anyone in the community should be able to join a productive activity voluntarily. Workers must have access to the all the forms of knowledge necessary to execute their job that includes information reserved for those that own the capital. When solidarity permeates into the production process, workers own the means pf production, which include the recovery or ownership of the territory or enterprises that are turned into cooperatives, redistribution of land, and access to external resources or subsidies.

Solidarity in production also means solidary cooperation over competition among productive organisation to avoid or eliminate conflict. Solidary cooperation is also visible as productive complementary among organisations or as solidary competitiveness. An example of this is when workers join efforts and resources that are distributed not only among an individual community-based organisation (CBO) but are redistributed between other organisations or networks. This has the objective to maximise profits but, more importantly, to prioritise workers well-being (Safri, 2013).

Self-management in production is desired; this entails that workers have the ownership and control, as well as the collective management of the infrastructure and spaces where production occurs. When solidarity permeates into the production, it becomes socially responsible, which means that the

technologies used for the production process consider the quality of the goods and services produced, to reduce production's impact on the environment and satisfy consumers' needs.

The economic process of distribution and redistribution refers to the way resources and income are allocated between the means of production (labour, land and capital) (Zafirovski, 2000). The implementation of solidarity in this process compels the inclusion of the marginalised of the hegemonic economic system into productive initiatives and the distribution and redistribution of gains obtained with social justice. This includes the inclusion of the chronically poor so they can satisfy their own needs through their own labour or through democratic solidarity. Within the productive initiatives, distribution of workload and gains should be done with equality, according to workers' needs and labour. Solidarity in this process includes veto of slavery or any type of forced labour and precludes the creation of salary relations. In redistribution, the appropriation and distribution of the surplus within each social organisation should be done by a legitimate central authority elected democratically, and this central authority should aim for social justice when using this surplus.

The economic process of circulation regards exchange, and solidarity in this process seeks to ensure that each community can meet its own needs with its own resources, and the social division of labour is used to accomplish this goal. Food sovereignty is an example of self-sufficiency; it occurs when a community can meet its food needs internally. Solidarity in circulation promotes reciprocity in horizontal and equal relationships; this occurs via the NSE or swap markets, and opposes unequal power relations. Solidarity in exchange entails a level playing field in which communities can govern and defend their economic activity by cultural, social, and political means. Fair trade entails the elimination of intermediaries' expenses and promotes direct relationships between producers and consumers. Trade and exchange do not strive to accumulate money in this process, but rather to enhance the social and economic ties between community members.

Coordination of the economy refers to the process of forging social agreements regarding the production, distribution, circulation, and consumption of a particular place or system's resources. Implementing solidarity practises in this economic process entails managing the economy of a whole community or group of communities through democratic efforts and collaborative organisation of economic activities. Solidarity in circulation aims to strengthen the economic activities that take place inside a given territory and to promote their complementarity. By promoting direct relationships between producers and consumers and de-commodification of labour, nature, and money, communities hope to mitigate the impact of unfavourable economic trends or external exploitation.

Consumption is the end of all the economic processes. The implementation of solidarity values in this process refers to fostering a responsible consumption, seeking to reduce or eliminate the negative impact on the environment.

The solidarity transversal values operate in the different economic processes presented previously. These include free initiative and socially responsible innovation; diversity; non-discrimination; synergy and territoriality. Free initiative and socially responsible innovation fosters freedom of choice to create new economic ventures, guided by solidary action instead of competition. Diversity seeks to include diverse forms of organisation of work and ownership. Non-discrimination refers to allow the participation of individuals of different genders, age groups, ethnicities, religions in equality. Synergy aims to foster the complementary of the different economic activities and fosters the creation of networks and articulation of productive chains for the fulfilment of CLPs. Territoriality means the protection of the communities, favouring the self-management of the resources of the territories.

In the studied communities, the initial implementation of solidarity values limited towards those who participated directly in CBT, entailing the economic processes of production, distribution and redistribution, and consumption. However, solidarity practices permeated towards the NSE of those involved directly in CBT, through the processes of distribution and redistribution and circulation of the economy. The later strengthened the local PE and the creation of new community groups and enterprises, that have the potential to redistribute benefits to the chronically poor excluded from the main NSE. This led to the strengthening of the SSE in the researched communities and the fulfilment of CLPs. To the best of my knowledge, to date there are no studies that adopt the SSE to examine CBT. Thus, this study contributes to T4D by using the SSE to analyse if tourism produced alternative gains that do not follow capitalist logic. Additionally, this study contributes to the SSE by using CBT to analyse if a tourism-based SSE is possible, as this sector is generally overlooked by this theory's proponents due to its neoliberal character.

2.5 Conclusion

This chapter shows the gaps of Tourism for development (T4D) and Community-Based Tourism (CBT) and how theories on Livelihood Strategies and the Social and Solidarity Economy (SSE) can inform these. T4D propels the idea that sustainable tourism models implemented in marginalised communities, normally rural and indigenous, can foster development of these territories. While T4D can generate macroeconomic gains, in the long-term these small-scale tourism initiatives disappear as they fail to become financially sustainable. Additionally, critical scholars of T4D and CBT showed

that the alternatives forms of tourism brought negative effects into the communities as tourism became a technology to introduce neoliberalism to unreached geographies, commodified nature, perpetuate colonial relations and extract benefits from the communities.

Critical scholars of T4D determined failures in tourism implementation that allowed the emergence of these negative effects and explains the short life span of tourism ventures, but continued analysing tourism using mainstream development ideals of capital accumulation. However, alternative literature on T4D indicated that to overcome these failures, it was necessary a situated development approach to CBT. This approach requires CBT to be designed according the following pillars: community engagement and community leadership in planning, implementation and assessment of T4D initiatives; reduced tourism capacity to control social and environmental impacts; direct generation of benefits for the residents of tourism-embracing communities; cultural affirmation and interculturality; and the 'encounter' as an essential condition for tourism (De Azevedo Irving, 2009).

However, both critical scholarship on T4D and the situated approaches to CBT fail to explain why the majority of the inhabitants of the tourism-embracing communities are excluded from T4D. To do so, theories on sustainable livelihood strategies depict the structural conditions that allow livelihood diversification, which include participation in NSE and accumulation a critical amount of resources. However, these conditions preclude the participation of the chronically poor, as they are normally excluded from the networks that access the external resources that enables the diversification into tourism. Theories of livelihood strategies shed light into the existing power relations and different livelihood objectives existing between community inhabitants, that T4D and CBT literature ignores, as these study communities as blocks of homogenous individuals.

SLS focuses on the decisions made by individual households and fails to acknowledge that these decisions are shaped according to systems of norms and values shared by the societies inhabiting each site. Therefore, it was necessary to include alternatives to development, like the Social and Solidarity Economy (SSE) to adapt T4D and CBT into the cultures of solidarity and reciprocity prevailing in the researched communities. The application of SSE into the study of CBT and T4D literature allowed identifying overlooked gains generated by CBT, as these mismatch capitalist logic that measure success through economic metrics such as economic spill over, employment rates, or reduction of poverty. These gains include the implementation of solidarity in the economic processes of production, distribution and redistribution and circulation and coordination of the economy. These gains are seen as solving conflict among producers through creating decent job conditions, applying solidary cooperation instead of competing, protecting the environment by fostering responsible production and consumption and distributing and redistributing resources and gains with social justice according

to the needs and labour provided. Gains include the protection of the economic activities of the communities through democratic decision-making and organisation of the local economies. The following chapter discusses the context of this research project and the genesis of T4D in Mexico. It details its evolution from promoting international tourism to promoting sustainable tourism models. Chapter 3 examines a leading example of neoliberal T4D, Cancun, one of Latin America's most popular tourist destinations. Cancun's economic success influenced Mexican T4D public policies, resulting in the touristification of the Yucatan Peninsula, which now features an expansion of sustainable tourism initiatives with both, positive and negative consequences for the region and its inhabitants.

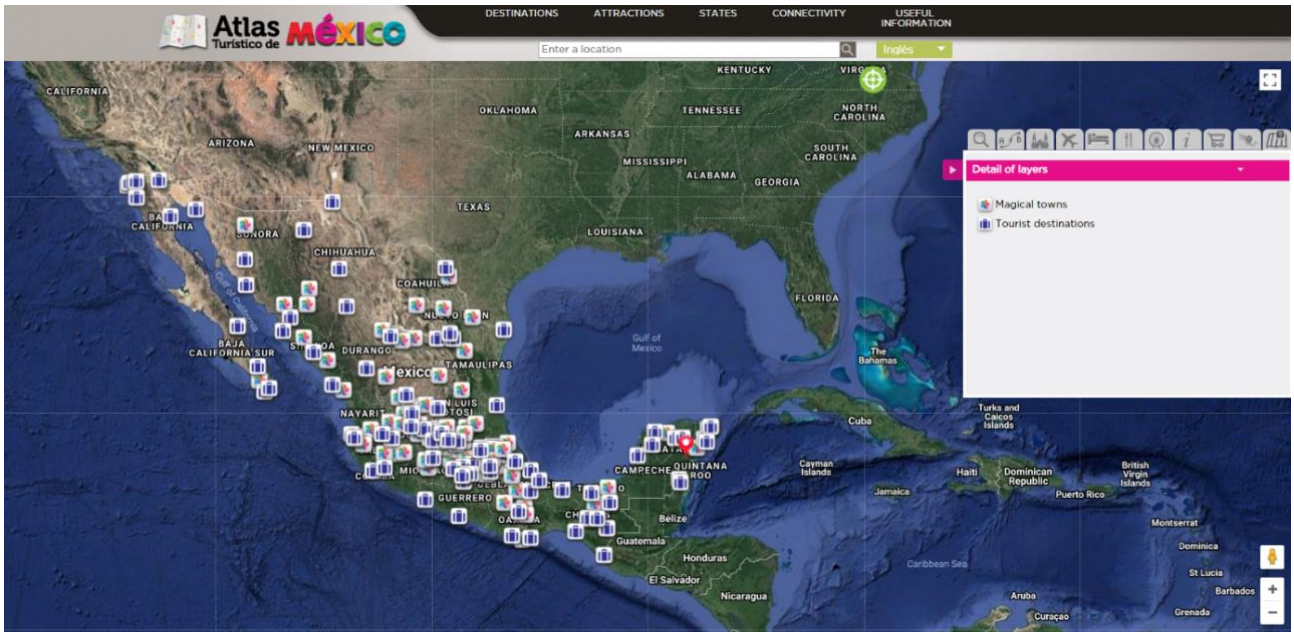
3 Research context: A Mexican tale of Tourism for Development

3.1 Introduction

In this chapter, I describe how the Mexican Government began to propel international tourism in the country, starting with the development of Cancun, Mexico's first Integrally Planned Centre (IPC) (FONATUR, 2018a). The creation and consolidation process of Cancun shaped the way the Mexican Government institutionalized tourism policies for development, which led to the development and consolidation of numerous tourist destinations throughout the Yucatan Peninsula that includes the states of Campeche, Quintana Roo and Yucatan, and all over the country. Due to tourism success, it fostered the development of tourism for development initiatives that fostered the creation of community-based tourism (CBT) ventures to reduce inequality and improve social mobility of poor areas in the country (Ambrosie, 2015, Velazquez, 2018, Clancy, 1999).

For Mexico, tourism has a strategic importance. Nowadays, tourism has a more dynamic growth than the Mexican economy as a whole, and is forecasted that it's sustained growth will continue in the future (WTTC, 2018). The Mexican tourism sector has consistently generated over 8% of the total GDP of the country, and has consistently created over 5% of the remunerated jobs in the country, reaching 5.9% in 2016 (INEGI, 2018b, DATATUR, 2018).

Figure 3-1: Distribution of tourist destinations in Mexico



Source: (SECTUR, 2018a)

As a tourist destination, Mexico offers a great diversity of tourism attractions that include cultural, sport, health, gastronomic, business, sun and sand, and alternative tourism. To date, Mexico has nearly 800 thousand hotel rooms, distributed in 48 tourist destinations. In the country, there are also found 200 natural and protected areas, 111 magic towns developed in rural and indigenous communities, 38 World Heritage locations, 179 archaeological zones and 176 localities of tourism interest (SECTUR, 2018b, DATATUR, 2018, SNIEGT, 2016). The tourism offering is distributed across the country (FONATUR, 2018b). The distribution of these different tourism attractions across the country is shown in figures 3-1 and 3-2.

Figure 3-2: Inventory of tourism attractions in Mexico per region

Touristic Regions	Hotel Rooms	Strategic Tourism Poles	Natural and Protected Areas	Magic Towns	World Heritage	Localities of Interest	Archaeological zones
Centre-North	27,505	3	10	10	1	12	5
Northwest	96,255	5	22	9	6	22	4
Yucatan Peninsula	**122,645**	**6**	**26**	**6**	**5**	**15**	**50**
Pacific Coast	81,845	5	34	10	3	15	31
North	27,060	2	16	4	1	8	6
Centre	150,227	8	36	32	11	33	48
Northeast	60,425	4	15	10	0	12	4
West	166,365	9	35	23	9	48	16
Gulf Coast	62,254	6	6	7	2	11	15
Total	**794,581**	**48**	**200**	**111**	**38**	**176**	**179**

Sources: (SECTUR, 2018b, DATATUR, 2018, SNIEGT, 2016)

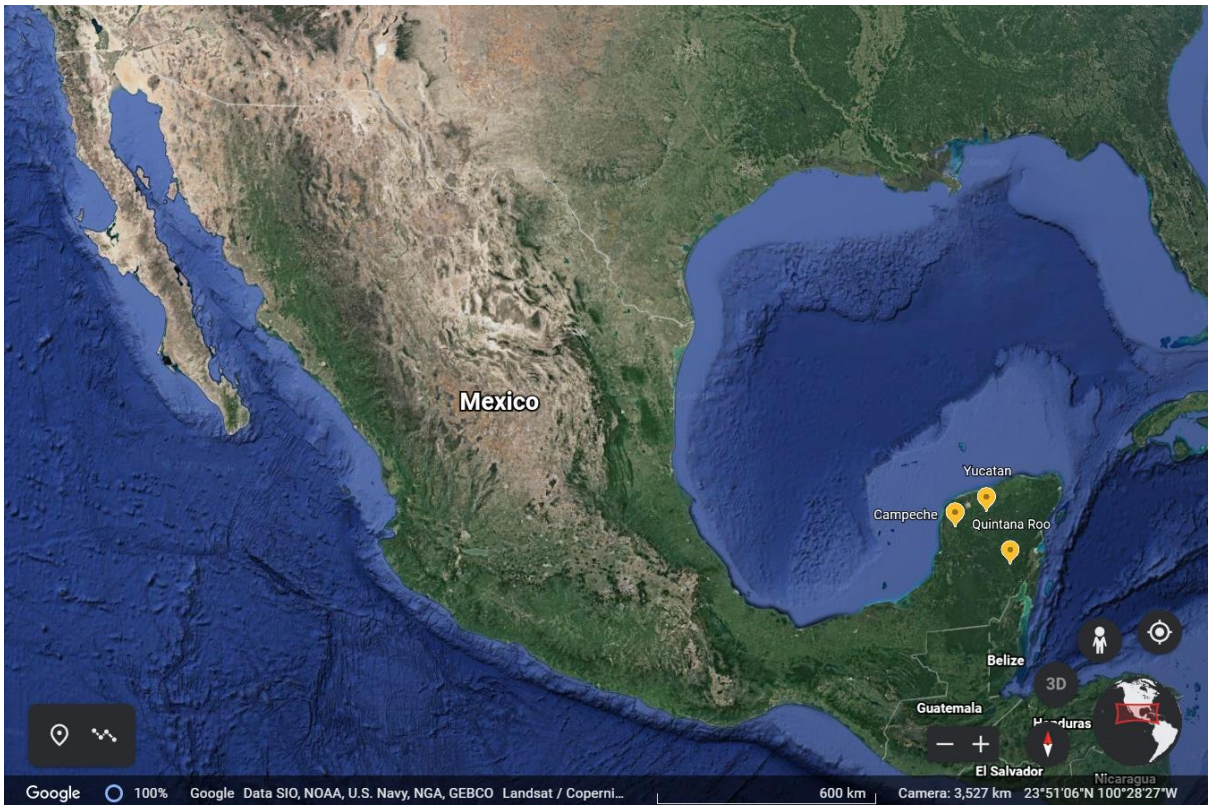
To contextualise the significance of the tourism sector in the Yucatan Peninsula I first depict a brief characterisation of the region. In section 3.2, I analyse Cancun case as the premier example of neoliberal tourism for development (T4D) in Mexico. Cancun's success guided he institutionalisation of T4D policies in the country, which I detail in section 3.4. Section 3.5 describes the implementation of T4D that fostered the implementation of community-based tourism (CBT) in the Yucatan Peninsula. Finally, section 3.6 present the concluding remarks for this chapter.

3.2 Brief characterisation of the Yucatan Peninsula

The Yucatan Peninsula is located at the Southeast of Mexico. It is conformed by the states of Campeche, Quintana Roo and Yucatan, which sum a total of 14.1 million hectares and represent the 7.2% of the national continental territory (SNIGF, 2018a, SNIGF, 2018b). The state of Campeche adjoins to the northeast with the state of Yucatan; to the east with the state of Quintana Roo; to the southeast with Belize; to the south with Guatemala; to the southwest with Tabasco and to the west

with the Gulf of Mexico. Quintana Roo borders to the north with Yucatan and the Gulf of Mexico, to the east with the Caribbean Sea, to the south with Belize and to the west with Campeche. Yucatan adjoins to the north with the Gulf of Mexico, to the southeast with Quintana Roo and to the southwest with the state of Campeche (SNIGF, 2018b).

Figure 3-3: The Yucatan Peninsula, Mexico



Source: Map obtained from https://earth.google.com/web/@19.99757347,-89.2526594,145.01410084a,275721.9266995d,30y,0h,0t,0r/data=MicKJQojCiExR1VhM2o3VGlsZ3RhS3RpZ0tIOFg5ZzNsa2VxbnZPbGY

Tropical rainforest covers nearly 70% of the region's forest surface, accounting for more than 30% of the country's total forest cover. Mangroves cover nearly 3.0 % of the Yucatan Peninsula's surface (SNIGF, 2018b). Although the Yucatan Peninsula lacks visible rivers, it is abundant in underground rivers, cenotes (deep pools), and low areas known as *aguadas*, all of which contribute to the region's tourism potential.

As illustrated in Figure 3-4, more than half of the Yucatan Peninsula's territory -7.9 million hectares - is comprised of *Ejido* lands (SNIGF, 2018a, SNIGF, 2018b). *Ejidos* are a mechanism of restitution of land to indigenous and rural communities for their collective ownership and usufruct, a result of the Mexican Revolution (1910-1917) and the Agrarian Reform (SNIGF, 2018b, Mallen Rivera, 2017, Flores

Rodriguez, 2008). The land restored to these communities has three main destinations: land for human settlement and communal development; land for common use that is not used for human settlement but is not parcel land; and parcel land, which is land distributed among community members and can be used individually or communally (Mallen Rivera, 2017). By law, 'owners' of *ejidos* cannot be dispossessed of their land, and they can inherited it to their kinship. However, as a consequence of agrarian reforms implemented during President Carlos Salinas de Gortari's (1988-1994) administration in the 1990s, some communities lost parts of their territories. These dispossessions enabled the government to establish natural protected areas (NPAs) and grant concessions to private companies for land exploitation (Flores Rodriguez, 2008, Lopez Pardo and Palomino Villavicencio, 2008, Gasca Zamora, 2010, Palomino Villavicencio et al., 2016).

Figure 3-4: Ejidos of the Yucatan Peninsula

State	Continental Surface		Registered Ejidos	
	Hectares	%	Hectares	%
Campeche	5,727,716	2.9%	3,000,984	3.6%
Quintana Roo	4,455,627	2.3%	2,758,241	3.3%
Yucatan	3,953,702	2.0%	2,190,238	2.7%
Yucatan Peninsula	**14,137,045**	**7.2%**	**7,949,463**	**9.6%**
National Territory	**196,718,300**	**100.0%**	**82,408,563**	**41.9%**

Sources: (SNIGF, 2018a, SNIGF, 2018b)

Nearly 30% of the Yucatan Peninsula's forest surface is classified as "perturbed area," indicating areas that have suffered significant degradation due to land clearing, grazing, or forest fires (INEGI, 2017). This led to establishment of NPAs throughout the Peninsula, which now encompass 9.5 million hectares that are 67% of the region's surface, or more than 9.5 million hectares (CONANP, 2018b, CONANP, 2018a, SNIGF, 2018b). Many of these NPAs have become part of the tourism natural amenities that attract visitors from all over the world. Figure 3-5 provides and inventory of the regions NPAs.

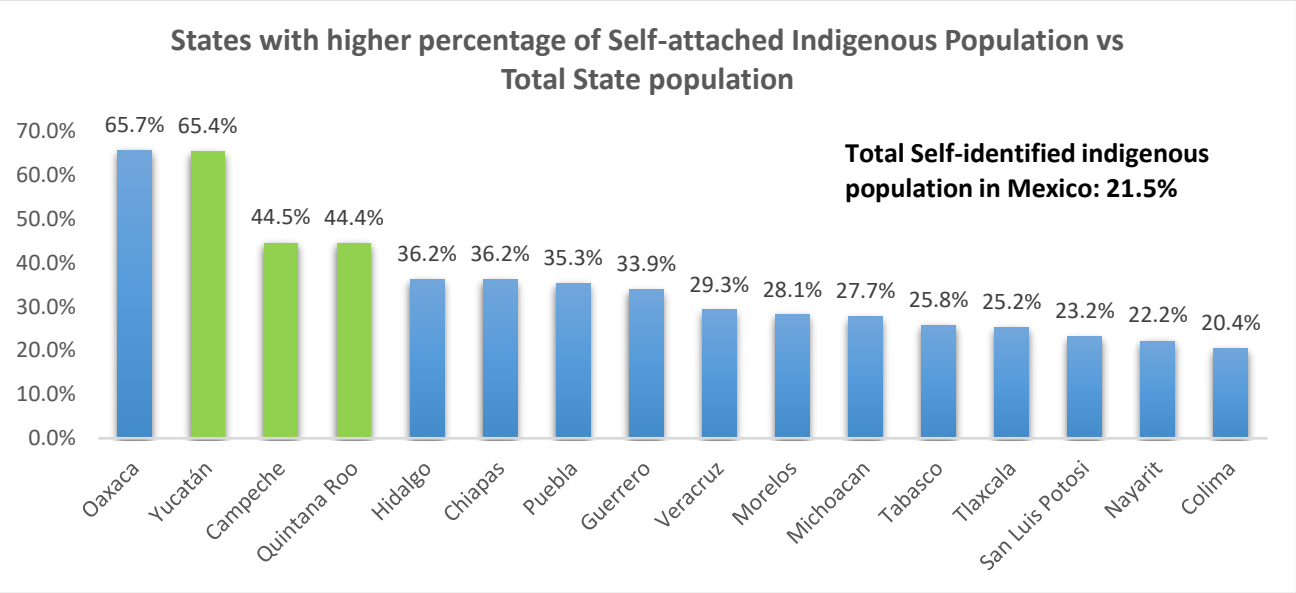
According to demographic indicators, the Yucatan Peninsula is home to 4.7 million people, or 3.8% of Mexico's total population (INEGI, 2015, INEGI, 2017). More than 54% of the total population of the Peninsula self-identifies as indigenous, which is significantly higher than the national average of 21.5%. Yucatan, Campeche, and Quintana Roo are respectively, the country's second, third, and fourth most self-identified indigenous states. 65.4% of the population in Yucatan, 44.5% of the population in Campeche, and 44.4% of the population in Quintana Roo identify as indigenous (INEGI, 2015, INEGI, 2017, CDI, 2015). Figure 3-6 shows a comparison of self-identified indigenous population per state.

Figure 3-5: Inventory of NPAs in the Yucatan Peninsula

Name	Management Category	States	Surface (ha)	Decree Date
Tulum	National Park	Quintana Roo	664.32	23/04/81
Sian Ka'an	Biosphere Reserve	Quintana Roo	528,147.67	20/01/86
Adyacent Beach to Lagartos River	Sanctuary	Yucatán	606.40	29/10/86
Beach of Contoy Island	Sanctuary	Quintana Roo	10.21	29/10/86
Dzibilchantun	National Park	Yucatán	539.44	14/04/87
Calakmul	Biosphere Reserve	Campeche	723,185.13	23/05/89
Swamps of Centla	Biosphere Reserve	Tabasco y Campeche	302,706.63	06/08/92
Alacranes Reefs	National Park	Yucatán	333,768.51	06/06/94
Lagoon of Terminos	Flora and fauna protection area	Campeche y Tabasco	706,147.67	06/06/94
Yum Balam	Flora and fauna protection area	Quintana Roo	154,052.25	06/06/94
Uaymil	Flora and fauna protection area	Quintana Roo	89,118.15	17/11/94
Reefs of Cozumel	National Park	Quintana Roo	11,987.88	19/07/96
Chinchorro Bank	Biosphere Reserve	Quintana Roo	144,360.00	19/07/96
Western Coast of Isla Mujeres, Punta Cancun & Punta Nizuc	National Park	Quintana Roo	8,673.06	19/07/96
Reefs of Puerto Morelos	National Park	Quintana Roo	9,066.63	02/02/98
Reefs of Sian Ka'an	Biosphere Reserve	Quintana Roo	34,927.16	02/02/98
Contoy Island	National Park	Quintana Roo	5,126.26	02/02/98
Ria Lagartos	Biosphere Reserve	Yucatán y Quintana Roo	60,347.83	21/05/99
Los Petenes	Biosphere Reserve	Campeche	282,857.63	24/05/99
Reefs of Xcalak	National Park	Quintana Roo	17,949.46	27/11/00
Ria Celestun	Biosphere Reserve	Campeche y Yucatán	81,482.33	27/11/00
Otoch Ma'ax Yetel Kooh	Flora and fauna protection area	Quintana Roo	5,367.42	05/06/02
Bala'an K'aax	Flora and fauna protection area	Quintana Roo, Yucatán y Campeche	128,390.16	03/05/05
Mangroves of Nichupte	Flora and fauna protection area	Quintana Roo	4,257.50	26/02/08
Whale Shark	Biosphere Reserve	Quintana Roo	145,988.14	05/06/09
North & Eastern coast, terrestrial and marine stripes of Cozumel Island	Flora and fauna protection area	Quintana Roo	37,829.17	25/09/12
Mexican Caribbean	Biosphere Reserve	Quintana Roo	5,754,055.36	07/12/16

Source: Made by the author with information of CONANP (2018b, 2018a)

Figure 3-6: Self-identified Indigenous Population per State



Source: Made by the author with information from CDI and INEGI (2015, 2015)

The Mayans are the Yucatan Peninsula's dominant indigenous group. Campeche is home to a diverse range of indigenous groups; however, 85 % of the indigenous population is Mayan. In Quintana Roo, 93.9% of the indigenous inhabitants are Mayan as well as almost 100% of the indigenous inhabitants of Yucatan (CDI, 2018b, CDI, 2018a).

Of the total 126 municipalities of the Yucatan Peninsula, 99 are indigenous municipalities inhabited by the 32% of the population of the region. Following the national trend, in the Yucatan Peninsula indigenous municipalities present higher marginalisation indexes than on municipalities with lower presence of indigenous population groups. In the case of indigenous municipalities in this region, 34.3% of them present high and very high marginalisation indexes (CDI, 2015, INEGI, 2015, INEGI, 2017).

The Yucatan Peninsula accounts for 6.5% of the country's gross domestic product (GDP). Campeche is a state that is heavily reliant on the extractive industry and is abundant in oilfields, accounting for 3.5% of the national GDP in 2017. Quintana Roo contributed 1.5% to the national GDP, with 90% coming from the tourism sector (INEGI, 2018a). Yucatan generated 1.4% of the national GDP and demonstrated a more diversified economy, as the state's GDP is generated by twenty-one economic sectors. The primary economic sectors in Yucatan are commerce, manufacturing, real estate, and construction (INEGI, 2016b, INEGI, 2018a).

3.3 Cancun: the neoliberal tale of tourism for development

The Mexican Government became a world pioneer in tourism for development since 1969 and currently tourism is one of the most dynamic sectors of the economy of the country. Institutional discourse related to the development of tourism in Mexico is surrounded by myths that tell that tourism development policies had immediate success. However, it is important to clarify the origin of this sector since it shaped the way tourism policies for development are implemented to date (Brenner and Aguilar, 2002, Ambroise, 2015).

Prior the 60s, tourism was concentrated in Mexico City and few beaches such as Acapulco, Puerto Vallarta and Cozumel and the foreign currency earnings of this industry were not accounted in the Balance of Payments (Ambroise, 2015, Litka, 2013, Brenner and Aguilar, 2002). Mexican President Miguel Aleman Valdes is considered the "father" of the Mexican tourism sector. During his presidency (1946-1952) and as the General Director of the National Tourism Commission Board (1958-1983) developed strategic plans to channel investment and promotion to Acapulco, where he was an investor. However, it was until the economic crisis generated by the collapse of the import-substitution industrialization model (40s-70s), that impeded the government repaying the foreign debt, made financiers of BANXICO (the central Bank of Mexico) to consider expand the tourism sector to solve the debt crisis.

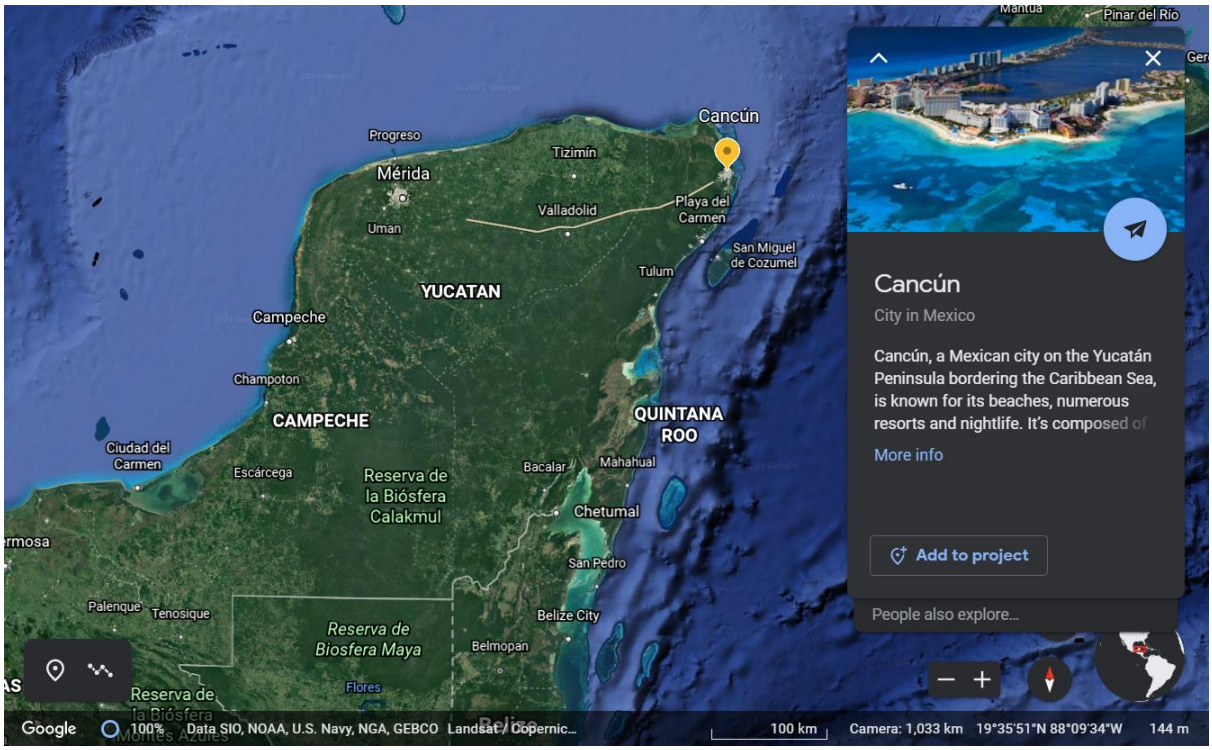
Bank of Mexico (BANXICO), Mexico's central bank is responsible for managing the country's foreign exchange, money supply, and interest rates in order to maintain macroeconomic stability, but in 1960s, it was also responsible for the country's economic development along with the Ministry of Treasury. While Treasury's politicians focused on job creation strategies, BANXICO's financiers were interested in raising foreign exchange currency to repay debt, increase foreign direct investment, balance uneven development, and reduce migration to overpopulated industrialised cities. As a result, financiers saw tourism as an ideal strategy for overcoming the economic crisis and achieving the objectives of both politicians and BANXICO (Ambroise, 2015, Brenner and Aguilar, 2002, Clancy, 1999, Litka, 2013, Espinosa-Coria, 2013).

To propel tourism development, BANXICO conducted a study along the country's seashore to identify potential luxury destinations for foreign tourists with a high purchasing power. From twenty-five identified locations, the list was narrowed to five: Loreto, Los Cabos, Huatulco, Ixtapa, and Cancun (Ambroise, 2015, Brenner and Aguilar, 2002, Clancy, 1999).

After a detailed evaluation of the list, Cancun -located in the northern region of Quintana Roo as seen in figure 3-7- was selected as the first Integrally Planned Centre (IPC) in 1970 (FONATUR,

2018a) due to different factors. First, the dispersal of American citizens from Cuba to the Caribbean Islands and Florida, which rely heavily on tourism, was seen as an opportunity to capture a portion of this exodus due to Cancun's geographical location. Cancun had the potential to reactivate the Yucatan Peninsula's economic depression caused by the decline of the henequen industry and chewing gum demand, which were the main agricultural activity in the Yucatan Peninsula. Cancun was a barren area, with only 200 inhabitants, and this represented few legal impediments in terms of dispossession of land titles and population displacement (Ambroise, 2015, Brenner and Aguilar, 2002, FONATUR, 2018a).

Figure 3-7: Cancun and the Yucatan Peninsula



Source: Map obtained from: https://earth.google.com/web/search/Canc%c3%ban,+Quintana+Roo,+Mexico/@19.59751063,-88.15964207,143.79742826a,1032583.7115933d,35y,-0h,0t,0r/data=CnIaSBJCCiUweDhmNGMyYjA1YWVmNjUzZGI6MHhjZTMyYjczYzYyNWZjZDhhGfX1fM1yKTVAIWuI4G5_tlXAKgdDYW5jw7puGAIgASImCiQJvB082Gg5NUARrpPnqp4ENUAZl11-wvmlVcAhzdM66bnGVcA

To convince the Presidency and the Ministry of Treasury of the viability of tourism for development, BANXICO developed a discourse emphasising how this sector could improve the population's well-being through economic growth and job creation. BANXICO planned to launch Cancun on November 30th, 1972, with 750 rooms and a 44% hotel occupancy rate. Additionally,

they forecasted that the initial construction of 1,000 hotel rooms would generate nearly 12,000 jobs in construction, service, and commerce, and that once hotels were operational, job opportunities would raise. Additionally, they estimated that the industry would generate a multiplier effect of 6.5 per dollar spent by tourists in the agriculture, commerce, and services sectors (Brenner and Aguilar, 2002, Ambroise, 2015, Marti, 2017).

In 1969, the Ministry of Treasury established INFRATUR (Trust for the Promotion of Tourism Infrastructure) –now FONATUR (National Trust for Tourism Promotion) – for designing, developing, and advertising new tourist destinations and improving existing ones. To develop Cancun, BANXICO and the Mexican government agreed to develop the public infrastructure concurrently as private investors would carry out the construction of hotels and other tourism amenities (Marti, 2017, Ambroise, 2015). This would require meticulous coordination of public and private investment, as well as negotiations with airlines to ensure that operations begin on time. With an operating budget that enabled INFRATUR to acquire or expropriate land, a land grant of 7,341 hectares, private investment, and a loan from the Inter-American Development Bank (IADB), financiers began the infrastructure construction and the search for investors for the hotel construction (Ambroise, 2015, Brenner and Aguilar, 2002, Marti, 2017).

By 1973, none of the hoteliers had committed to investing in Cancun and to ensure Cancun destination's inauguration in November 1974, INFRATUR devised three financial strategies. First, to reduce land prices, and offered a 20% discount to the investors that started operations prior to the new inauguration date. Second, the creation of 'land-for-shares swaps' to attract financiers interested in investing but lacked tourism experience. In this case, INFRATUR would select the land, designed the hotel and initiate the construction in exchange of shares. Third, INFRATUR acted as an investor in superstructure, where it offered hotel operations to international hotel chains while maintaining ownership of the land and building (Brenner and Aguilar, 2002, Ambroise, 2015, Marti, 2017).

Since the vast majority of the land was sold on credit and many of the hotels were financed through government risk-free loans or the Trust for the Guarantee and Promotion of Tourism (FOGATUR), Cancun project lacked the necessary cash flow to pay contractors and IADB's loan. The latter augmented the current account deficit, requiring the intervention of the Ministry of Treasury in order to meet these obligations. In 1974, INFRATUR and FOGATUR merged to form FONATUR, which was incorporated into the Ministry of Tourism (Ambroise, 2015, Brenner and Aguilar, 2002, Clancy, 1999).

International hotel chains did not invest directly in Cancun until 1980, and it was during this decade that Cancun finally surpassed its forecast in terms of hotel rooms, occupancy rates, tourist influx, creation of jobs and economic growth (Brenner and Aguilar, 2002). The tourism sector in Cancun continued to growth and this fostered the establishment of twelve more tourist destinations in Quintana Roo; Cozumel, Isla Mujeres, Playa del Carmen, Riviera Maya, Tulum, Gran Costa Maya, Mahahual, Bacalar, Puerto Morelos, Chetumal and Maya Ka'an (CPTQ, 2021). In 2018, Cancun's tourism sector offered 35,000 hotel rooms where it received almost 5 million visitors, generated an economic pledge of approximately 5.5 thousand million dollars (Marketing Consultants, 2018a, Marketing Consultants, 2018b). Riviera Maya's tourism sector has surpassed Cancun's success, with more than 47,000 hotel rooms, where it received more than 5.1 million visitors, generating an even higher economic pledge of 6.2 thousand million dollars (Marketing Consultants, 2018b, Marketing Consultants, 2018a).

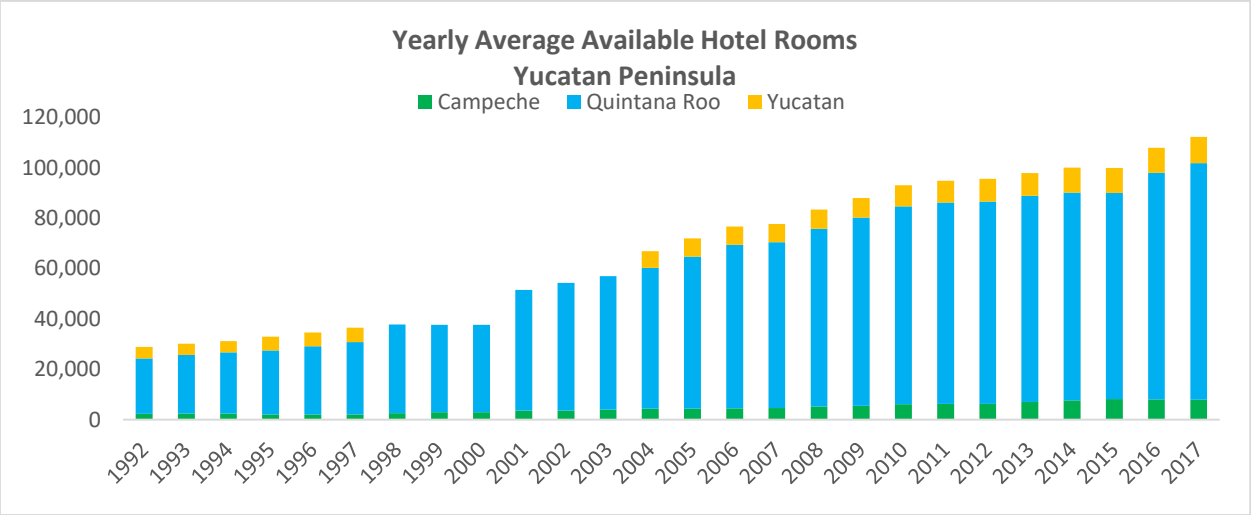
Figure 3-8: Cancun in 1970 vs Cancun in 2020

Source: photo obtained from https://www.cancuniairport.com/cancuns-50th-anniversary/

Quintana Roo's tourism success propelled the growth of the tourism sector throughout the Yucatan Peninsula, composed by the states of Campeche, Quintana Roo and Yucatan, highlighted in Figure 3-7. In 2017, the Ministry of Tourism (SECTUR) estimated that this region has more than 112 thousand hotel rooms, 84% of them distributed in the tourist destinations of Quintana Roo, 9.3% of them found in Yucatan and 7.1% of them in Campeche. Hotel infrastructure presents a steady growth in the three states since the 90s, being this more accentuated in the state of Quintana Roo (DATATUR, 2018). This is visible in Figure 3-9.

This region receives over 55% of the international tourists that visit Mexico (SNIEGT, 2016). In this region are found twenty-six protected natural areas, five World Heritage locations, 49 archaeological sites, 15 localities with tourism potential and six national strategic destinations, among them Cancun and Riviera Maya (SECTUR, 2018c).

Figure 3-9: Available Hotel Rooms per State



Source: (DATATUR, 2018)

Despite economic crisis like the Global Financial Crisis in 2007-2008 and the consequent global economic recession it brought or health crisis like the swine flu outbreak that happened in Mexico in 2009, tourism sector in the Yucatan Peninsula, and particularly in the state of Quintana Roo continued to grow and propel alternative tourist destinations in the region. The strength of this sector is also visible now, as despite COVID-19 pandemic, the hotel infrastructure continued to grow, Cancun now has more than 43,500 hotel rooms while the Riviera Maya presented more than 49,000 hotel rooms (Marketing Consultants, 2020a, Marketing Consultants, 2020b).

Despite the extraordinary economic growth that tourism generated in the Yucatan Peninsula, it also exacerbated the unequal development of the region, and dramatized the high poverty and marginalisation between the tourist destinations and its tourism cities, and towards the rural areas located in the backyard of the main tourist destinations.

3.1.1 Negative outcomes related to tourism in the Yucatan Peninsula

During the early stages of Cancun's development, the government had to attract people to the southeast of Mexico to provide human resources for the construction of public infrastructure, hotels, and tourism operations. Nonetheless, Cancun's success drew not only residents from the Yucatan Peninsula's impoverished areas, but also from across the country (Marti, 2017, Ambrosie, 2015, Torres and Momsen, 2005a).

To accommodate the population that migrated to Cancun, FONATUR developed housing projects for tourism workers, charging between $25 and $45 Mexican pesos (MXN) per square metre. To acquire a small lot or house, tourism workers had to compromise more than 25% of their monthly income for at least twenty years. For indigenous migrants, the concept of buying land through long-term credit was difficult to comprehend and accept, as land was a right and property was communal in their hometowns. This was unfair given the fact that hotel zone lots began at just $92.18 MXN per square metre and hotelier investors had access to diverse financing mechanisms to acquire hotel lots or operate finished hotels without jeopardising their financial capital (Ambrosie, 2015).

Because Cancun's development required the implementation of fiscal incentives and financial deregulations that resulted in significant economic leakage, tourism's potential to benefit the host population eroded. These financial incentives reduced the public budget allocated for public infrastructure and services investments for the residential areas. In 1972, investment for residential areas accounted for less than 9% of the destination's public budget, while 62% was spent on the tourist spaces (Ambrosie, 2015). The high influx of migrants from nearby communities and throughout the country surpassed the government's capacity to develop housing projects, infrastructure, and services like sewage, water, and energy, for Cancun's residents (Brenner and Aguilar, 2002). This generated and expanded poverty fringes on the outskirts of Cancun, a phenomenon that is also prevalent in other regional tourist destinations, including Playa del Carmen, Puerto Morelos, and Merida (Torres and Momsen, 2005a).

In the last population census conducted by INEGI (2015), Quintana Roo presented the highest immigration rate in the country, with more than 54% of its population being migrants, compared to the national average of only 17%. The municipalities with the most popular tourist destinations presented the country's highest immigration rates. Quintana Roo's municipalities of Solidaridad, which include Playa del Carmen and the Riviera Maya tourist destinations, have the state's highest immigration rate, at 67.5%. Benito Juarez, the municipality in which Cancun is located, ranked second, with a 63.1% immigration rate. Isla Mujeres and Tulum rank third and fourth, respectively, with 53.9% and 52.4% immigration rates (INEGI, 2015, INEGI, 2016a).

Migrants arrived – and continue to arrive – to the Peninsula's well-known tourist destinations, in search of opportunities to increase their income. However, Mexico's labour market deregulation facilitated the creation of a job offer that comprised mainly temporary jobs with low wages, poor working conditions, and minimum job mobility (Alvarez, 2014b, Brohman, 1996, Jenkins, 2015, Schilcher, 2007, Harrison, 2014, Torres and Momsen, 2005b, Torres and Momsen,

2005a, SECTUR, 2015b). This increased the number of working-poor individuals in these destinations, as most of the jobs hinder the possibility of attaining livelihoods. Additionally, tourism jobs demand workers to be available on a flexible schedule, and as a result, breadwinners – who are typically men and women in charge of the household – are forced to neglect their families, which has resulted in an increase in gang activity and violence among children of younger ages than in other states of the country.

Additionally, the collusion of diverse cultures, values, and customs in tourist destinations altered the idiosyncrasies and habits of the population that resides in these spaces, eroding the local population's identity. This was not contained within tourism cities, but was transported to the places of origin of the migrant population who live in the tourist destinations. This affected indigenous communities, as their members began to reject their own culture, customs, habits, and livelihoods in favour of the culture of the visitors and white-collar workers, who –usually- passively imposed their cultural identities (Jamal and Camargo, 2014a, Torres and Momsen, 2005a).

Tourism has failed to engage the Yucatan Peninsula's other economic sectors, and some have deteriorated because of tourism, impoverishing the rural areas surrounding the tourist destinations (Clancy, 1999, Collins, 1979, Torres and Momsen, 2005b, Torres and Momsen, 2005a). To exemplify, agriculture not only lost productivity due to labour migration from rural areas to tourism cities, but also as a result of urban growth and the development of new tourist destinations (Torres and Momsen, 2005b). Additionally, because tourist destinations were developed in devoid areas, these lacked complementary tourism activities such as handcraft production, reducing the expected multiplier effect of tourism on the region (Brenner and Aguilar, 2002, Jamal and Camargo, 2014a).

The neoliberal nature of the tourism sector in Cancun favoured a market-oriented economy, putting local or small-scale enterprises at a disadvantage when they attempted to provide ancillary services to the major hospitality companies. The dominant tourism enterprises maintained their own suppliers, most of whom were located in industrialised cities or outside Mexico. These companies argue that local or small businesses failed to meet their requirements in terms of quantity, quality and financial capacity, and thus prefer to work with suppliers located outside the Yucatan Peninsula (Jamal and Camargo, 2014b, Torres and Momsen, 2005b, Torres and Momsen, 2005a, Brenner and Aguilar, 2002).

Governmental authorities at the state and municipal levels altered territorial planning projects and legislation to support the entry of investments into the consolidated tourist destinations.

These changes facilitated environmental degradation, land dispossession, and the displacement or eviction of local entrepreneurs from their businesses in order to build new tourism amenities, even when doing so jeopardised the natural resources that underpin tourism success, such as beaches, coral reef barriers, and water cleanliness (Torres and Momsen, 2005b, Clancy, 1999, Diaz, 2018, Expansion, 2018). Holbox, a once idyllic small island located north of the Yucatan Peninsula, is a prime example of this. Municipal corruption enabled the island's urban plans to be altered, resulting in the proliferation of unregulated hotels and private rentals -such as Airbnb-. In 2018, the island experienced water and electricity shortages, as well as an overflowed drainage system, endangering not only the environment, but also the health of its residents and visitors (Varillas, 2018a). Holbox's inhabitants closed the port to prevent the arrival of more visitors to compel the state government to listen to their demands of increasing public service provision on the island. Despite this, the state and local governments continued to lobby for deregulation of protected areas to build more hotels and tourism amenities, ignoring the local community's protests (Vazquez, 2018, Ziegler et al., 2016, Aguila Arreola, 2018).

This has also occurred in rural areas adjacent to well-known tourist destinations, where *ejidatarios* have been forced to sell land reserved for agricultural purposes for the construction of tourism amenities (Jamal and Camargo, 2014b, Torres and Momsen, 2005b, Torres and Momsen, 2005a, Torres, 2002). To accomplish this, the federal and state legislatures passed legislation allowing for the deregulation of land and its use in order to continue fostering the growth of the tourism industry, of which several examples can be found on the Yucatan Peninsula (Varillas, 2018b, Vazquez, 2018, Aguila Arreola, 2018).

Despite these negatives results, the extraordinary economic performance of the tourism sector in Cancun and the Yucatan Peninsula allowed the Mexican government to continue propelling the tourism sector in Mexico through the implementation of tourism for development all over the country.

3.4 Institutionalisation of Tourism for Development

The Mexican government continued to develop tourist destinations all over Mexico, by implementing tourism for development policies at the Federal level. These policies consisted in attracting investment from big national and international tourism companies instead of promoting the participation of the residents and local businesses. A resume of the evolution of the tourism policies in Mexico is shown in Figure 3-10. As it can be seen, the government of

Vicente Fox (2002-2006) empowered FONATUR to continue capturing tourism investment, offering financing programs or fiscal incentives. Currently, FONATUR continues having these competences that allow this institution to keep generating new tourism projects, propelling tourism investment, selling land to investors, designing and executing projects of infrastructure, urbanization and conservation of the IPC destinations (FONATUR, 2018b).

Figure 3-10: Evolution of Tourism for Development Policies based on Brenner, L. and Aguilar A. (2002; 509)

Administration	Sectoral Objectives	Sectoral Instruments	Objectives
1970-1976 Luis Echeverria Alvarez	Reduce deficit in Balance of Payments Creation of Employment Regional development	FONATUR's foundation	Propel even regional development Creation of 4 strategic destinations: Cancun, Ixtapa-Zihuatanejo, Los Cabos and Huatulco
1977-1982 Jose Luis Lopez Portillo y Pacheco	Improve balance of foreign and domestic tourism Promotion of social tourism	National Tourism Development Plan 1980 Decree of tax relief in 61 tourist destinations	Reduce uneven regional development Fostering urban decentralization with the creation of "development poles" Defining 22 tourism areas with tourism potential
1983-1988 Miguel de la Madrid Hurtado	Creation of employment Increase of foreign currency earnings Promotion of cultural tourist destinations	National Tourism Development Plan 1984-1988 Federal Tourism Law, 1986	Promotion of: IPCs: Cancun, Ixtapa – Zihuatanejo, Loreto, Los Cabos, and Huatulco Traditional tourist destinations (TTDs): big cities, colonial cities, and towns
1989-1994 Carlos Salinas de Gortari	Promotion of social, cultural and youth tourism Growth of Domestic Tourism Increase national and foreign investment Promotion of "Mexico" as a tourist destination	National Tourism Modernization Program 1991-1994 Modification of the Federal Tourism Law, 1992	Balanced tourism development Preferential promotion of IPCs and TTDs. Promotion of border and colonial cities, as well as Mayan Region (The Yucatan Peninsula, Chiapas, and Tabasco).
1994-2000 Ernesto Zedillo Ponce de Leon	Increase competitiveness Fostering sustainable tourism development Create high-quality employment Increase foreign currency earnings	Tourism Development Program 1995-2000	Maintain preferential promotion of IPCs, TTDs, border and colonial cities and the Mayan Region. Promotion of the biggest cities: Mexico City (CDMX), Jalisco and Monterrey Promotion of "Tourism corridors" San Felipe–Santa Clara-Penasco, Loreto-La Paz-Los Cabos, Tajin-Veracruz-Los Tuxtlas, Tijuana-Ensenada, Chihuahua-Barranca del Cobre
2000-2006	Increase regional competitiveness	National Tourism Development	Strengthen and diversify tourism offering

Vicente Fox Quesada	Seek a balanced regional development Promote sustainable development Tourism as a National Priority Strengthen tourism development. Diversification of the tourism offering. Propel Domestic Tourism	Program 2001-2006	Improve competitiveness of MSMEs through training programs. Propel domestic tourism Measurement of the tourism performance: Tourism satisfaction Create sustainable tourist destinations FONATUR will oversee capitation of tourism investment through fiscal incentives
2006-2012 Felipe Calderon Hinojosa	Improve efficiency of fiscal policy Create formal quality jobs Promote regional productivity and competitiveness Balance regional development Transform Mexico into a tourism world leader Tourism to reduce poverty	Section included in the National Development Plan 2006-2012	Increase capitation of international tourists Propel the diversification of the tourism offering, including indigenous tourist destinations. Secure an integral tourism development, which helps reduce inequality.
2012-2018 Enrique Pena Nieto	Create quality jobs for the youth and vulnerable groups Promote sustainable development Improve infrastructure Increase competitiveness of strategic sectors Strengthen sustainable tourism development model	Sectorial Tourism Program 2013-2018 Competitiveness Agendas per destination	Diversify current tourism visiting markets (Russia, China, Korea, and Latin America) Diversify the tourism offering including cultural tourism, ecotourism, health, sport, luxury, and business tourism Improve the distribution of benefits from tourism to the local communities
Elected president for 2018-2024 Andres Manual Lopez Obrador	Reduction of Poverty Reactivation of the agriculture Strengthen of the domestic market Sustainable development Tourism as a tool for development	TBD Information obtained from the National Plan of MORENA	Mayan Train to connect tourist destinations found in the Mayan Region (Yucatan Peninsula, Chiapas, and Tabasco). Foster sustainable tourism development. Better distribution of economic gains to the local population Propel the creation of new tourist destinations in rural areas to balance regional development,

Sources: (Presidencia de la Republica, 2001a, Presidencia de la Republica, 2006, Presidencia de la Republica, 2001b, Presidencia de la Republica, 2013, Gobierno de la Republica, 2018, Brenner and Aguilar, 2002)

The different Mexican administrations have contemplated in their National projects the creation and consolidation of international tourist destinations, as well as the diversification of the tourism offering from “sun and beach” mass tourism model. This consisted in fostering

alternative tourism projects –such as cultural, adventure and rural tourism experiences, as well as ecotourism-. Nevertheless, Government channelled resources and support to alternative tourist destinations through institutions in charge on poverty alleviation, protection of indigenous communities or environmental protection, that lack of experience in tourism and therefore, results in bringing development through this industry are faint (Lopez Pardo and Palomino Villavicencio, 2008).

3.5 Community-based tourism as an engine for development of indigenous and rural communities

Rural and indigenous regions, which were the richest areas in terms of cultural and natural resources of the country presented –and continue to present- the highest marginalisation rates due to the inattention to the agriculture sector, consequence of the implementation of the import-substitution industrialization model in the 40s. Rural deterioration continued during the 80s to date with the adoption of the structural adjustment program proposed by the World Bank (WB) and the International Monetary Fund (IMF) and the later implementation of the neoliberal economic model. The Mexican government recognized that community-based tourism could help reduce the marginalization in indigenous and rural communities. However, it was not until the 90s when the government started to channelled resources to indigenous communities to propel tourism activities in their communities.

Rural and indigenous communities embraced tourism entrepreneurships because of the deterioration of the agricultural sector during the import-substitution industrialization model and the structural adjustment program that privileged industry and the opening of the economy, respectively. For the indigenous groups, the implementation of alternative tourism model represented not only a way to diversify their livelihood strategies, but also a way to recover the use and usufruct of the communal and *ejido* land and empowerment (Palomino Villavicencio et al., 2016).

3.5.1 Origin of community-based tourism in Mexico

Rural and indigenous tourism entrepreneurships happened due to several factors: In first place, the institutionalisation of tourism policies for development propelled the implementation of CBT in their territories. Additionally, most of the indigenous lands are extremely rich in natural

resources that altogether with their cultural resources made these communities tourism appealing. These factors were also enhanced by a growing global market of "consciously aware" tourists that seek travel experiences different to those provided by traditional mass tourist destinations. These tourists had higher income, more leisure time, and wanted to improve their life quality, and one way to do this was through the investment of their free time in the pursue of new activities and visit exotic places, preferring unique and authentic tourism experiences above the standardised experiences that traditional tourist destinations provided (Palomino Villavicencio et al., 2016). The latter factor led to the creation of "alternative tourism models" in an effort to diversify the tourist destinations that the country was offering at that time (Palomino Villavicencio et al., 2016, Lopez Pardo and Palomino Villavicencio, 2008).

By 1989, the Mexican Government, through the National Commission for the Development of the Indigenous People (CDI), developed eight ecotourism projects in indigenous communities, to generate sustainable development. Nevertheless, because of the growth of the demand of alternative tourist destinations, from 2001 to 2005, the Mexican Government invested 119.8 million pesos for the creation of 246 additional tourism projects. These public resources were channelled through different organism such as CDI, the Ministry of Social Development (SEDESOL), Ministry of the Environment and Natural Resources (SEMARNAT), National Forest Commission (CONAFOR) and the National Commission of Natural Protected Areas (CONANP), as well as the NGOs PRONATURA and the Mexican Fund for the Protection of Nature (FMNC). These resources benefitted 39,742 indigenous in twenty-three states of the country (Lopez Pardo and Palomino Villavicencio, 2008, Gasca Zamora, 2010, Palomino Villavicencio et al., 2016, Palomino Villavicencio and Lopez Pardo, 2018).

Either the local communities, NGOs, or the government aiming to diversify the productive apparatus, protection of the environment or alleviation of poverty started the alternative tourist destinations that were created in Mexico. In the cases where these tourism entrepreneurships were carried out in *ejidos* or communal lands, these were implemented as CBT model (Palomino Villavicencio et al., 2016). However, factors that affected the implementation, operationalisation and performance of tourism for development (T4D) in indigenous and rural communities neglected the participation of most of the communities' population in T4D (Gasca Zamora, 2010, Palomino Villavicencio et al., 2016).

Nowadays there are more than 600 alternative tourist destinations and these have been conformed in three diverse ways. The first consist in NPAs without a permanent tourism infrastructure which exploitation benefits mostly tourism operators. The second consists of CBT

destinations that are part of tourism circuits or corridors and concentrate a larger tourism infrastructure, such as the Mayan in the Yucatan Peninsula. The last one consists of small destinations with permanent tourism infrastructure, propelled by the local communities. (Lopez Pardo and Palomino Villavicencio, 2008)

Results of the alternative tourist destinations are diverse and heterogeneous, and there are not official statistics related to the success rate of the indigenous tourism enterprises created since 1989 to date. However, Palomino Villavicencio et al. (2016) show that of the 998 enterprises created, 75% of them are of communal property and 24% of *ejido* property. Most of the communal tourism entrepreneurships use a variety of different legal business forms and 46% of them are set up as group works and committees under the direction of the communal and *ejido* leaders. The latter shows that the absence of a management structure does not translate in a lack of proper performance of these enterprises. The indigenous social capital allows these communities to organise and run under mutual support codes carried out by forms of cooperative work without salaries, essential in communal livelihoods. This organisation operates in two levels, reciprocity and solidarity and it is expressed with practices such as *tequio*[3] or position systems[4] that structure communal life (Palomino Villavicencio et al., 2016, Litka, 2013, Litka, 2015, Taylor, 2017).

In terms of public investment in the development of indigenous tourism entrepreneurships, CDI reported that by the last quarter of 2013 they executed 286 projects to provide infrastructure, training and advertisement of alternative tourist destinations that benefitted 208 indigenous enterprises conformed by 8,313 individuals in twenty three states through the Program of Alternative Tourism in Indigenous Communities (PTAZI) (CDI, 2013). In addition, the subsecretary of the Ministry of Tourism (SECTUR), Ruben Corona Gonzalez, said that in this administration (2012-2018) with the development banks FIRA (Trust Funds for Rural Development) and Financiera Nacional de Desarrollo, SECTUR created nature tourism projects in communities with less than 50 thousand inhabitants, investing in infrastructure and tourism equipment more than 900 million MXN. In addition, SECTUR also invested in infrastructure in ecotourism and rural tourism areas, through the Special Concurrent Program, transferring 682 million MXN that helped over a hundred tourism projects. The World Tourism Organisation

[3] The community gives every citizen a task to be performed once or twice per month in benefit of the community PALOMINO VILLAVICENCIO, B., GASCA ZAMORA, J. & LÓPEZ PARDO, G. 2016. El turismo comunitario en México: perspectiva desde las instituciones y la gobernanza en territorios indígenas. *El Periplo Sustentable***,** 06-37%N 30..

[4] There are different positions: city hall, justice administration, agrarian, religious, development management, mediation and festivities in addition to Elder counsels Ibid..

(UNWTO) estimated that of the 35 million international tourists that visited Mexico in 2016, 25% of them consumed alternative tourism experiences during their stay in the country. The number of tourists that visited any of the Natural Protected Areas (NPA) was of 2.6 million people (SECTUR, 2017).

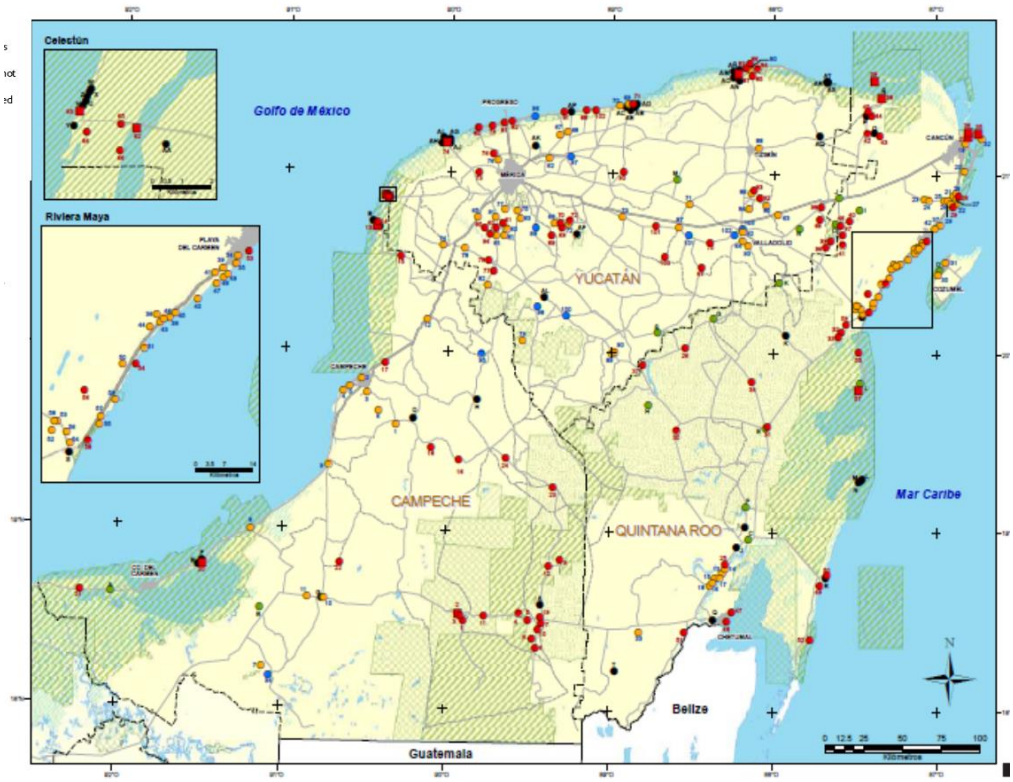
3.5.2 Community-based tourism in the Yucatan Peninsula

CBT projects conformed by indigenous communities all over the Mexican territory use the same organisation structure because of the *ejido* or community ruling in their territory. According to the scarce academic literature that studied CBT in the Yucatan Peninsula, *ejido* organisation also rules the creation and operationalisation of these alternative tourism projects (Palomino Villavicencio and Lopez Pardo, 2018, Mendoza-Ramos and Prideaux, 2018, Litka, 2013, Iturriaga and Rodríguez, 2015)

Tourism facilitators that include academics, NGOs and governmental institutions, implemented T4D initiatives that fostered CBT throughout the Yucatan Peninsula, by allocating resources for the diversification of marginalised communities' livelihood strategies. This was initiated by during the late 90s and early 2000s, when academics of the Mayan Region, at the Higher Technological Institute of Felipe Carrillo Puerto, designed a new natural tourism amenity called "senderos interpretativos" or "interpretative trails". Interpretative trails aimed to allow local inhabitants to diversify their economic activities with a reduced environmental impact. This project was created in a terrain located next to the institute, which is still operating but mostly for academic purposes.

The CDI replicated this tourist amenity in different communities across the Yucatan Peninsula through the PTAZI program, and even particular landowners of the area began to develop this tourism amenity independently. The interpretative trails were also used by NGOs and government institutions interested in implementing T4D programs that aimed for environmental protection. Currently, as seen in figure 3-11, the Yucatan Peninsula presents a phase of boom and expansion of alternative tourism developed in the outskirts of its main tourist destinations (Garcia de Fuentes et al., 2015).

Figure 3-11: Location of the enterprises dedicated to community-based tourism in the Yucatan Peninsula



Source: Garcia De Fuentes, A., Jouault, S. & Romero, D. 2015. Atlas de Turismo Alternativo en la Península de Yucatán.

The implementation of T4D initiatives and the establishment of CBT projects was imposed with a top-down perspective. While tourism facilitators aim for environmental protection and biodiversity conservation through implementation of sustainable tourism models to substitute traditional agricultural activities, the communities aimed to diversify their income sources to achieve livelihood. Figure 3-12 summarises the objectives that tourism facilitators and donors in the Yucatan Peninsula had for their T4D initiatives.

Figure 3-12: Aims of T4D initiatives

Name	Role	Aims / Objectives
Fomento Social Banamex (FSB)	Donor	Reduction of inequality and environmental protection
TDS Voyage	Donor	Support solidarity tourism initiatives
INDESOL	Donor	Support social and communitarian organisations

ViSozial e.V.	Donor	Foster authentic and sustainable tourism
Fundacion ADO	Donor	Achieve social, environmental and economic sustainability of marginalised communities
RARE	Donor	Motivate behavioural change in communities for environmental conservation
Multilateral Investment Fund (MIF) by Inter-American Bank of Development (IADB)	Donor	Implementation of community-based tourism initiatives for the socio-economic development of the communities
United Nations Development Program (UNDP) Through the Small Donations Program and Global Environmental Facility Fund.	Donor	Funding sustainable economic projects
Mesoamerican Reef Tourism Initiative (MARTI)	Donor	Implementation of good environmental practices in the tourism industry
Organizacion Mundo Maya	Donor	Develop a sustainable tourism offering in the Yucatan Peninsula
Fomento Ecologico Banamex (FEB)	Donor	Environmental protection and biodiversity conservation
Fondo Mexicano para la Conservacion de la Naturaleza (FMCN)	Donor	Environmental protection and biodiversity conservation
Fundacion para el Empresariado Mexicano (FUNDEMEX)	Donor	Implementation of sustainable projects for poverty alleviation
Rainforest Alliance	Donor	Protect the environment and livelihoods of farmers and forest communities
Pronatura	Facilitator	Conservation of the flora, fauna and priority ecosystems through sustainable development
Amigos de Sian Ka'an	Facilitator & Donor	Environmental protection and sustainable development

Universidad Autonoma de Yucatan (UADY)	Facilitator / Research Institution	To improve the socio-economic conditions of indigenous communities in Yucatan through CBT
Comision Nacional para el Conocimiento y Uso de la Biodiversidad (CONABIO)	Government institution & Facilitator	Articulation of CBT for environmental protection
Comision Nacional de Areas Naturales Protegidas (CONANP)	Government institution & Facilitator	Environmental preservation of NPAs and well-being of their inhabitants and users.
Comision Nacional para el Desarrollo de los Pueblos Indigenas (CDI)	Government institution & Facilitator	Contribute to the development of indigenous communities through sustainable productive projects
Co'ox Mayab	Tourism Network Operator	Sustainable development
Visit Calakmul	Tourism Network Operator	Promotes the communities of the network and links them with the market and external stakeholders
Maya Ka'an	Tourism Network Operator	
Visit Calakmul	Tourism Network Operator	

The influence of tourism facilitators was not enough for the communities to adopt CBT as part of their livelihood strategies, but it is clear that necessity triggered the establishment of tourism community-based organisations (CBOs) in the rural and indigenous communities of the Yucatan Peninsula (González de la Rocha and Escobar Latapí, 2008). In an effort to achieve livelihood, these communities embraced CBT to capitalize the tourism influx generated by the natural and archaeological amenities surrounding their villages, to obtain additional income from providing tourism services as they lacked other options.

Many of the T4D initiatives implemented in the Yucatan Peninsula have produced CBT destinations that have endured for decades. Many tourism CBOs have attempted continuously to articulate tourism networks to gain promotional support from the government, gain visibility and increase the tourism influx towards their communities since

the 2000s without much success. However, three strong tourism networks have emerged in the three states of the Yucatan Peninsula: Maya Ka'an in Quintana Roo, Visit Calakmul in Campeche and Co'ox Mayab in Yucatan.

Maya Ka'an's story goes back for a couple of decades when the municipalities of Felipe Carrillo Puerto, Lazaro Cardenas and Jose Maria Morelos for decades tried to make the government include them in the promotion of the tourism offering of the state as the Zona Maya. However, the Ministry of Tourism denied them this support arguing their offer of services was disjointed. The NGO Amigos de Sian Ka'an organised some of the tourism CBOs of the Mayan Region and with funding of IADB and United Nations Development Program (UNDP) articulated the network of Maya Ka'an. This network aimed to strengthen and standardised their tourism offering, provision of training to increase quality tourism services and the creation of a global brand (Maya Ka'an, 2018). This tourism network integrates tourism CBOs from 10 different communities, and it is recognised as one of the main tourist destinations of Quintana Roo since 2014. In 2018, Maya Ka'an was recognized as the most interesting eco-tourism destination of the state in the most important tourism market of Mexico, the *Tianguis Turístico* (Varillas, 2018c, La Jornada Maya, 2018).

Visit Calakmul in Campeche is also an un-researched CBT network. Calakmul Reserve is a World Heritage Site and comprehends different archaeological sites: Calakmul, Hormiguero, Balam Ku, Chicanna, and Becan (UNESCO, 2018). In the last years, Calakmul has captured the attention of both visitors and tourism developers for its natural and historical richness. In an effort to continue protecting the ecosystems, reduce market and governmental pressures and help local residents obtain economic gains from sustainable tourism activities, in 2014, the NGO PRONATURA invited five communities of Xpujil municipality to conform Visit Calakmul's network to connect with the market (Campos, 2018, Calakmul, 2018).

Co'ox Mayab is the a tourism network articulated in 2015 by academics of the Universidad Autonoma de Yucatan (UADY), the Yucatan Council of Alternative Community-Based Tourism (COTACY), the Ministry of Tourism in Yucatan (SEFOTUR), the National Commission for the Knowledge and Use of Biodiversity (CONABIO), and the civil association Act Locally for Ecological and Responsible Tourism (ALTER). This network was created in 2015 with funding from the UNDP, Fomento Banamex and Fundacion ADO among other. The network entails twelve communities located in the Yucatan Peninsula and aims to alleviating poverty through CBT, and also, to form a network of networks that unite the different tourism articulation efforts happening all over the Yucatan Peninsula (Lemas Valencia, 2019).

3.6 Conclusions

Mexico became a world pioneer in Tourism development in the 70s with the creation of Cancun. Cancun is that it is the perfect example of the neoliberal model of development that governments like to promote. This tourist destination was created in a devoid area with only 200 inhabitant in at the north of the Yucatan Peninsula to propel the economic growth of the Yucatan Peninsula. Now, 51 year later almost 700,000 people live there, has more than 35,000 hotel rooms, where it receives over 5 million visitors per year. Cancun propelled the touristification of the whole region that now offers more than 100 thousand hotel rooms where it receives almost 20 million visitors per year.

However, tourism was introduced to developing countries alongside structural reforms aimed at economic liberalisation and a market-oriented growth. These consisted in maintaining the lack of regulation or de-regulating of labour, environmental protection, land ownership, to foster investment. Nevertheless, despite economic growth, these reforms have dramatically enlarged inequalities within tourist destinations and towards rural communities in the vicinities of these (Alvarez, 2014a, Hampton and Jeyacheya, 2015, Jenkins, 2015) .

In the 80s, traditional tourist destinations began to show degradation, and the “environment crisis” impacted the values and lifestyle of the population in developed countries shifted the industry towards a more sustainable approach. Tourists wanted to have a positive impact on the residents and the environment of the places visited and Global North inhabitants wanted to visit exotic destinations, get in touch of the local culture and live “unique experiences” instead of getting a standardised tourism service in a resort.

These trends shaped tourism for development policies, and forced the Mexican government to diversify its tourism strategy beyond “sun and beach” tourist destinations, and create alternative tourism projects in rural and indigenous regions, which are extremely rich in natural and cultural resources that made these communities appealing. This led to the expansion of alternative tourism models all over the country and, specifically in the Yucatan Peninsula tourism facilitators implemented T4D initiatives in communities located in the outskirts of the consolidated tourist destinations (Garcia de Fuentes et al., 2015).

The results of T4D and CBT in the Yucatan Peninsula are heterogeneous, as well as their origins. Despite the touristic importance in the region, there is a dearth of scholarship on T4D in the Yucatan Peninsula. This investigation aims to cover this gap. To do so, in chapter 4, I present the

research design of this doctoral project, detailing the research aims, methods and selected case studies.

4 Research design: Aims and Methods

4.1 Introduction

The preceding chapters established the theoretical and contextual frameworks for this research, and emphasised the need of a grassroots perspective in the study of Tourism for Development (T4D). In Chapter 2, I provided relevant discussions on mainstream T4D literature that illustrate the failures that critical scholars have identified in T4D initiatives. However, most of these critiques take a top-down approach on T4D and neglect the experiences of tourism-embracing communities. To provide a bottom-up contribution to T4D, it was necessary to situate tourism within the livelihood strategies of the residents of the host communities using sustainable livelihood theories. Additionally, the Social and Solidarity Economy (SSE) allowed applying an "alternative to development" lens to tourism to identify unintended non-monetary benefits generated by community-based tourism (CBT).

In Chapter 3, I depicted the trajectory of T4D in Mexico, and in specific in the Yucatan Peninsula. The negative consequences of T4D's neoliberal character in the premier tourism destination of Cancun exemplified international tourism model's failures. Despite the sectors' negative impacts, Cancun's commercial success prompted the model's expansion through the creation of nine more tourism destinations (Isla Mujeres, Playa del Carmen, Cozumel, Riviera Maya, Tulum, Costa Maya, Mahahual, Bacalar and Holbox). The establishment of these tourism destinations facilitated the development of CBT ventures in the indigenous and rural communities throughout the Yucatan Peninsula in an attempt to alleviate poverty. Many of these CBT developments had a short lifespan, as they perished when T4D resources were depleted. Nonetheless, some communities have maintained CBT as a viable livelihood strategy for more than a decade. The three chosen communities represent some of CBT's 'successes', and their experiences with tourism prompted the development of this grassroots approach to T4D.

In section 4.2, I reflect on my positionality in light of how my personal and professional experiences informed the investigation's theme and study design, which evolved during and after my fieldwork. In section 4.3, I present my research aim and research questions in section, followed by the methods chosen to address these questions in section 4.4. In section 4.5, I address the ethical considerations of this project. I finalise this chapter with section 4.6 where I draw the limitations of this study and some of the challenges I encountered during data collection.

4.2 Framing my positionality

In this section, I explain how my personal experience, my professional background and my gender, influenced my research. Simandan (2019) argues that for us, qualitative researchers, recognising our positionality increases our awareness of our own assumptions and biases. Positionality help us clarify how our research participants' interpret us and how these interpretations influence the data collection process (Jacobson and Mustafa, 2019). I see myself as a non-indigenous middle-class woman that grew up in the most famous tourism destination in Mexico. While now I see myself as a development geographer, I started my PhD journey as a marketing researcher interested in maximising tourism profits. While these identities evolved during the research process, I hope that this clarifications allow you, my reader understand how the academic contributions of this dissertation were produced.

My interest in T4D originates from my personal and professional experience. I consider myself a Mexican privileged woman. Being born in a non-indigenous, middle-class family, allowed me to attain a better education and life experiences that the average Mexican woman. I was born in Mexico City, but my parents decided to escape from the soaring insecurity prevailing in the city at the ends of the 90s. They had the means to relocate our family to Cancun, as at that time, the growth of the tourism sector in the Yucatan Peninsula generated business and job opportunities for all migrants. Hence, I had the honour to grow up along with Cancun and to experienced first-hand the many effects that tourism development brought to the region and to its inhabitants. The growth of the tourism sector fostered infrastructure development that mostly entailed the construction of new tourism amenities, but also included the development of infrastructure and services for the growing population in the touristic cities. The geographical boundaries of the tourism cities expanded through the construction of residential complexes, and tourism growth fostered the establishment of new schools and universities, shopping malls, cinemas, restaurants and other entertainment venues that targeted the residents.

I undertook my undergrad studies in Cancun, where I specialised in Marketing, and afterwards I did a master in Business Administration with a Finance Specialisation. Attending to a prestigious university gave me membership to networks of social exchange (NSE) that included business and political leaders in Cancun. These NSE open the doors for me to collaborate with some of the most successful tourism-related enterprises in the region, doing marketing –mostly quantitative- research and financial appraisal of the tourism industry for more than 15 years. For many years, I lived in this clean and secure city, where people from the same population group as me, enjoyed a high quality of life. Because I was highly benefited from tourism, I was

convinced that Cancun's case was the perfect example of T4D; a strategic mega project implemented from "above", by the government with the collaboration of the private sector in benefit of the general population.

However, with the growth of tourism, living in Cancun became more difficult. It was a gradual cumulative change, noticeable only until the negative effects were impossible to ignore. Poverty and inequality were suddenly visible in the touristic cities as tourism generated mostly blue-collar jobs with low salaries and poor work conditions. Moreover, the situation was much worst in the rural communities of the Peninsula, as agricultural activities were abandoned and rural populations diminished as many breadwinners migrated to the tourism destinations. There were evidence of water pollution in the Caribbean Sea and in the cenotes, the coral reef got sick, and wildlife was harder to see as the rainforest was substituted with pavement, housing, shopping malls and hotels. This affected the weather, as temperature raised every year due to the reduction of the vegetation. Insecurity increased as well due to drug cartels activity, and I felt I lost my freedom to move without fearing being robbed or assaulted.

I not only experienced these negative effects but, thanks to my professional trajectory, I was able to measure their impact in terms of tourism satisfaction, economic spill over and degradation of the wellbeing of the residents of touristic cities and rural communities in their vicinities. Complaints from tourists increased regarding the lack of safety in the tourism destinations, the degradation of the local ecosystems, and the lack of authenticity of the tourism offering as it seems disconnected from the ancestral Mayan culture. From a business and financial perspective, the negative effects generated by the tourism industry affected economic revenues, as the costs of managing tourism complaints and improving safety increased. While tourism workers lived in very insecure and poor neighbourhoods with lack of public services like sewage and public lights, they worked serving tourists coming from rich countries in luxury hotels. This violent inequality in the tourism cities translated into some of the highest suicidal and gender-based violence rates in the country. Additionally, violence generated by drug cartels have reached not only local populations but also the tourism market, and have caused the closure of many businesses in the tourism destinations of the region.

Observing and experiencing the negatives effects that tourism brought to Cancun prompt my interest in pursuing a PhD in T4D, focusing in CBT ventures developed in the Yucatan Peninsula. Due to my business background, the initial aim I set for this investigation was to apply Porter's (2000) business cluster theory to CBT to develop another top-down contribution to T4D by constructing a CBT micro-cluster model. However, hearing the experiences of the inhabitants of

the tourism-embracing communities and observing their community life and tourism interactions, shifted my initial positionality.

Firstly, visiting the researched communities, two of them indigenous, made me question my non-indigenous identity. Class and ethnic discrimination in Mexico is a heritage from the Conquista (Quijano, 2008), and I never questioned my ethnicity before joining the PhD because I was highly benefitted from having a 'light' brown skin colour that in Mexico is perceived as white. However, I began to ask myself questions about my ethnicity when I arrived to the UK, as for the first time in my life I belonged to a minority group. I asked myself if I was a mestiza, as I have an indigenous-Mayan name, but no one in my family embraces any indigenous identity. However, embracing my Mexican nationality and that I am a consequence of *mestizaje*, allowed me to embrace my mestiza consciousness, as Delgado and Luhl (2013 p.p, 623), this identity allows students *"to balance negotiate and draw from bilingualism and commitment to communities and spiritualities in relationship to their education"*. While my light brown skin colour and the NSE that I belonged to before my PhD gave me access to external actors involved in T4D in the Yucatan Peninsula, such as NGOs and government officials, embracing my mestiza identity helped me build rapport with the residents of the communities. The residents of the communities saw me as a foreigner to their communities, and sometimes identified me as white, however, having a Mayan name made my participants curious and built a bridge of trust. The residents of the communities were open not only to participate in my research project, but they were very interested in teaching me about their culture and their Mayan Language.

Secondly, hearing viewpoints and experiences with tourism of the communities' inhabitants, made clear that what T4D and CBT literature need is a grassroots perspective. Therefore, I had to reject applying a business theory into T4D to create another top-down model. Instead, the only ethical path was to develop a bottom-up approach to T4D that acknowledges the communities' wisdom, as they are the actors that know best how to implement and operate T4D initiatives that consider their livelihood strategies and enable the fulfilment of their community-life projects (CLPs).

4.3 Research aim

The aim of this investigation is to provide a grassroots perspective on T4D scholarship by analysing the effects that CBT generated in the indigenous and rural tourism-embracing communities. I did this by identifying failures in T4D initiatives that hinder tourism for fulfilling

CLPs. Additionally, this bottom-up approach acknowledges unintended gains from CBT that are non-monetizable but enabled the fulfilment of CLPs.

This aim was addressed with the following research questions:

1. *How have the unrecognised CBT gains for CLPs expressed themselves in the communities that embraced tourism?*

This research question aims to depict the trajectories of how these 'alternative' gains manifested in each of the researched communities. To achieve this it was necessary to understand first what the residents of the host communities defined as 'development', which in this dissertation is conceptualised as CLPs. Consequently, this question allowed analysing if the distribution of CBT gains varied in the researched communities as well as identifying, which factors shaped the manifestation of the identified benefits.

2. *Are there unrecognised barriers in T4D initiatives that inhibit the fulfilment of CLPs?*

This question aimed to uncover failures in T4D initiatives that the current literature overlooks. While most of the sustainable tourism ventures have a reduced lifespan, in the Yucatan Peninsula some communities have maintained CBT as a livelihood strategy for decades. However, in the communities most of their population were excluded initially from T4D initiatives, and in some cases, most remained marginalised from tourism in the long term. Therefore, this question aims to respond which were the barriers that hindered the local populations to engage in T4D and CBT, and which obstacles the members of the tourism community-based organisations (CBOs) had to overcome to consolidate tourism as a new livelihood strategy.

3. *Which unacknowledged benefits emerged from adapting CBT to the reciprocity and solidarity cultures of the host communities?*

While most of the tourism-embracing communities present reduced tourism-related economic spill and low tourism influx, the extended lifespan of CBT suggested the adaptation of tourism to their cultures and the possibility of the generation of 'alternative' gains. Hence, this question aims to identify which are the perceived benefits that CBT generated but that did not followed capitalist logic but contributed to the fulfilment of their CLPs. The identification of this gains was possible through the operationalisation of Coraggio's (2011b) framework on the principles that guide the construction of the SSE.

4.4 Research design

To answer the research questions, I used a comparative approach using qualitative tools to identify the outcomes of T4D in three different communities in the Yucatan Peninsula. The methods used were interviews, participant observation and network diagrams of socio-economic interactions. These methods served to explore the relationships between the different actors and their perspectives on the outcomes consequence of the incursion in tourism of their communities (De Propris, 2005, Lazzeretti and Capone, 2008, Novelli et al., 2006).

Qualitative tourism research emerged in the 1970s as anthropologist, sociologist and geographers began to investigate this sector (Wilson et al., 2020). Nevertheless, most tourism scholarship is dominated by quantitative methods and most qualitative tourism research is underpinned by positivist worldviews (Mura and Sharif, 2015). Tourism scholarship that approaches the field using non-positivist viewpoints, positionality and first person perspectives appeared around 2007. While it is still nascent, qualitative research in tourism facilitates the acknowledgment of the complexities that shape everyday life, how people give meaning and understand tourism, and how their interpretations shape their geographies (DeLyser et al., 2010). On the other hand, comparative research enables exploring not only similarities and differences, but also singularities of particular entities that could be overlooked through other methods (Mills et al., 2006). Therefore, I decided to investigate three community, or three case studies, to explore T4D in depth in its 'real-life context' and compare these stories (Xiao and Smith, 2006 p.p. 739).

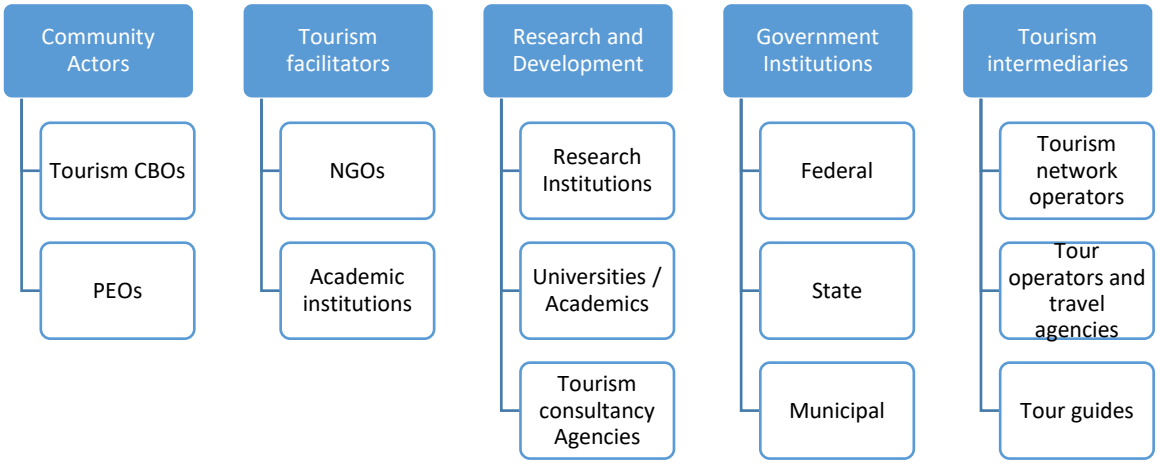
The qualitative, comparative approach applied in this investigation facilitated unveiling a bottom-up perspective of T4D. The analysis of similarities in the implementation of T4D initiatives in the three communities permitted depicting the trajectories of the distribution of the gains in each community, analysed in Chapter 5. These differences allowed detecting singular characteristics in each community that influenced the distribution of the discovered gains for CLPs. The definition of CLPs allowed uncovering the barriers that the communities' residents had to overcome to adopt tourism as a new livelihood strategy detailed in Chapter 6. The study of similarities in the outcomes of tourism allowed defining a taxonomy of gains from CBT that contribute to the fulfilment of CLPs, which is described in Chapter 7.

In the next section, I detail how e selection processes of the research participants and the case studies.

4.4.1 Selecting research participants

In section 4.2 where I depicted my positionality I mentioned that my initial plan was to apply Porter's cluster theory to this investigation. Porter indicates that the associative infrastructure of a cluster consisted in the firms participating in the sector, governmental authorities, support industries, suppliers, research institutes, educational institutions (Collins, 2010, Porter, 2000). While Porter focuses on large-scale industries, I adapted the associative infrastructure according to the characteristics of CBT in the Yucatan Peninsula and defined a list of potential research participants that include community actors, tourism facilitators, research institutions, academics, tourism consultants, government officials at the federal, state and municipal level and tourism intermediaries, as seen in figure 4-1. Therefore, I interviewed the different actors involved in the development of CBT in each of the chosen communities.

Figure 4-1: Selected Research participants



Because of my professional background, I was able to secure gatekeepers that supported or were involved in the implementation of the most famous T4D initiatives in the Yucatan Peninsula. These gatekeepers were Marketing Consultants Research Agency, Sustentur Consultancy Agency and a researcher that conducted investigations in the natural protected area (NPA) of Sian Ka'an. These actors facilitated my access to tourism facilitators, academics, government officials and gatekeepers inside the communities.

4.4.2 Selecting the case studies

Before going to fieldwork, I initially proposed a mixed methods approach of three phases to analyse the outcomes of T4D in the researched communities. The first stage consisted in the analysis of secondary data, to make a general spatial and socio-economic characterization of CBT in the Yucatan Peninsula (Capone, 2006, Findlay, 2011, Lee et al., 2013, Novelli et al., 2006). The main sources of information would be censuses published by the INEGI (National Institute of Statistic and Geography) and tourism studies conducted by the Ministry of Tourism. This process would serve to select communities for this investigation where I would conduct further investigations. The second phase was a quantitative study to make a pre-characterization of the 'associative infrastructure' of the selected communities to find out how it supported the communities. The third phase consisted in a qualitative research consisting on interviewing the different actors involved in T4D to understand their perspectives regarding CBT. This stage also included participant observation in the communities, to observe tourism operations, the interactions between inhabitants of the host communities with their visitors and community life.

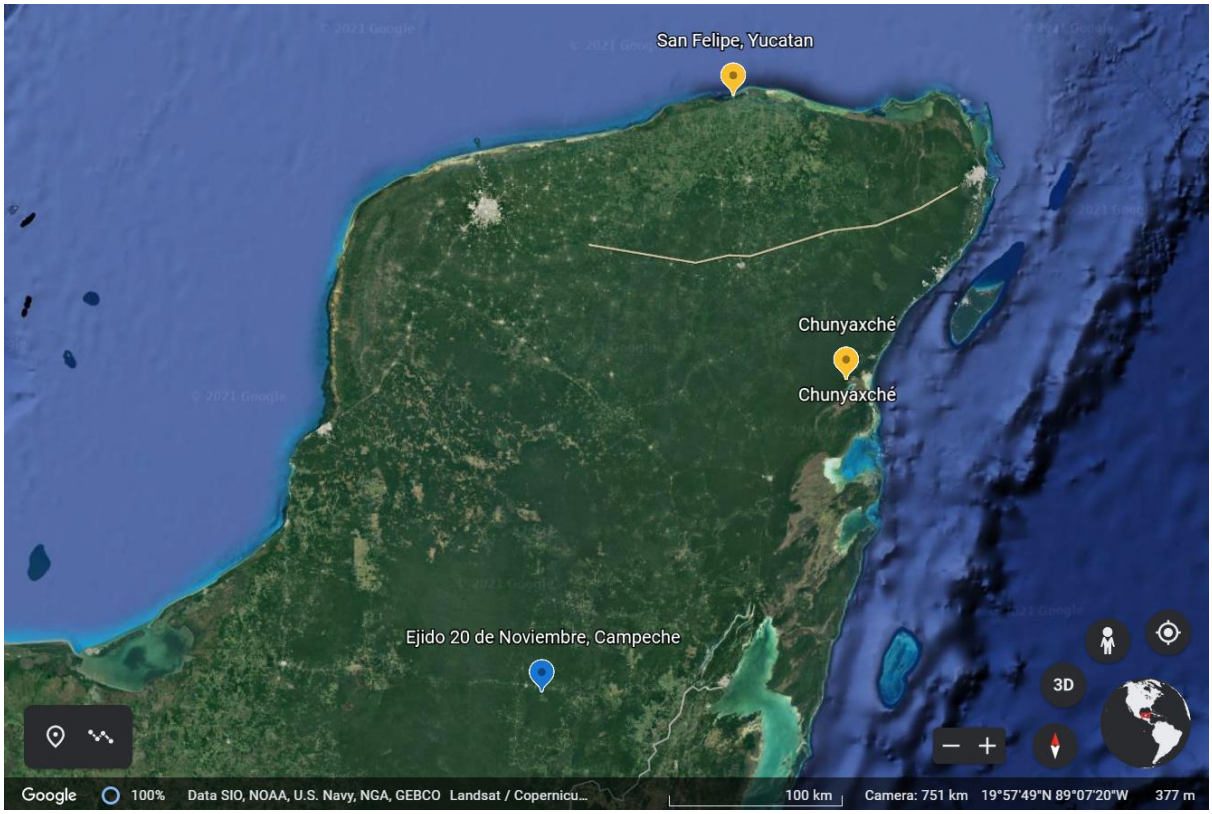
However, different factors affected the initial research design that led to the dismissal of the first and second research phases. To begin, the lack of disaggregated data at community level in INEGI's and the Ministry of Tourism data banks impeded making the spatial and socio-economic characterisation of CBT in the Yucatan Peninsula. This impeded the selection of the case studies using secondary data as well as the pre-characterisation of their 'associative infrastructure', and I had to begin the research by interviewing my gatekeepers. During these encounters, I shared the objectives of my investigation and with their expertise and knowledge, they helped me select the communities that could allow me obtain a holistic perspective of T4D in the region. I wanted to select three communities with different tourism potential and trajectories, therefore I chose communities that were located in or in the vicinities of NPAs, that had different tourism offering, received different tourism influx and had been working with CBT for more than fifteen years. These communities were contextualised in Chapter 3 and are summarised in figures 4-2 and 4-3.

Figure 4-2: The case studies

Case Study	Chunyaxche	Ejido 20 de Noviembre	San Felipe
State	Quintana Roo	Campeche	Yucatan
Proximity to Cancun	150 KM	400 KM	153 KM
Natural protected area	Operates in Sian Ka'an NPA	Voluntary NPA of Ejido 20 de Noviembre, next to Calakmul's NPA	Between of Ria Lagartos Biosphere and Dzilam State Reserve

Main tourism offering (CBT)	Boat tours in the lagoons and channels of Sian Ka'an and interpretative trails in the mangrove	Artisan workshops and archaeological tours to Rio Bec	Boat tours to different points of interest for flora and fauna sightseeing
Complementary tourism offering	Archaeological site of Muyil (operated by INAH), food and beverage provision, handcraft and petty trade shops	Temporal accommodation, food and beverage provision, petty trade	Temporal accommodation, food and beverage provision, handcraft and petty trade
Tourism influx	Constant daily tourism influx, limited to a maximum of 108 people per day	Scarce tourism influx towards the community. Could be months without receiving visitors	Constant tourism influx on weekends and high tourism seasons.
Tourism facilitator	NGO Amigos de Sian Ka'an	NGO PRONATURA	UADY
Tourism network	Maya Ka'an	Visit Calakmul	Co'ox Mayab

Figure 4-3: Geographical location of the selected communities



Source: Map obtained from https://earth.google.com/web/search/Muyil,+Chunyaxch%c3%a9,+Quintana+Roo,+Mexico/@

19.96364626,-89.12245918,377.20257575a,750370.10518514d,35y,-0h,0t,0r/data=CigiJgokCXKsL_tgfTJAEZPk3T4hcjJAGTQz2JXeUFbAITFiTTanVlbAMicKJQojCiExOXo0RmtLQ3lNd0xyQzVkX0RBbnZweHNaWGZXYUtZWTM

4.4.3 The methods

The methods to collect data were interviews and participant observation, common methods used by tourism researchers (Wilson et al., 2020). I also used network diagrams to map the tourism workers economic interactions. These methods allowed exploring the relationships between the actors involved in T4D, understanding their interpretation of development and unveil their perspectives on the outcomes CBT (De Propris, 2005, Lazzeretti and Capone, 2008, Novelli et al., 2006)

Interviews are one of the most common qualitative methods used in tourism research, as they facilitate understanding and make sense of social realities (Wilson et al., 2020, Jennings, 2005). I initially developed a semi-structured questionnaire following an interview guide based on Kleine's guide that aimed to clarify how information and communication technology (ICT) policies were experienced by micro entrepreneurs in Chile and adapted to identify the perspectives of T4D of the different research participants (Kleine, 2007). This questionnaire ensured the coverage of key topics and give the opportunity to interviewees to bring up themes they consider relevant (Willis, 2006). However, after conducting a pilot study, I observed that the research participants were generous in their answer and I did not need to ask all the planned questions as their responses touched the themes of my complementary questions. Therefore, I simplified the questionnaire.

The interviews were conducted in Spanish and they audio was recorded. I conducted the interviews from December 2018, to April 2019. I conducted the interviews with the tourism facilitators, actors in research and development, government officials and tourism intermediaries in the cities of Cancun, Merida, Playa del Carmen, and in the towns of Felipe Carrillo Puerto and Xpujil. The interviews with the community actors took place in their work and home spaces in the communities of Chunyaxche, Ejido 20 de Noviembre and San Felipe.

As I mentioned previously, I first interviewed my three main gatekeepers that were involved in T4D initiatives in the Yucatan Peninsula. The first gatekeeper was part of Sustentur Consultancy Agency, a tourism consultant that worked with the three tourism networks (Maya Ka'an, Visit Calakmul and San Felipe). This gatekeeper put me in touch with the tourism facilitators of the

three communities, the NGOs Amigos de Sian Ka'an and PRONATURA, and the academics that created Co'ox Mayab, as well as an academic from the Universidad Intercultural Maya de Quintana Roo, that conducted research in the communities in Calakmul including the Ejido 20 de Noviembre. Additionally, a Mayan researcher from Felipe Carrillo Puerto put me in touch with CONANP, institution that granted me authorisation to stay in the NPA of Sian Ka'an to conduct my research in Chunyaxche. The forest ranger acted as my gatekeeper in the community of Chunyaxche. In Ejido 20 de Noviembre, my gatekeepers were the tourism networks operator Visit Calakmul and two members of the community that had the roles of representatives of tourism and the artisans in the municipality. A head researcher from the agency Marketing Consultants helped me get access to the Minister of Tourism in Quintana Roo, Marisol Vanegas, and to Benjamin Jimenez Executive Director of Strategic Planning in the Council of Tourism Promotion in Quintana Roo (CPTQ). This researcher facilitated my access to my gatekeeper in the community of San Felipe.

Thanks to the gatekeepers in each community, I was able to start conducting interviews with the tourism workers in the communities. I used a snowballing sampling to identify and interview actors that participated in PEOs that provided ancillary or complementary service to the main tourism offering, being these PEOs operated in the formal or informal sectors of the selected communities. This sampling model also enabled me to identify and interview tourism intermediaries that were involved in the communities. To achieve data saturation, I conducted a maximum number of interviews of the different groups of actors involved in T4D inside the communities, which I present in figure 4-4 (Collins, 2010, Willis, 2006).

Figure 4-4: Interviews inventory

	Scope of action				
Actor	**Three locations**	**Chunyaxche**	**Ejido 20 de Noviembre**	**San Felipe**	**Notes**
Tourism community-based organisations	NA	7	10	7	All tourism CBOs represented
Popular economy organisations	NA	9	2	6	PEOs identified that provide ancillary or complementary goods and services to the main tourism offering
Tourism intermediaries	3	2	0	5	Includes tour operators, tour guides and travel agencies

Tourism network operator	NA	1	1	1	Each community belongs to a distinct tourism network: Maya Ka'an, Visit Calakmul and Co'ox Mayab
Tourism facilitators (NGOs and Academics)	NA	2	1	1	Includes the NGOs Amigos de Sian Ka'an, PRONATURA and UADY
Research Institutions	1	0	0	0	They do not research Calakmul and research on Yucatan is reduced. No other agency was identified
Municipal Government	NA	1	1	1	President of the Municipality of Felipe Carrillo Puerto (Chunyaxche), Tourism Director in Calakmul (Ejido 20 de Noviembre) and the President of the Municipality of San Felipe
State Government	NA	2	0	0	I was not able to contact the Ministry of Tourism offices in Yucatan and Campeche, however, governmental tourism activities in these states are incipient
Federal Government	NA	1	1	1	CONANP operates in each NPA
Universities / Academics	0	2	1	1	Each academic has conducted research in at least two of the three communities
Tourism Consultancy Agencies	1	0	0	0	This consultancy agency has contributed in the three selected tourism networks
Total	**5**	**27**	**17**	**23**	**72**

Since I conducted the interviews in areas where all the tourism CBOs operated, it was possible to invite my interviewees to participate in the creation of network diagrams of their economic interactions. This participatory communitarian method helped me understand the economic relations of the tourism workers, and assess how the economic gains from tourism were distributed in and outside the communities (Soliz Torres and Maldonado, 2012). In total, the research participants made five network diagrams, two in Chunyaxche, one in Ejido 20 de Noviembre and two in San Felipe. Examples of these diagrams are shown in figure 4-5.

Figure 4-5: Network diagrams of economic interactions

Parallel to interviews, I conducted participant observation of tourism operations, interactions with tourists and community life. Participant observation served to understand and register the way the different actors involved in T4D stablish relationships between them (Laurier, 2016, Cole, 2005). In the three communities I participated directly by experiencing the tourism offering, or observing the members of the tourism CBOs providing their tourism services to their visitors. I also observed their process of organisation their daily working rota, and the distribution and redistribution of gains at the end of their daily operations. In the three communities, I was able to observe community life, participate in the *faginas*[5] that occurred during my visit, and social interactions centred on lunches and dinners. The observations were documented in a research diary, as well as photographs - when permitted - that exemplified the observations.

[5] Faginas are a Mayan institution of communal work that requires that every adult in the community participates in community projects periodically (Cruz, 2003, p.p. 499).

Figure 4-6: Participant observation of tourism experiences and interactions with tourists

Figure 4-7: Participant observation of organisation of tourism operations

Figure 4-8: Participant observation of community life

Analysis of the interviews and observations was done in NVivo using content analysis. I transcribed the interviews in Spanish and photographed my research journals to upload them to NVivo. The triangulation of the data obtained through the different methods enabled the identification of the meta-themes, from the perspective of the different research participants (Jennings, 2005). The coding was done in English and Spanish, and the codes were categorised according to the actor type. I present quotes from the many interviewees throughout this dissertation, however I translated and edited these statements to clarify the actors' messages to the reader.

4.5 Ethics

In November 2018, the University of Sheffield's Research Ethics Committee approved this study. I submitted the ethics application along with the participant information sheets and participant consent form in English and Spanish. While my research topic does not cover sensible topics, it involves vulnerable population groups who are economically marginalised; hence, I would like to reflect on the main ethical consideration I had during data collection, which relates to anonymity of the research participants.

To make my project as transparent as possible, I provided all research participants with detailed information about my research project and the rationale behind the questions I wanted to ask. I made clear to all the people I contacted during my fieldwork that I was a student at the University of Sheffield and that my research was not affiliated with any government institution, tourism facilitator or actors involved in T4D in the region. I distributed the information sheets and obtained written consent from the research participants. I also read the content of the participant information sheets and consent forms to the participants I suspected were unable to read them and recorded their consent to participate in the project. I did not record the interviews of participants who requested to remain anonymous, and the information they supplied was registered as notes in my research journals anonymously.

Although the majority of the research participants refused to remain anonymous, I chose not to link their names to the remarks I used in this dissertation to avoid creating conflicts between them. In the case of public figures such as government officials, tourism facilitators and community leaders I did provided their names or posts as their actions are public matter.

I downloaded and stored the data collected during fieldwork in my university drive and I stored my research journals in my working space in the Department of Geography at the University of Sheffield.

4.6 Limitations of this project

As a female researcher, I had to face numerous challenges while conducting fieldwork in Mexico's machista culture (de la Morena, 2020). Throughout my fieldwork, I experienced constant verbal sexual harassment by the male research participants, who constituted the majority of the actors involved in T4D in the region and inside the communities. This hampered data collection in a variety of ways. Harassment came from few governmental actors, but primary from the male inhabitants in the researched communities, particularly in San Felipe. Therefore, I decided to shorten my conversations and interviews with these actors. Because of the machista culture prevalent in San Felipe, I was unable to undertake participant observation of the many tour boats they provided, since I feared for my own safety at times. The persistent and severe sexual harassment I faced in this community also contributed to shorten my stay in this place; however, I secured sufficient interviews to achieve data saturation. I must acknowledge that I experienced trauma symptoms during and after fieldwork. I experienced anxiety while analysing the interviews I conducted with the members of this community, since I relived the harassment when I listened to these audio recordings (Schneider et al., 2021, Williamson et al., 2020). To the best of my ability, I avoided allowing this situation to influence my portrayal of this community.

The remaining constraints of this thesis are due to the nature of the data collection methods used. The limits of interviews entailed the refusal of key actors to be interviewed, bias in the data gathered caused by gatekeepers' pressure on interviewees, the wat the questions were structured and my own positionality. There is also the risk of lack of representativeness of the data obtained from each research participant (McDowell, 2010, Jensen and Glasmeier, 2010, Willis, 2006). The limitations of participant observation include my "natural attitude" to tourism activities; my own preconceived notions about how T4D should function may inadvertently cause me to incur bias or nuance my research (Laurier, 2016). To mitigate these risks, I seek for representativeness in the assertions obtained and supported these by triangulating the information from the interviews with participant observation and other sources, such as newspapers (Dean, 2017, Healy, 2017). Additionally, I engaged in continuous self-reflection throughout the data collection, analysis, and writing processes.

5 Community Life Projects: Tourism Gains Based on the Social and Solidarity Economy

5.1 Introduction: Different outputs in Community-Based Tourism for the Social and Solidarity Economy

This first empirical chapter contributes to the Social and Solidarity Economy (SSE) scholarship, as it argues that the SSE can be developed through tourism, an economic sector normally overlooked by this theory's proponents (Coraggio, 2017, Gaiger, 2015, Gómez Calvo et al., 2016, Labrador Machín et al., 2017, Marañón Pimentel, 2014). To do this, in this chapter, I introduce each community's unique alternative to development trajectory that enabled CBT to generate gains that are non-monetizable, but contributed to strengthen of the SSE and attainment of community life projects (CLPs)[6]. These gains entailed an increase in key resources that empowered host populations to fulfil their CLPs and, incorporating solidarity principles into different economic processes, thereby fostering their SSE, which I detailed in Chapter 7. These gains, however, were not distributed evenly among the three communities. Gains permeated different population groups, economic activities, and economic processes in each community. This resulted in varying degrees of development of the SSE and, as a result, different contributions to the fulfilment of CLPs (Coraggio, 2011b, Blaser, 2010). The stories I depicted in this chapter are 'The paradox of CBT success and SSE's confinement' in Chunyaxche; 'Cooperativism as SSE principle' in San Felipe and; 'CBT adaptation to *Ejidal* organisation for CLPs' in Ejido 20 de Noviembre.

The paradox of CBT success and SSE's confinement refers to a weak form of SSE caused by the exclusion of most of the community, with an absence of presence of CLPs. This story occurred in Chunyaxche, which presented the highest tourism influx and economic spill over. However, despite this 'success', the majority of its residents remained marginalised from CBT due to T4D's failures and the severe fragmentation of this community's *ejidal* organisation. In this community, the gains only permeated into the economic activities and processes that involve the tourism CBOs' members and their networks of social exchange (NSE). Chunyaxche's popular economy is

[6] Community Life projects (CLPs): This concept refers to the satisfaction of the needs and legitimate desires of the inhabitants in a community, that Coraggio (2011a) defines as "la reproduccion ampliada de la vida" (RAV), but to simplify the translation I adapted 'life projects' term coined by Blaser BLASER, M. 2010. *Storytelling Globalization from the Chaco and Beyond*, Duke University Press.. Section 2.4 expands on this concept.

disarticulated from CBT and remained stagnated at the margins of the prolific tourism sector. In this community, collective efficacy remained among the members of the tourism CBOs and, to a lesser degree, their employees, and only these actors were able to pursue their life projects.

Cooperativism as potential foundation of SSE depicted a process in which solidarity permeated all economic aspects of the community, fostering the SSE and the fulfilment of CLPs. This case refers to San Felipe's trajectory, where its inhabitants have experience in organising themselves into cooperatives. Therefore, cooperativistic values akin to the SSE solidarity principles were incorporated into CBT, resulting in the consolidation of three tourism CBOs into a single organisation to accomplish their CLPs, one of the most radical forms of solidarity observed. Solidarity extended beyond tourism and reached tourism CBOs' NSE, as these network's members established popular economy organisations (PEOs) that provided complementary tourism services that include temporal accommodation, food and beverages provision, handcrafts, and petty trade. This facilitated the articulation of a CBT value chain that integrated the primary tourism services to the PEOs' complementary offering, as well as the inclusion of traditional economic activities such as fishing and cattle raising as ancillary sectors to CBT. This fostered collective efficacy and strengthened the residents of San Felipe's ability to protect their local economy collectively (Jørgensen et al., 2020, Coraggio, 2011b).

CBT Adaptation to ejidal organisation for CLPs exemplifies a process characterized by high levels of solidarity in all economic processes, which enabled the development of the SSE and attainment of CLP. This story refers to Ejido 20 de Noviembre's experience, which developed the SSE and fulfilled their CLPs despite its high level of poverty, limited tourism influx, and minimal economic spill over from tourism. In this community, the inhabitants' social and economic relations are governed by reciprocity and solidarity values, and these permeated CBT. 20 de Noviembre's *ejidal* council has ownership of its territory, which ensured that all its residents had access to CBT resources, which facilitated the establishment of PEOs providing complementary tourism services. This community also created a CBT value chain that integrates the main tourism offering, the complementary tourism services and included their traditional livelihood strategies (timber and survival agriculture) as ancillary sectors to tourism. This fostered collective efficacy that spread out outside the community, resulting in territorial projects such as the establishment of the Visitor Information Centre (CIT) in the town of Xpujil to promote the tourism offering of five communities in Calakmul.

Drawing the three stories of development of a tourism-based SSE facilitated identifying the factors that influenced the variations in community gains. These factors include external causes

like the dissimilar intensity of T4D failures in each community, which I analysed in detail in Chapter 6. However, the variations in gains from CBT also link to internal causes, such as the continuity of the communities' traditional livelihood strategies parallel to tourism, their forms of social organisation of work and cultural forms of organisation that create exclusions, for example, according to gender or level of marginalisation of specific populations groups. These factors impacted on the manifestations of alternative gains, which are visible in the generation of collective efficacy [which is the willingness of a community to work for the common good (Jørgensen et al., 2020)], the growth of the popular economy and the creation of CBT value chains that integrate the traditional economic activities in tourism.

Section 5.2 of this chapter describes the methodological progression that enabled the definition of the three SSE trajectories, and identifies the external and internal factors that influenced the reach of the gains in the three researched communities. The paradox of CBT success and SSE's confinement that refers to Chunyaxche's story is discussed in section 5.3. San Felipe's story, cooperativism as potential foundation of SSE is presented in section 5.4. Section 5.5 presents Ejido 20 de Noviembre's trajectory, CBT Adaptation to *ejidal* organisation for CLPs. Finally, section 5.6 presents this chapter concluding remarks.

5.2 A tourism-based SSE: factors that shaped the expansion of the gains

Interviews and informal conversations with members of tourism CBOs and PEOs in each community, as well as participant observations, facilitated depicting the manifestations of CBT gains for CLPs. Additionally, participatory network diagrams of economic relations enabled me to determine how tourism CBO members distributed their economic gains in the communities and inspired the depiction of CBT value chains in the three communities. These methods aided in identifying the manifestations of CBT gains. The first form of expression of the gains is the distribution of the tourism-related earnings across the members of the tourism community-based organisations (CBOs). The second is the expansion of the popular economy through PEOs that offer complementary tourism services, and the integration of CBT value chains. Thirdly, at the communities with a stronger development of the SSE, the gains generated collective efficacy and the fulfilment of CLPs.

Each of the researched communities exhibited wide variations in CBT-generated gains. These differences are the consequence of external factors, the failures of T4D initiatives. These failures shaped CBT projects and resulted in varying degrees of exclusion of population groups within

each community, as they facilitated or precluded the creation of PEOs that offered complementary services to the main CBT activities. T4D failures were particularly pronounced in Chunyaxche, where the majority of the population remained excluded from CBT, and impeded the growth of the popular economy. Conversely, the communities of San Felipe and 20 de Noviembre, exhibited a lower intensity of T4D failures, which fostered the establishment of PEOs that supported the core tourism offering, thereby allowing for greater population integration into tourism.

The variations in the gains linked to internal factors as well. The first internal factor is the maintenance of the communities' traditional livelihood strategies. This allowed the growth of the popular economy and the integration of these economic activities into the CBT value chain along with complementary services offered by the new PEOs. The inhabitants of the communities of San Felipe and Ejido 20 de Noviembre were able to maintain their main economic activities in parallel to tourism, enabling them to integrate these into their CBT value chains as ancillary sectors. However, in Chunyaxche, the establishment of Sian Ka'an's natural protected area (NPA), dispossessed its residents of the territory where they performed their traditional economic activities, and the focus on developing CBT in their territory decimated the community's traditional economic vocation, as agricultural activities do not receive any support for their strengthening.

The second internal factor is the communities' forms of social organisation of work, which affected the reach of the tourism gains among their wider populations. Cooperativism and *ejidal* organisation, from San Felipe and 20 de Noviembre respectively, allowed the inclusion of a broader population groups into their economies, as their social and economic relations are guided by reciprocity and solidarity values. Despite Chunyaxche has an *ejidal* organisation, the severe fragmentation of its *ejidatarios*, linked to the size of the *ejidal* council –with more than 600 members- and, the influence of external investors in the community, allowed the economic exclusion of the majority of its residents.

The third internal factor is cultural factors that contribute to exclusion based on gender and level of marginalisation. For instance, the machista cultures prevalent in the Chunyaxche and San Felipe excluded women from CBT. Additionally, in San Felipe, members of tourism CBOs harassed PEOs that did not belong to their NSE, attempting to exclude them from CBT. Conversely, Ejido 20 de Noviembre demonstrated a high level of engagement among men and women in CBT as well as in traditional economic activities.

These factors shaped the trajectories of tourism-based SSE constructions, described in the following sections.

5.3 Chunyaxche: The Paradox of CBT Success and SSE Confinement

This story shows the paradoxical trajectory of Chunyaxche that although having the most financially successful CBT sector of the three researched communities, it generated the least gains from CBT for CLPs. The failures of T4D and the fragmentation of its *ejidal* organisation due to the influence of external actors -that encompass tourism facilitators, government authorities and external investors- confined the SSE to the CBT and inhibited the pursuit of CLPs, despite the economic success of this community tourism sector.

Chunyaxche is highly praised by tourism facilitators, government official, and tourism intermediaries due to its tourism "success", quantified in tourism influx towards Muyil's archaeological site and Sian Ka'an's NPA. This praise is directed to Aluxes, the only CBO benefitted with T4D resources, and that is considered a role model for indigenous organisations. This cooperative is praised for its corporatisation, its horizontal integration (it offers transportation, food and beverages services and other tourism facilities to its customers), its growth in terms of economic gains and jobs created and clients, its numerous environmental certifications and the quality of its services (UNDP, 2012, Sustentur, 2017). Nevertheless, the lack of inclusion of the rest of the tourism CBOs in the tourism network Maya Ka'an and their disengagement of T4D initiatives, as well as the exclusion of most of the community's residents in CBT and the high level of poverty present in this region is disregarded.

T4D failures resulted in the exclusion of the majority of residents from CBT, which was exacerbated in Chunyaxche. Members of the community lost control of the land on which the main tourism attractions are located: the Muyil archaeological site and the NPA with its lagoons and channels. The INAH (National Institute of Archaeology and History) regulates the archaeological site and, through mandatory certifications and permits, limited the number of people who can work as guides and prohibited the entry of local artisans who wish to commercialise their crafts. While CONANP (National Commission for Natural Protected Areas) regulates the NPA, it also restricted the number of CBOs that can operate there, limited their growth, and prohibited the entry of local artisans and PEOs that could provide food and beverages to tourism workers and visitors (CONANP, 2014, INAH, 2018).

The extreme fragmentation of Chunyaxche's *ejidal* organisation precluded the observation of evidence of a SSE or if the community's social and economic relations were guided by values of reciprocity and solidarity prior to the creation of Sian Ka'an's NPA in 1986. This fragmentation is linked to the size of the *ejido*, which encompasses more than 600 inhabitants, making communal organisation extremely challenging. This was exacerbated by the influence of external investors drawn to Chunyaxche because of the community's proximity to Tulum. The decimation of the traditional livelihood strategies fostered the commercialization of *ejidal* rights, allowing external investors to advance their own projects, which frequently jeopardised the community's well-being.

However, despite these factors, I observed evidence of the construction of the SSE confined to CBT. The implementation of solidarity practices was limited to the relations of the tourism CBOs, the *ejido* members that control access to the lagoon, the PEOs that provide meals to the tourism workers and the mechanical workshop that maintains the CBOs' boats. As I detail in section 7.4.1, tourism CBOs established solidary agreements to reduce conflicts among them. This fostered the implementation of solidarity practices into tourism provision, and entailed creating a work rota to prevent conflict, the standardisation of their tourism services, prices and cap to discounts.

To avoid unfair competition, the CBOs established a rota to take turns to sell the boat tours to the independent tourists that arrive to the lagoon area. The rota contemplated the size of the fleet per CBO and therefore, the biggest CBOs had two turns in a row and then, the small cooperatives had one turns each. While it might seem unfair, the small organisations consider it was useful as due to the size of their fleet they could not cover more turns in a row. With the implementation of the rota, members of the different tourism CBOs showed a solidary behaviour as they all supported each other to close the sales even if the income was going for a different cooperative. The work rota is shown in Figure 5-1.

Figure 5-1 Chunyaxche's CBOs work rota

CBO	Fleet Size	Partners	Number of turns per rota
Uyo-ol-Che Maya	8	4	2
Aluxes (financially-benefitted)	7	30[7]	2
Permit Holder	1	1	1
Cape' Cheen	1	5	1
Total	**17**	**40**	

[7] Twelve partners integrate this cooperative, seven of the partners work in the cooperative, and they generate other 23 jobs (in total it pays the salaries of 30 people).

To attract tourists throughout the year, the community's largest CBO formed alliances with various tourism intermediaries - tour operators and independent tour guides. These intermediaries combined the CBO's tourism offering into a package that included a tour of the Muyil archaeological site and walks along the NPA's interpretive trails. However, these alliances entailed intermediation costs, and the tourism CBO sacrificed earnings in exchange for a constant tourism inflow. Tours sold through intermediaries were considered reservations, and were not included in rota. Therefore, in addition to tours sold through their intermediaries, the cooperative could sell tours directly to independent travellers. As I discuss in Section 7.5.3, the financially-benefitted CBO could directly reach the tourism market by advertising in small hotels in Cancun, Playa del Carmen, and Tulum. Along with the boat tours, this cooperative offered packages, which included return transportation, breakfast and lunch at their installations, a tour to Muyil archaeological site, and walks on the interpretive trails. The community's smaller CBOs relied entirely on independent travellers who arrived at the NPA, as they rarely worked with tourism intermediaries.

5.3.1 Distribution of the tourism economic spill over in Chunyaxche

The distribution of tourism earnings was limited, as this new income was distributed only between the members and workers of the tourism CBO, their NSE, and the few PEOs that provided meals to tourism workers, petty trade, and repair of the boats' engines. The rest of the community's inhabitants performed survival agricultural activities and did not participate in CBT.

The first residents in the community to benefit from tourism were tourism workers and partners. The financially-benefitted CBO pioneered waged labour relations, which were emulated by the community's other three tourism cooperatives. Despite that waged labour contravenes the principle of "no exploitation," which is a component of the SSE's guiding practises (Coraggio, 2011b), these jobs provided better working conditions than those available in the main tourist destinations. Additionally, these jobs were reserved for the community's Mayan residents. Workers of the tourism CBOs indicated that in the nearby tourist destinations, like Cancun, Playa del Carmen and Tulum, they could only access jobs that paid the minimum wage of $100 Mexican pesos (MXN) daily. However, in Chunyaxche, they could earn between $200 - $250 MXN per boat tour, meaning that they earn over $1,000 MXN per day during high tourism seasons. However, during low tourism seasons, these employees could risk not making money if they did not received visitors.

Figure 5-2 shows the composition of the prices and costs of the tours of one of the small cooperatives in the community of Chunyaxche. This cooperative offers the best working conditions to its employees, as it pays the highest salary per tour, as well as other benefits such as daily lunch of workers. However, price and cost composition of the tours is similar to the other CBOs. The four tourism CBOs offer two tours; the *Xlapac* tour consist in a two hours boat tour through the channels of Chunyaxche, swimming in one of the channels, visit to a small archaeological site and walking in an interpretative trail in the channels. The *Pez Maya* is a four-hour boat tour that includes the activities of *Xlapak* tour in addition to a visit to the littoral area of Sian Ka'an, and crocodile sightseeing in the mangroves. The *Xlapac* tours has a price of $700 MXN per person and at least two people must take the tour, and the agreed cap to discounts of this tours per person is up to $50 to $100 MXN. The *Pez Maya* tour has a cost of $6,000 MXN per boat, and the cooperatives do not offer any discounts on this tour due to the costs.

Figure 5-2: Price and costs composition in MXN of boat tours in Chunyaxche

Concept	Xlapac (2 hours boat tour) Price composition			Pez Maya (4 hours boat tour) Price composition			Notes
	Unit cost	Pax / Units	Total	Unit cost	Pax / Units	Total	
Price per person	700.00	2	1400.00	6,000.00	1	6,000.00	Xlapac requires minimum two passengers per tour. Price of Pez Maya Tour is per boat, maximum 6 visitors.
Total Income			**1400.00**			**6,000.00**	
Direct costs & expenses							
Crew wages (per tour)	250.00	2	500.00	500.00	2	1,000.00	Wages are per tour. These oscilate from $200 to $250 for the Xlapac tour and from $300 to $ 500 for Pez Maya.
Duty fees for entering the NPA	75.00	2	150.00	75.00	6	450.00	
Gasoline	200.00	1	200.00	450.00	1	450.00	
Total costs & expenses			850.00			1,900.00	
Gross Profits (GP)			**550.00**			**4,100.00**	
Cooperative fee (% over GP)	50%		275.00	50%		2,050.00	Most cooperatives require a fee of 50% over gross profits. CTSK requires a fee of 70% over GP
Net profit			**275.00**			**2,050.00**	
Other expenses							
Transportation costs (partner)			150.00			150.00	Amount oscilates between members of the cooperatives
Food for workers			75.00			75.00	Not all cooperatives pay workers' lunch
Total other expenses			**225.00**			**225.00**	
Final profit			**50.00**			**1,825.00**	Final profits per type of tour are calculated considering the CBOs sell only 1 tour per day. Small CBOs can sell from 0 to 4 tours per day.

The price and cost composition of the tours demonstrates how the distribution of tourism economic gains favours the tourism worker over the cooperative partners' profits in cases where they operate at a minimum capacity.

It is important to highlight that the corporatisation of the financially-benefitted CBO diminished its social purpose[8] and therefore, this cooperative distribute the least its earnings between its partners. The members of this CBO only distribute 30% of their profits in comparison to the 50% that the rest of the cooperatives share.

Despite the limited profits they obtain with the boat tours, the four CBOs indicated that they are not willing to increase their prices as they are competing with big companies such as *Xcaret* Park, which charges entrance fees of $2,500 MXN (£80) per person but offers a whole day experience with multiple attractions and services –with additional costs-. CBOs already find resistance from the tourists that reach the area, as they come to the NPA expecting reduced prices as the CBOs are led by Mayan indigenous people.

The fees charged by INAH for the entrance to the archaeological site of Muyil are managed by this institution and the only income that remains in the area is to maintain the site. However, the *ejido* council managed the income from the entrance fees to the interpretative trails and parking in the NPA, and these are shown in figure 5-3. These tourism earnings are used to pay the wages of the *ejido* members that work controlling these spaces as well as for the areas' maintenance. Additional earnings obtained from these fees are used to improve the conditions of the Ejido of Chunyaxche. My conversations did not allow me to obtain quantities of the amount of tourist that pay these fees, however for the interpretative trails, I estimated that the amount of visitors do not exceed the NPA's limit of 108 visitors per day.

Figure 5-3: Ejidal income from CBT

***Ejido* fees**	**Price per person**
Parking lot	50.00
Access to NPA through parking lot	20.00
Interpretative trails (Independent Travelers)	50.00
Interpretative trails (Tour operators)	45.00

Each cooperative take monthly turns to maintain the cleanliness of the common areas in the lagoon. This consists in paying the salary of one *ejidatario* that cleans the toilets and the area, the maintenance of a water pump and the cost of its functioning and toiletries. The small CBOs indicate they think this is unfair since the biggest cooperatives generate more load and therefore,

[8] The purpose of social organisations is to enable the sustainable livelihoods of its members, instead of accumulating capital JOUAULT, S. G. D. F., ANA. RIVERA, TLACAELEL 2015. Un modelo regional de turismo alternativo y economía social en la Península de Yucatán, México. *Otra Economia, Revista de Economia Social y Solidaria,* 9**,** 164-176..

expenses. Nevertheless, the partners of these organisations indicated that they prefer to maintain the current arrangements to avoid generating conflicts with the big CBOs.

"It is not fair, that we all equally take care of this area (common area in NPA), because they get more people and they generate more waste (…) but we all agreed and I don't want to have problems with them, it is ok (...)" (...)"

This statement shows the power struggles among the members of the tourism CBOs, and while it contravenes the principle of distribution of gains according to needs and labour, it shows the development of a mild SSE.

5.3.2 Integration of a CBT value chain in Chunyaxche

The lack of governmental programs to foster traditional economic activities such as agriculture, and the prohibition of fishing and timber -due to the creation of the NPA of Sian Ka'an-, exacerbated the marginalisation of the rest of inhabitants of the community excluded by T4D initiatives. Due to their high level of poverty, the *ejidatarios* are selling their land and *ejidal* rights to private investors, interested in the community because of its proximity to the consolidated tourist destination of Tulum. The entrance of external investors displaced the local inhabitant that pursue other economic activities such as the commercialization of crafts and provision of food and beverages. Local inhabitants do not have the resources or access to credit to create ventures that can compete with the big new businesses, which attract the tourists that visit Chunyaxche.

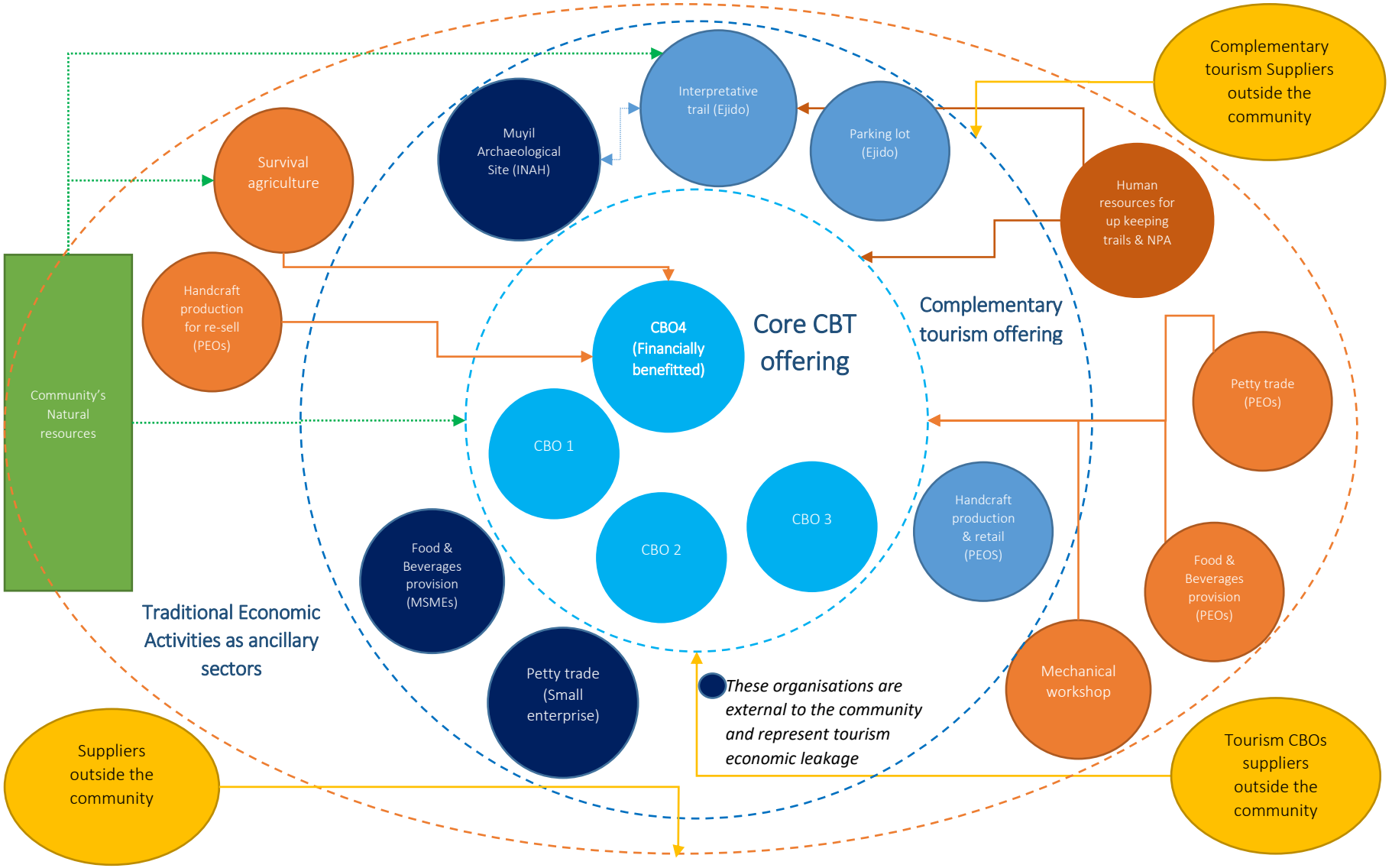
Through participant observations, interviews and participatory network diagrams of economic interactions it was possible to determine that both, tourism CBOs and PEOs, get all of their supplies in the nearby urban centres; Tulum and Felipe Carrillo Puerto and in few cases they even get their supplies from other states like Yucatan. While some restaurants and food and beverages vendors acquire vegetables and fruits produced in the community, they still acquire the majority of their inputs in the nearby urban centres. There is no space to integrate more inhabitants of the community of Chunyaxche in CBT as the restrictive regulations preclude their entrance to the NPA, where tourists remain during their visit to the area.

Collective efficacy in this community is almost inexistent. The only integration of the tourism offering consists in "packaging" the archaeological site, the interpretative trails and the boat tours, but it is mostly done by tour operators or independent tour guides. The added value generated from this integration does not stay in the community as these earnings go to the urban centres where these stakeholders operate. Within the community, the only integration

occurs with the PEOs that provide food and beverages to the partners and employees of the CBOs.

Figure 5-4 shows the current situation of a CBT value chain in the community. It shows a lack of integration of the traditional economic activities performed in the community as supplementary sectors to CBOs. It also shows a high participation of external actors into the provision of complementary tourism services, and in consequence, a lack of integration of these services into CBT.

Figure 5-4: Integration of a CBT value chain in Chunyaxche



5.3.3 Pursuit of Community Life Projects in Chunyaxche

Neither participant observation, interviews with the residents of community nor informal conversations revealed information related to communal programs that suggested the active pursuit of general CLPs. However, tourism CBOs were joining efforts to force CONANP to expand the dock. Additionally, members of tourism CBOs were diversifying their livelihood strategies by creating PEOs dedicated to petty trade.

5.4 San Felipe: Cooperativism as SSE principle

This story illustrates how the cooperativistic values that underpin the main traditional economic activity in this community –fishing- transferred to CBT and created a SSE foundation. Additionally, the lack of influence of tourism facilitators and therefore, a minimum impact of T4D failures resulted in the inclusion of a broader population into their popular economy through the creation of PEOs that complemented the main tourism offering. Due to a lack of adequate training to provide tourism services, residents of these communities cooperate much more than residents of other communities. These resulted in one of the most radical demonstrations of solidarity, as three tourism CBOs merged into a single organisation to pursue their CLPs.

Tourism facilitators overlooked CBT development in San Felipe, because T4D programs in Yucatan Stare focused mainly in fostering cultural tourism in indigenous communities. The only activity fostered by development programs in this community is fishing, which allowed most of its residents achieve a sustainable livelihood and self-sufficiency. Tourism in San Felipe is overshadowed by the nearby community of Rio Lagartos, famous for their boat tours to Las Coloradas, the world-famous pink lagoons located at the north of the Yucatan Peninsula. Despite that, San Felipe offers this tour in addition to transportation to three different points of interest to observe fauna; this community does not even appear on digital maps. Most of their visitors are inhabitants of nearby towns or tourists that get lost on the way to Rio Lagartos.

Thirty-two inhabitants in San Felipe pioneered CBT in this community when they established three tourism cooperatives to develop an alternative economic activity to fishing. Figure 5-5 shows the tourism CBOs that operate in San Felipe and the size of their fleets. However, the majority of the members of the tourism CBOs consider fishing their main economic activity, and only work on tourism during weekdays or during high tourism season. Only one of three tourism CBOs in this community is part of Co'ox Mayab tourism network, but the network's operator overlooked this organisation as it mainly focus on supporting indigenous communities that

implemented T4D programs. However, the members of the tourism CBOs received resources from CONANP to improve the beach area, the tourism dock and to build interpretative trails in the mangroves. CONANP also transferred part of the resources necessary for the acquisition and adaptation of the cooperatives' boats for tourism provision, which CBOs complemented with credits they received from their fishing cooperatives.

Figure 5-5: CBOs in San Felipe

CBO	Total Fleet	Total cooperative Partners
Punta Bachul	14	14
Alcatraz Tours	11	11
San Felipe y Naturaleza	5	7
Total boats	**30**	**32**

CONANP manages the NPAs that surround San Felipe, including the spots where the tourism amenities locate, restricting the integration of new tourism CBOs and limiting the number of tourists to the region. However, in this community, the regulations are not enforced as strictly as it happens in Chunyaxche, and the limited tourism influx towards San Felipe allows a sustainable production and consumption of CBT that does not jeopardises the local ecosystems.

Members of the tourism CBOs transferred the cooperativism values learnt from their fishing social organisations, compensating the lack of influence of facilitators and other external stakeholders. The principles applied in the formation of the tourism CBOs include voluntary adherence, democratic control and economic participation of partners, autonomy and independence cooperation between social organisations (Villalba Eguiluz and Pérez de Mendiguren, 2019). However, these organisations do not allow the adherence to new members to the cooperatives, or the entrance of external investors. These organisations also disregard the need of acquiring training to improve their tourist services and their social responsibility limits to maintain the cleanliness of the beach area.

5.4.1 Distribution of the tourism economic spill over in San Felipe

The application of cooperativism principles to CBT facilitated the development of the SSE. As I describe in section 7.4.2, the tourism cooperatives made agreements and established solidary rules to reduced conflict. In first instance, these cooperatives standardised the prices of the tours and made a rota to provide the tours. To sign in for the rota, the partners of the CBOs

arrive to the tourist dock between 6:30 and 7:00 am to indicate they want to work during the day and at 7:15 am, they make a raffle to allocate their number in the rota randomly. Due to the low tourism influx towards San Felipe, only a reduced number of partners of the tourism CBOs sign in for the shifts in the day, especially in weekdays and low tourism season. However, more members sign in for the work rota during weekdays and during high tourism season, although the interviewees indicated that at the most, a maximum of fifteen to twenty members sign in during the busiest days in the year.

The tourism CBOs offered six different boat tours with different prices. To equalize earnings among the members they decided that the sum of the net profits of the tours sold –except for the Flamingos and Coloradas tours and Sport Fishing tours- would be distributed equally among the members of the cooperatives that signed in for the day's rota. The composition of the prices of the tours in San Felipe are described in Figures 5-6 and 5-7. These figures show that the cooperative fee covers a small support for the captain that provided the tour, compensating for diesel's cost. During the weekends and during high season, tourism CBOs hired a secretary who supervised that cooperatives' members respected the rota; charged tourists; kept a record of the sales, cooperative fees and expenses and; distributed the earnings after expenses among the partners of the cooperatives that worked during the day. In case they did not have any earnings, the cooperatives paid the secretary $200 MXN, but in a "good day" they paid her $350 MXN plus tips.

Figure 5-6: Price composition of short tours in San Felipe

Concept	Playa Bonita (Transportation to beach island) Price composition			Tour Bahia (Tour round beach island) Price composition			Tour Kambulnah (Tour to waterhole at mangrove area & crocodile's watching) Price composition			Isla Cerritos (Tour to nearby island for bird's watching) Price composition		
	Unit cost	Pax / Units	Total	Unit cost	Pax (max)	Total	Unit cost	Pax (max)	Total	Unit cost	Pax (max)	Total
Price per person / boat	30.00	5	150.00	150.00	5	150.00	600.00	5	600.00	800.00	5	800.00
* Additional person	30.00			30.00			120.00			160.00		
Total Income			**150.00**			**150.00**			**600.00**			**800.00**
Cooperative fee												
Captain's wage / support	30.00	1	30.00	30.00	1	30.00	200.00	1	200.00	300.00	1	300.00
Cooperative fee	20.00	1	20.00	20.00	1	20.00	50.00	1	50.00	50.00	1	50.00
Total costs & expenses			**50.00**			**50.00**			**250.00**			**350.00**
Gross Profits (GP)			**100.00**			**100.00**			**350.00**			**450.00**
Other expenses												
Secretary's salary			200 -350	Per day, according to the amount of tours sold. Captains also provide a tip to the secretary								

The cooperative members decided to exclude the Flamingo and Coloradas tours, as well as Sport Fishing tours, from the rota because they believed it would be unjust to split the revenue from these tours equally among all partners who signed up for the day. The rationale behind this was that these tours can take more than 4 hours, and they had to consider the deterioration of the fishing equipment, the engine wear, and the cost of the diesel. Therefore, if the partner in turn sold one of these tours, he paid the cooperative fee and exited the work rota. This person would not collect the profits at the end of the day, as this individual would keep almost the total amount of the price of the tour.

Figure 5-7: Price composition of long tours in San Felipe

Concept	Tour Flamingos (long tour Ria Lagartos & Las Coloradas) Price composition			Sport Fisihing Tour Price composition		
	Unit cost	Pax (max)	Total	Unit cost	Pax (max)	Total
Price per person / boat	1,800.00		1,800.00			1,500.00 - 2,000.00
* Additional person	NA			NA		
Total Income			**1,800.00**			**1,500.00 - 2,000.00**
Cooperative fee						
Captain's wage / support	0.00	1	0.00	0.00	1	0.00
Cooperative fee	50.00	1	50.00	50.00	1	50.00
Total costs & expenses			**50.00**			**50.00**
Gross Profits (GP)			**1,750.00**			**1,450.00 - 1,950.00**

5.4.2 Integration of a CBT value chain in San Felipe

The members of the tourism CBOs began to work in solidarity with other PEOs, and local micro and small enterprises that offer complementary tourism services, strengthening the community's tourism offering. Members of the tourism CBOs offered food and beverage service provided by the local businesses with their tours, or the delivery of food to the tourists that stayed in the beach. Another form of integration was recommendation of local restaurants and places to eat in the community. Additionally, tourism CBOs' members recommended or rented rooms, houses and *palapas* to tourists that seek temporal accommodation in the community. The properties they suggested were owned by their NSE. They also recommended local retail businesses such as petty trade stores and pharmacies.

The municipal government provided funding for the construction of toilets in the beach area, and labour was provided by the CBOs' partners and their NSE. The municipal government organised quarterly beach cleaning days and paid participants' wages. The municipality requested assistance from tourism CBOs in transporting volunteers to the beach area, and from

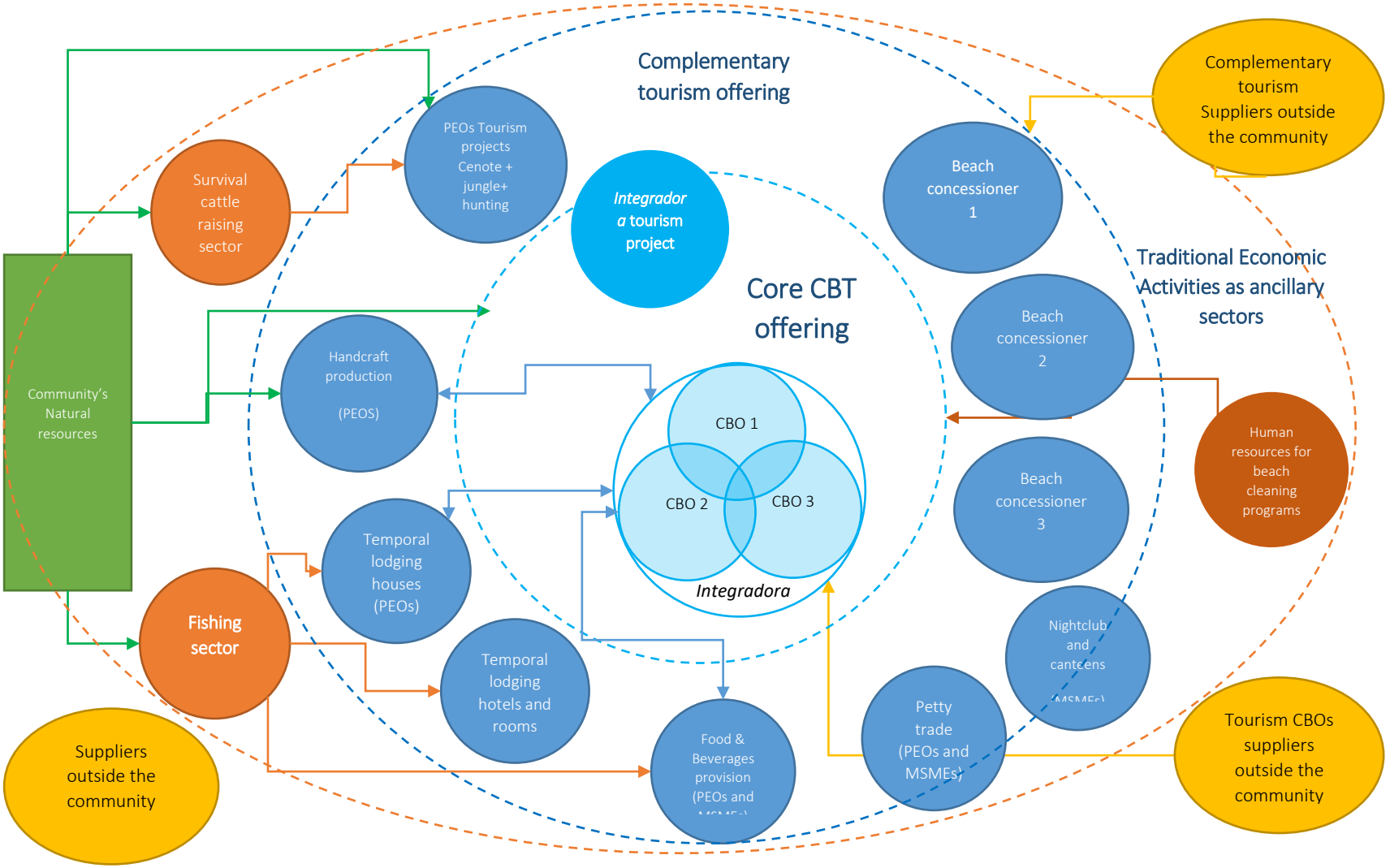
the community's largest businesses requested food and beverage provision for the participants. By doing so, the government enabled tourism to become a source of income for a greater proportion of San Felipe's residents.

However, solidarity does not extend to everyone in San Felipe, as does considered outsiders (e.g. without links to NSE tourism partners or who do not belong to fishing cooperatives) are excluded from tourism. An example of this is the exclusion of PEOs operating in the beach area, which are constantly under pressure from tourism CBOs to close their operations. This PEO was created by some of San Felipe's poorest residents who have no ties to the tourism partners' NSEs. Despite that, this PEO obtained governmental authorisations to engage in retail trade, provision of food and beverages, and the rental of beach beds, it remained excluded from CBT and the SSE.

Additionally, both anglers' cooperatives and tourism CBOs indicated that they had conflicts with one another because anglers occasionally use their boats to give tours to their families and friends who live in other towns when they visit San Felipe. While anglers assert their right to use their boats for personal recreation and network purposes, members of tourism CBOs view this as unfair competition. Anglers lack the necessary permits to conduct tourism activities, and the community's tourism CBOs believe that all visitors should use their services to visit the beach or practise fishing for leisure.

San Felipe’s CBT value chain is shown in Figure 5-8. This figure shows that there are stronger economic interconnection between CBOs, PEOs, and other businesses in San Felipe. This community integrated a broader population into CBT with the strengthening of the popular economy and inclusion of the traditional economic activities into their supply chain. However, CBOs get the majority of their fishing supplies at the closest urban centres, Tizimín, Merida and Cancun. Restaurants and food providers are able to obtain an important quantity of their inputs from the local fishing cooperatives and cattle raisers. This represented a tourism economic leakage.

Figure 5-8: Integration of a CBT value chain in San Felipe



5.4.3 Pursuit of Community Life Projects in San Felipe

The tourism CBOs' solidary organisational structure facilitated the consolidation of the three cooperatives into a single organisation, which they refer to as "*Integradora*." The cooperatives' partners anticipate that this consolidation will increase their visibility before the state government and obtain funding for the following projects:

- Inclusive beach: enable beach area with roads to facilitate access of people with motor disabilities.
- Recovery of the marine reserve for snorkel and trolling fishing.
- Recovery and maintenance of Isla Cerritos to improve bird watching.
- Construction of a tourist centre with villas, traditional houses, parking lot, and a venue for multiple usages.

The partners of the "*integradora*" are in the process of obtaining a twenty-year concession on a terrain next to the tourism dock where they aim to build the tourist centre, but they are struggling to obtain funding or credits to initiate its construction. Currently, this space has a palapa for hosting events that the municipal government or different NGOs organise. During data collection, the municipal government held a Festival of Mero fishing veto, with the purpose of supporting anglers during the veto season of this fish by attracting visitors to the community and generate income to the tourism CBOs, and PEOs and businesses that provide tourism services.

Figure 5-9 Festival of Mero Fishing Veto

For this event, the Municipal Government made a call inviting artisans of the state of Yucatan to buy a space in the Festival and sell their crafts and products to the visitors. These stands appear -in figure 5-9. Local artisans felt displaced and considered that this action disregarded their best interests as they considered that competition with external actors is unfair. Local artisans, mostly friends or family members of the tourism CBOs, were the first people in the community

that were integrated into the tourism sector. Nevertheless, local artisans were able to show their crafts outside the venue where they normally commercialize their products without incurring in additional costs, as seen in figure 5-10.

Figure 5-10: San Felipe's local artisans commercializing their crafts and goods

The cooperative culture that prevails in San Felipe facilitated the union of members of anglers and tourism CBOs, PEOs, and micro and small enterprises, and through collective action, they have deterred private investors from entering the fishing and tourism sectors. Members of tourism CBOs indicated that their opposition is justified because establishing CBT required a significant investment of resources and time, and these members believe it is unjust for investors to benefit from their experience without compensating them or potentially excluding them. Section 7.3.1 expands on this subject.

However, tourism CBO members supported tourism projects initiated by members of their NSE as long as they do not compete directly with their boat tours. A cattle rancher, for example, expressed interest in developing some tourism amenities in his property, including access to a cenote for swimming, snorkelling, and diving; construction of a palapa to serve food and beverages; tours to mangroves for crocodile sightings and; deer and quail hunting. Nonetheless, he has not obtained funding due to the lack of T4D initiatives for San Felipe.

The empirical findings in Section 5.4 imply the existence of collective efficacy between tourism CBOs and PEOs, thereby strengthening San Felipe's CBT sector. Through their current tourism offering and ongoing initiatives, these actors expect to shift their tourism market from one-day visitors towards overnight visitors. Tourism CBOs are forming alliances with "Fair-trade" tour operators to establish new connections with the Yucatan and Quintana Roo tourism markets. Additionally, they are working to increase the community's visibility on digital maps such as Google Maps. This demonstrated the application of solidarity values to exchange, which, as expanded in Section 7.5.3, strengthens the SSE.

San Felipe's CBT sector stimulated the municipal government's interest in developing a tourism development plan that aims to achieve four goals. First, improving client service through service quality and English language training. Second, improving and maintaining the traditional local urban image, that entails colourful wood houses. Third, allocate resources for improving overall infrastructure, including the tourism pier, roads, and signs. Fourth, eliminating selfishness and strengthen social capital to foster the inclusion of more residents into CBT.

5.5 20 de Noviembre: CBT Adaptation to *ejidal* organisation for CLPs

The Ejido 20 de Noviembre is another paradoxical example, where CBT did not generate the economic gains expected by the tourism facilitator to be considered as a success, but its residents adapted CBT to their livelihood strategies and enable the fulfilment of CLPs. According to the tourism network Visit Calakmul, 20 de Noviembre's CBT sector generated $7,775.00 MXN -less than £280- in 2018. However, this community adapted successfully CBT to their *ejidal* organisation. Because the *ejido* controls access to the Rio Bec archaeological site and the voluntary NPA, all residents of the community have an equal opportunity to access their natural resources and provide tourism services and products. This facilitated the construction of the SSE and the fulfilment of CLPs, some of which entail the participation of residents from other communities within the municipality of Calakmul.

Solidarity values guided the social and economic relations of the inhabitants of the *ejido* before the implementation of CBT. Every member of the community participates in communal work denominated "*faginas*" to maintain the wellbeing of the community and its population. These tasks include maintenance of the cleanliness of the roads and green areas, managing waste, collaborative labour to improve housing of the families in most need, management and distribution of water to households during draughts, among many other activities:

"We all work as a team to take care of our community (…) this time my task is to help with the burning of the waste, that is why we are cleaning now. (…) Others take care of the roads (…). Because of tourism all the families keep their (farm) animals inside their properties, (…) previously they were wandering around the community, but it was not good for our visitors (…) now we have a clean community."

An important finding in this community is the integration of women to CBT. In the communities of Chunyaxche and San Felipe, men dominate tourism. However, in 20 de Noviembre, women led the artisan workshops, while men dedicate to their traditional activities, but they also contribute to CBT with labour. CBT gains helped community groups to increase their incomes, however, these did not allow them to surpass from survival to sustainable livelihoods.

5.5.1 Distribution of the tourism economic spill over in Ejido 20 de Noviembre

During implementation of CBT, the facilitator imposed different requisites and regulations that precluded the entrance of a broader population and excluded others. However, due to the high marginalisation of the community, these requisites were less stringent than in Chunyaxche as these did not forced the adoption of specific forms of organisation of work –unlike Chunyaxche- or the formal register of the organisations before the Ministry of Treasury. This fostered the organisation of a greater number of CBOs in the *ejido*, in total eight community groups operate that economically integrate 58 people, in comparison to the four cooperatives in Chunyaxche that employ 40 people and three in San Felipe that involved 32 members, as presented in Figure 5-11. This is important, as this is the smallest community in terms of population. These CBOs are able to integrate additional households to their workshops when they needed to increase their production, being this to present their crafts in municipal artisan fairs or supply wholesale vendors.

Figure 5-11: Total CBOs in 20 de Noviembre

Name	Workshop	Total members
Tuumben Kaab	Beekeeping	10
Amanecer de Rio Bec	Embroidery	5
Hilos de Vida	Embroidery	4
Las Amapolas	Embroidery	8
Aranas tejedoras	Hammocks	6
Neek Ich Che	Seed crafts	4
Chac Tunich	Stone crafts	7
Artesano Sabio	Wood crafts	10
Kaanan Che	Wood crafts	4
Total	**9**	**58**

As illustrated in Figures 5-12 and 5-14, all of the workshops produced a wide variety of crafts to satisfy the varying demands of their visitors. All of the workshops created low-priced items to secure minimum sales or increase the frequency of their sales. While the majority of the tourism CBOs did not disclose their production costs, they indicated that they had received cost and pricing training, which enabled them to establish prices that accounted their costs, indirect expenses, and wages. All workshop participants interviewed indicated that this training empowered them to accurately value their labour, the worth and uniqueness of their crafts, and thus to negotiate fair prices with wholesale retailers interested in commercialising their products in their stores.

Figure 5-12: Price range of the crafts produced in 20 de Noviembre

Concept	Crafts		
	Range of prices		
	Minimum	Maximum	Description
Crafts prices			
Honey beauty and hygiene	50.00	200.00	Low-priced items include soaps, small bottles with melipon honey. Top-priced items are facial creams, eye-care honey serums, and large bottles of melipon honey.
Embroidery crafts	30.00	850.00	Low-priced items include bracelets and small bags. Top-priced items are blouses or shirts made with fine fabrics and threads.
Hammocks	250.00	1,800.00	Low-priced items are small beach bags made of silk threads. Top-priced items are double-size hammocks.
Seed crafts	20.00	300.00	Low priced items are key chains, or little dolls. Top-priced items are accessories with seeds and semi-precious stones
Stone crafts	50.00	500.00	Low-priced items are small stone archaeology replicas. Top-priced items are elaborated large replicas such as masks (made on demand).
Wood crafts	50.00	thousands	Low priced items include kitchen utensil. Top-priced items can be artistic pieces made on demand.

To prevent unfair competition between workshops that produced similar crafts they implemented some differentiation of the products. The embroidery workshops used different embroidery techniques, materials and arts. The wood workshops differentiate their offer by using different inputs and finishes; Artesano Sabio uses wood considered as waste by the sawmill and recycle it into crafts, while Kaanan Che waxes their pieces to differentiate them.

The only workshop that has not adjusted their retail prices is Aranas Tejedoras, the hammock workshop; these are presented in figure 5-13. Their main crafts are single and double hammocks, but these items are expensive for the average visitor of the community and therefore, they refuse to pay the full price ($1,200 and $1,800 MXN). The members of this workshop are forced to make discounts on their prices to close sales, sacrificing the cost of their labour. During data collection, it was possible to observe that the members of Aranas Tejedoras had to reduce the price of the double-sized hammocks from $1,800 to $1,200, but they were able to sell three hammocks. The leader of this workshop indicated it was better to sacrifice their wages, as they have not sell a single item in a period of three months as I detail in section 7.5.3.

Figure 5-13: Price composition of Hammocks

	Single Hammock Price composition			Double Hammock Price composition		
Concept	**Unit cost**	**Unit**	**Total**	**Unit cost**	**Pax (max)**	**Total**
Price per person / boat	1,200.00	1	1,200.00	1,800.00	1	1,800.00
Total Income			**1,200.00**			**1,800.00**
Costs						
Silk Threads	30.00	6	180.00	30.00	10	300.00
Labour (day of work)	100.00	10	1,000.00	100.00	15	1,500.00
Total costs & expenses			**1,180.00**			**1,800.00**
Gross Profits (GP)			**20.00**			**0.00**

Figure 5-14: Crafts produced in Ejido 20 de Noviembre

The tourism CBOs also offer training to tourists to teach them their crafts. The embroidery workshops consists in needlepointing a small bag with a traditional icon of Calakmul (normally birds). In the stone workshops, the activity consists in carving a small craft in limestone, but since the activity requires a minimum knowledge, this training has to be requested. The wood workshops normally do not provide training as these involve managing large equipment, but if requested they can provide the activity. The hammock workshop does not provides this activity as elaborating a hammock takes more than 10 days and a small bag can take up to eight hours of work. The seed workshop consists in replicating any of the small crafts the CBO produced, being these small seed dolls, bracelets or necklaces. The activity in the beekeeping workshop consist in a welcome activity in Mayan language, then an explanation of the Melipona bee, the

medicinal properties of the honey, a description of the "*jobon*" (where the bees produced the honey), how they maintain the health of the bees and a display of the products they make with the honey. Figure 5-15 illustrates some of these workshops.

Figure 5-15: Workshops in 20 de Noviembre

The price of each workshop varies according to the CBO. The prices range from $120 to $200 MXN, with the network keeping 5% of the price to cover the operation costs of the visitors centre (CIT). The goal is for these fees to eventually cover the costs of operating the CIT, which is currently funded by the facilitator and municipal government. When a visit to the *ejido* is made through Visit Calakmul, the network offers a "tourism package" that includes participation in two workshops, a visit to the beekeeping workshop, lunch, and a guided tour of the remaining artisan workshops and the palapa where artisans display their work. This day of activities is priced $765 MXN per person.

Figure 5-16: Tourist Information Centre (CIT) in Xpujil

Apart from CBOs, the *ejidal* organisation offers archaeological tours of Rio Bec. They utilised timber-related transportation equipment that encompassed seven quad bikes, a few motorcycles, and a pickup truck to take tourists to the site. Because the *ejido* controls access to Rio Bec, they obtained revenues from fees charged to visitors to the archaeological site. These gains are redistributed to residents as wages for the 10 to 12 people employed for cleaning and maintaining the site. Two other residents are certified archaeological guides, and each owned two quad bikes and offer private tours of Rio Bec. They charged the same rates as the *ejidal* council and paid fees for the maintenance of the site. When either the *ejidal* organisation or the local independent guides required additional quad bikes or transportation equipment to take large groups to Rio Bec, they joined resources to provide the necessary transportation and guiding services. The costs of the archaeological tours are detailed in figure 5-17.

Figure 5-17: Prices of Archaeological tour to Rio Bec

Concept	Archaeological Tour Rio Bec Price composition Price per unit	People
Quad Bike	800.00	1
Motorcycle	400.00	1
Pick-up truck	1,000.00	* per group
Costs		
Tour guide	250.00	1

Interviewees did not disclose the costs of the archaeological tours, however, they indicated that the tour guide receives the payment of a "*jornal*" (a day wage) paid at $250 MXN. The difference of the payment is collected by the *ejido* to cover the costs of diesel or petrol and for the payment of the people hired to clean the archaeological site, who receive one *jornal* as payment. Independent guides pay $70 MXN to the *ejidal* organisation for each tourist they take to the site. The *ejido* does not make the 5% contribution for the maintenance of the CIT, because this archaeological site is not promoted by the network Visit Calakmul. This is because INAH has not recognised this site –because of budgetary constraints- and therefore, the network cannot commercialize the tours, as only the *ejido* residents have authorisation to do so.

Figure 5-18: Tour to Archaeological site of Rio Bec

5.5.2 Integration of a CBT value chain in Ejido 20 de Noviembre

Integration of a CBT value chain was triggered with the universalisation of access to new information in this community, a topic that I expand on section 5.6.2. Members of the CBOs trained themselves to use the equipment and share their experiences and knowledge to the inhabitants that want to establish new tourism ventures in the community. Additionally, the tourism facilitator allowed the participation of the inhabitants of the whole community in the training organised to improve the tourism CBOs, because equal access to knowledge was

expected by the inhabitants of the *ejido* and this strengthened trust between the community and the facilitator. Even children of the inhabitants of the *ejido* are able to participate in training, such as English courses. While the operator of the tourism network Visit Calakmul indicated that the English courses are focused on sales, children are the most interested in this course:

"We provided English classes in the Ejido, (…) the course was for the members of the groups (tourism CBOs) so they can sell their crafts to foreigners, but the children are the ones that take the classes (…). Some adults go, but is mostly the kids. (…) We continue giving the training, we hope the adults go, but it's good that the children take advantage of them (…)"

Despite this, English courses continue to be delivered in the communities and the tourism facilitator is constantly encouraging adults in the community to engage in this training so they can sell crafts to foreign visitors.

Access and transference of knowledge not only comes from the facilitator or the members of the *ejido*, knowledge also comes from the visitors and it is adopted by the members of the CBOs. A French group of scholars "discovered" and recovered the archaeological site of Rio Bec. These scholars hired several inhabitants of the community to help them dig Rio Bec and shared their findings with the community. The French scholars taught the inhabitants of the *ejido* the history of Rio Bec and gave them all the photographic files of the digging of the site so they could share this information with the visitors.

The embroidery workshops designed their training from the requests of a group of visitors to the community, but other workshops have benefitted from the expertise of their visitors, theme that I detail in section 7.3.3. In case of the stone workshop, they indicated that they received a group or art students that taught them techniques to improve their craft. Wood workshops indicated that they received a group of Finish students that taught them to improve their use of their equipment and encouraged them to create artistic pieces. This improved their artisan techniques, and offset their need to access strategic training to improve their artisanship.

Equality does not limit to access to knowledge in this community but extends to the territory and the infrastructure. Any inhabitant of the ejido that wants to show and commercialize their products can use the palapa built by the facilitator for the CBOs to display their handcrafts. The only condition is that they have to participate in the work rota to manage the palapa. However, the gains are constrained by the low tourism influx towards the community.

Figure 5-19: Palapa for display of crafts in 20 de Noviembre

The implementation of solidarity practices in their economic processes propelled collective efficacy in the community and a broader integration of more households in tourism. In addition to the redistribution of the CBOs workload between other artisans that do not belong to the CBOs, the *ejido* propels the inclusion of more households in the services of temporal provision of food and beverages and temporal accommodation to tourists that requests these. In case of provision of food, this is provided by families in the workshops or at a household with a specific family. The cost of this service during my data collection was of $70 MXN per person per meal.

Figure 5-20: Provision of Food and Beverages in 20 de Noviembre

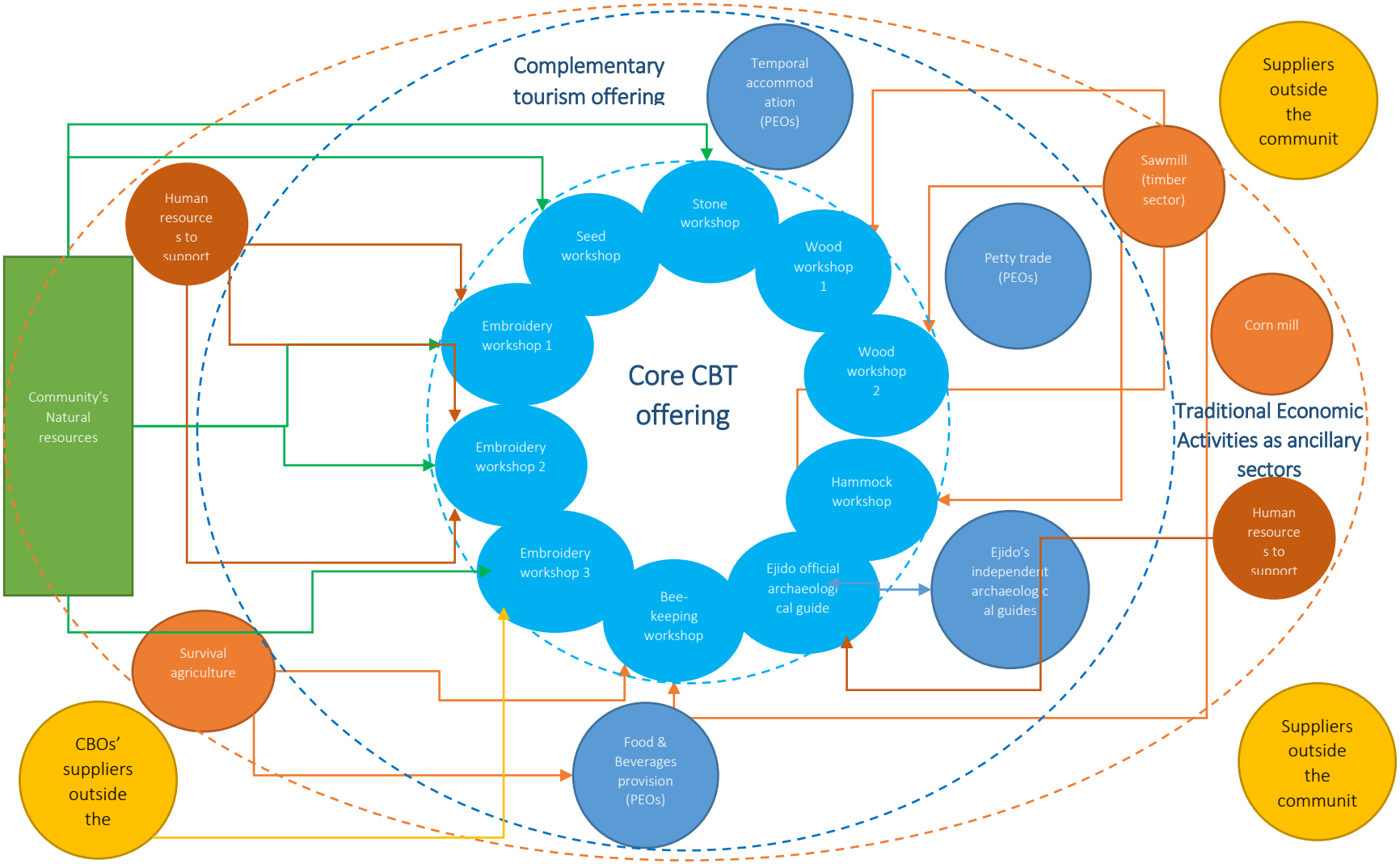
The households that provide accommodation as those who have rooms with beds –instead of hammocks- and bathrooms –instead of latrines- to offer the conditions to make a comfortable stay for their visitors. To adapt their houses to these conditions, households receive resources from the *ejidal* organisation and governmental programs, and members of the *ejido* collaborate with labour for the construction.

Figure 5-21: Example of temporal accommodation in 20 de Noviembre

Figure 5-22 depict the integration of a CBT value chain in Ejido 20 de Noviembre. In comparison to the cases of Chunyaxche and San Felipe, this value chain shows a stronger interconnection between tourism CBOs, PEOs and their traditional livelihood strategies. It shows a more complete tourism offering that includes complementary services like temporary accommodation and provision of food and beverages that is distributed between different households in the community. Like San Felipe, Ejido 20 de Noviembre maintains its self-sufficiency through their traditional economic activities; survival agriculture and timber, which are integrated in their CBT activities.

Similarly, to Chunyaxche and San Felipe, the economic gains from CBT leaked outside the community, as many workshops and household have to acquire part of their inputs in the nearby urban centres –Xpujil, Campeche and Chetumal-. However, since the crafts of the stone, seeds and wood workshops require mainly the natural resources available in the communities, they are able to circulate their gains among the local PEOs and use their natural resources.

Figure 5-22: Integration of a CBT value chain in 20 de Noviembre



5.5.3 Pursuit of Community Life projects in Ejido 20 de Noviembre

By conversing with various inhabitants of the Ejido 20 de Noviembre I realized they had many collective projects in process that would enabled the fulfilment of their CLPs. These projects include the construction of a museum, preparation to offer hunting tourism in their community, increasing their capacity to offer temporary accommodation, and collective actions to delay the entrance of external investors to their community.

The members of the *ejido* were interested in building a museum to protect and show their ancestral knowledge and archaeological patrimony to their visitors. Their interest was triggered by the fact that the French scholars that helped to dig out Rio Bec robbed many archaeological artefacts discovered in the site. I heard numerous statements from almost all my interviewees regarding this issue that were similar to the following:

"The French academics hired many of us to help digging Rio Bec (…) They taught us how to do it without damaging the site, and they taught us many things about the Mayas that lived here (…) But when we found small (archaeological) pieces, we would show them, and the French told us to dig them again. (…) I thought that was strange but I obeyed (…) Then, very early in the morning, we would see that the French were coming back from the archaeological site carrying boxes (…) and when we arrived later to Rio Bec, the pieces that we discovered the previous day were not where we buried it anymore (…) I'm sure they took them. (…) It was even on the newspapers, but we couldn't do anything to stop them (…)"

Some members of the *ejidal* organisation were also lobbying within the rest of the members of the *ejido* to obtain the authorisation to provide hunting tourism. The *ejido* obtained permits to hunt certain species paying governmental fees of $317 per animal, which they could sell for between $6,000-$8,000 MXN. However, the majority of the *ejidal* members wanted to offer the hunting services only at a price superior to $50,000 MXN to offset the risks of providing this type of tourism.

In preparation to the expected increase in tourism influx due to the construction of the mega structural project Tren Maya, the *ejidal* council started the construction of four palapas to increase the number of rooms to provide accommodation to tourists. The *ejidal* council also allocated resources to different households so they could also have rooms with toilets suitable for accommodating tourists.

At the moment of fieldwork, the interest of external investors on the *ejido* was reduced; however, the *ejidatarios* have made democratic decisions to reduce the surface of land that can be sold to external actors. Only parcelled land can be sold, but in general, inhabitants of the community oppose the entrance of investors, as they fear this would displace them, jeopardise their livelihoods and could

bring insecurity to their village. By allocating resources for the construction of rooms for tourism accommodation to different households, the *ejidal* leader expected to discourage families from selling to external investors.

5.6 Conclusions

The CBT gains for the fulfilment of CLPs manifested in different ways in each of the researched communities and delivered different trajectories of SSE development. In Chunyaxche, the gains that came with the implementation of T4D initiatives as well as the adoption of solidarity principles in their economic processes remained among the members and workers of the tourism CBOs and the few PEOs that supported them, confining the SSE to tourism. Conversely, in the communities of San Felipe and Ejido 20 de Noviembre, the gains reached most of their population and permeated into their traditional economic activities. Therefore, these communities were able to develop their SSE and worked towards the fulfilment of their CLPs.

The gains materialized in the integration of CBT value chains that included the traditional economic vocations of the communities in tourism and the different ventures in the popular economy, generating collective efficacy. Finally, the communities that reached a higher construction of their SSE manifested the gains from CBT in the pursuit of CLPs. Therefore, according to the manifestations of the gains, it was possible to depict three different trajectories of SSE construction: The Paradox of CBT Success and SSE Confinement; Cooperativism as a SSE principle and; CBT Adaptation to *Ejidal* Organisation for CLPs.

While mainstream T4D scholarship has linked the short lifespan of CBT projects to a lack of community participation in tourism (Wondirad et al., 2020, Dodds et al., 2018), the majority of the literature ignores the factors that discourage community participation. The empirical findings in this chapter highlighted the effect that T4D failures have on populations' willingness to participate in T4D.

The depiction of the three distinct trajectories of tourism-based SSE construction add to the scholarly discussions that emphasised the need to utilise a sustainable livelihood approach to the study of T4D (Tao and Wall, 2009, Shen et al., 2008). The communities that preserved their traditional economic activities were capable of adapting CBT to their livelihood strategies and integrate them into ancillary sectors to CBT. Approaching tourism with a sustainable livelihood strategies (SLS) approach can help reduce T4D failures that constrained the growth of the popular economy, as allowing the creation of PEOs that provide complementary tourism services and products propelled the creation of CBT value

chains that can increase the engagement of more population groups into the economy (Gago et al., 2018).

Finally, this chapter made a novel connection between the SSE and tourism. The empirical findings in this chapter expanded the discussion of using an SSE approach to tourism beyond the characterization of social and solidarity tourism initiatives that incorporate solidarity values into top-down tourism models such as volunteer tourism (Calvo, 2017). The three distinct trajectories detailed in this chapter demonstrate that the development of a tourism-based SSE is feasible, filling a void in the literature regarding the use of tourism to foster SSE (Gaiger, 2013, Pereira Morais, 2014, Saguier and Brent, 2017, Villalba Eguiluz and Pérez de Mendiguren, 2019, Wallimann, 2014, Coraggio, 2017, Labrador Machín et al., 2017, Puig et al., 2016, Singer, 2007). The empirical findings of this chapter suggest that is possible to create a situated tourism model that fulfils CLPs. This approach requires a grassroots perspective that acknowledges the ontologies of the host communities in the design, implementation and operationalisation of T4D initiatives, and the SSE depicted a pathway to do so (Coraggio, 2007, Blaser, 2010).

However, internal and external factors influenced the extent to which CBT gains for CLPs permeated different economic processes, activities and populations groups. These factors influenced the reach of the gains from CBT for CLPs, as evidenced by the distribution of resources, labour, and gains among members of tourism CBOs and community residents who created PEOs to support the core tourism offering directly or indirectly. The internal factors include the social forms of organisation of work in each community, as well as cultural forms of organisation that generate exclusion, according to gender or marginalisation. Internal factors also entail the maintenance of the communities' traditional economic vocation in parallel to tourism, which strengthen the popular economy. The external factors encompass T4D failures, which played a critical role in constraining the spill of the gains towards other population groups and economic activities. I expand on these dimensions of failure in T4D in Chapter 6.

6 Failures in Tourism for Development

6.1 Introduction: The Pitfalls in Tourism for Development

This chapter contributes to the literature on tourism for development (T4D) and community-based tourism (CBT), by unfolding four dimensions of failure that preclude T4D from contributing in the fulfilment of communities' life project (CLPs) and hinder the long-term sustainability of small-scale tourism initiatives. This chapter also expands on the alternative literature on situated approaches to CBT as it delineates the barriers that prevent community engagement and community leadership in tourism planning, implementation and assessment of tourism (De Azevedo Irving, 2009). The four dimensions of failure observed are; arbitrary selection of communities and convenience in CBT imposition; disjointed efforts amongst facilitators; stringent and exclusionary regulations and requirements; and inadequacy in capacity building. There is a lack of recognition of these failures in the current academic scholarship on T4D as this body of work focuses largely upon the factors that inhibit the sustainability of tourism instead of on the development of the host communities.

As addressed in the second chapter, academic literature on T4D promotes sustainable tourism models like CBT as an environmentally friendly solution to fostering the development of marginalised communities in the Global South (2008, Li et al., 2016, Llorca‐Rodríguez et al., 2017). This approach is also championed by global financial organisations like the World Tourism Organisation (UNWTO), the World Bank (WB) and the International Monetary Fund (IMF) as well as tourism facilitators[9] and practitioners [NGOs, consultants, tour operators, among others], which fosters the myth that sustainable tourism contributes to the alleviation of poverty amongst the most vulnerable population groups (Duffy, 2015). However, small-scale sustainable tourism rarely ensures the development of the host communities because both the - limited scale of the endeavour and the long time it takes to grow or consolidate tourism, preclude the engagement of the broader population. Therefore, it is necessary to identify the barriers that inhibit the host populations from attaining their CLPs through CBT.

Research that addresses the lack of long-term sustainability of T4D and specifically of CBT focuses on the structural weaknesses in the design of alternative tourism models as the main causes of their collapse. These include a poor "product development" of the tourism offering, the lack of

[9] Tourism facilitators: Institutions and organisations –like NGOs, Governmental development programs, donor institutions and other actors that assist and advise communities in the creation or re-organization of tourism initiatives and destination ROMERO-BRITO, T. P., BUCKLEY, R. C. & BYRNE, J. 2016. NGO Partnerships in Using Ecotourism for Conservation: Systematic Review and Meta-Analysis. *Plos One,* 11. This concept was introduced in section 2.2.3 of this dissertation.

linkages with major tourist destinations, inefficient collective management structures and therefore also, poor governance (Dodds et al., 2018, Mitchell and Muckosy, 2008, Wang et al., 2016). Recent academic research highlights the importance of collaboration between tourism facilitators, the host communities and external actors like tour operators to ensure the long-term sustainability of small-scale tourism projects (Wang et al., 2016, Wondirad et al., 2020). However, few critical studies focus on the factors that hinder the improvement of the wellbeing of the inhabitants of the communities that adopt tourism as a new livelihood strategy. To accomplish this, it is necessary to examine the role of tourism facilitators as a cause of failure in T4D initiatives with respect to CLPs, an overlooked perspective in the current critical scholarship on T4D and CBT.

6.2 Identifying the Dimensions of Failure in Tourism for Development initiatives

The dimensions of failures in T4D were uncovered via interviews with a range of actors involved in tourism implementation, including tourism facilitators, consultants, academics, tourism network operators, and residents of host communities who were directly or indirectly involved in tourism. Hearing the perspectives of the several actors involved in the implementation of CBT provided knowledge of how each group experienced this process, and helped to identify inconsistencies in their experiences, which in turn enabled the identification of factors that prevent tourism from being a tool for effectively building CLPs.

In-depth interviews with tourism facilitators, consultants, academics, and government officials elucidated the rationale for T4D implementation methods in host communities. Conversely, listening to the inhabitants of the areas where CBT has been implemented enabled the identification of obstacles and constraints posed by the characteristics of T4D initiatives. While members of tourism community-based organisations (CBOs) discussed the barriers they faced in adopting tourism, residents of communities that were not part of the core tourism programme, discussed the obstacles that discouraged their participation in T4D as well as the impediments, which they encountered in adopting CBT. Interviews with operators of tourism networks, who typically act as intermediaries between tourism facilitators and host communities, enabled the identification of mismatches in CBT operation caused by tourism facilitators' misunderstanding of host communities' livelihood strategies and their forms of social organisation of work.

The comprehensive examination of the perspectives of the many players involved in the implementation of CBT allowed for the identification of the dimensions of failure in T4D initiatives implemented in the researched communities. The following sections of this chapter detail each of

the dimensions of failure identified by the analysis of the statements made by the various actors interviewed during data collection. The investigation incorporates information triangulation by using secondary sources such as academic studies of the region and information supplied by tourism facilitators.

6.3 First Dimension of Failure: Convenience in CBT imposition & arbitrary selection of the host communities

The first dimension of failure identified is the arbitrary selection of host communities and convenience in CBT imposition, demonstrating that tourism facilitators did not follow any protocols when selecting communities for T4D programmes. This failure is characterised by tourism facilitators failing to consider the most appropriate economic activities for development in a given community and instead, basing decisions on self-interest.

The imposition of CBT was a convenient strategy for the facilitators rather than the host communities, as the facilitators' primary purpose, as illustrated in Figure 3-12, was environmental preservation, rather than contributing in the fulfilment of CLPs. The absence of economic analysis compounded CBT's risk of failure, since a long-term commitment of resource is typically required to stabilise an entirely new economic activity that is not symbiotic with a community's current livelihood strategies.

Tourism facilitators reported in the interviews that protocols for selecting communities for T4D were mostly absent. Facilitators were already working in the communities on environmental protection initiatives, and CBT represented an advancement for many of these programmes. Indeed, conversations with residents of the investigated communities as well as with municipal government officials revealed that many areas located within the tourism facilitators' scope of action were neglected owing to cultural barriers, even when communities expressed a willingness to implement tourism. The arbitrary selection of communities resulted in the exclusion of highly marginalised communities from T4D programmes, as well as the concentration of resources among a few communities and, in some cases, a few CBOs within a given community, causing internal conflicts and impeding CBOs' financial autonomy.

6.3.1 Convenience in CBT imposition

The primary motivation of tourism facilitators was to safeguard communities' natural resources by implementing CBT to replace the host communities' traditional economic activities. However, in most cases, tourism functioned as a means of survival for the residents of the host communities, as they needed to diversify their economic activities to minimise the detrimental effects that external shocks had had upon their livelihoods previously.

For the community of San Felipe, the decline in fish and shellfish along the littoral due to unlawful trawling by large fishing enterprises compelled the government to restrict fishing near the shore. Local anglers witnessed an increase in health hazards as they were forced to go further from the coast and free dive in deep seas in order to capture bass and lobster, their most profitable products. In the community of Chunyaxche, the establishment of the Sian Ka'an NPA drastically decreased the residents' livelihood strategies, since they lost the land on which they practised subsistence agriculture, timber, hunting, and fishing. In the Ejido 20 de Noviembre, prolonged droughts reduced the productivity of subsistence agricultural and livestock raising operations. Therefore, CBT enabled the residents of this community to diversify, rather than replace, their livelihood strategies. A member of one of the community's tourism CBOs noted the role of tourism for her household economy:

"Economically, tourism helps us. (…) Our husbands work the land and sometimes earn no money, but if we sell [crafts], we contribute to the family's food supply, and they contribute as well when they earn money. (…) In my case, it benefits me because I sell my crafts and now I have cash to give them [her children] for school, which we previously lacked."

However, in many cases, tourism facilitators imposed CBT with the aim of eventually displacing host communities' traditional livelihood strategies for the sake of environmental protection, oblivious to the serious economic vulnerabilities that tourism would transfer to the communities that neglected their historic economic vocations. Facilitators disregarded the possibility of strengthening the communities' traditional economic activities – agriculture, fishing, timber, and hunting – and subsequently integrating them into the CBT value chain. The community's facilitator, Ejido 20 de Noviembre, stated the following:

"Of PRONATURA, [the objective] (…) is the conservation of the natural resources, of the species, of the ecosystems and sustainable tourism. Ecotourism is only a tool to achieve it, understanding that if the communities carry out touristic activities instead of extractive activities, like agriculture, cattle raising, and even forestry- (…) it helps conservation, because is like substituting one for another. We

are clear that is not a 100% substitution, as it would require more work, but at least to start, so they see tourism can make a significant economic contribution, so they eventually stop doing the extractive activities (…).”

Academics also had a significant role in the promotion of CBT to supplant the Mayan inhabitants' agricultural activities in the state of Quintana Roo. In the early 2000s, academics at Felipe Carrillo Puerto's Instituto Tecnologico Superior developed ‘interpretative trails’, a touristic amenity that entailed the construction of wooden pathways through rainforest vegetation and mangroves for flora and wildlife observation. Because some Mayan communities expressed interest in constructing these pathways, the CDI [now the National Institute of Indigenous People (INPI)] decided to replicate the ‘interpretive trails’ in indigenous communities throughout the Yucatan Peninsula to implement CBT. This was accomplished through the Federal Government's 2008–2012 Program of Alternative Tourism in Indigenous Communities (PTAZI) (CONEVAL, 2013). The academic who led the creation of this tourism attraction commented on this process:

“We began the project of Interpretative Trails (Senderos Interpretativos) in 1999 and completed it in 2000. (...) Members of the CDI, communities, and ejidos were invited, and a tour was organised to demonstrate that there were other ways to use the rainforest besides "milpa" (agriculture) and timber. I gave them a tour as if they were tourists, explaining everything, (...) to show that it was a profitable activity and that at the end of the tour, the resources remained untouched, in contrast to agriculture and livestock farming, which destroyed them. Right there, the CDI staff stated, 'we want to replicate this model [interpretive trails],' and they developed projects focused on community-based ecotourism in Mayan communities.”

Nonetheless, when CBT expanded into marginalised communities on the Yucatan Peninsula, tensions developed between inhabitants and tourism facilitators. While facilitators emphasised the importance of environmental conservation via CBT, the residents of the host communities maintained a strong relationship to and reliance upon their surrounding ecosystems. Residents of host communities thought that the facilitators' influence was frequently damaging. One community member in Chunyaxche expressed the following:

“I was one of the people that opened the path to the lagoon. I have lived on this land my entire life and my family and I have always taken care of it. (...) However, when the tourism facilitator arrived, we were forbidden to use our land for hunting, fishing, or growing crops (...). And this territory was untouched when they arrived; we have always taken care of this territory; we built the trails, the dock, and we maintained this area (the natural protected area [NPA]), but now we are required to obtain authorization to work here (...)”

The absence of consideration for developing the host communities' traditional economic activities resulted in a deterioration of their livelihood strategies, impeding their integration into the CBT value chain. However, the absence of an analysis of the geographies selected for CBT implementation was accompanied by the absence of criteria for selecting communities for T4D. This resulted in an inadequate allocation of resources that excluded marginalised communities, including some with a strong potential for tourism, however, it favoured tourism facilitators.

6.3.2 Arbitrary selection of the host communities and CBOs

Numerous rural and coastal settlements on the Yucatan Peninsula are endowed with natural and archaeological resources that appeal to the tourists who travel to the region's renowned tourist destinations including Cancun, Playa del Carmen, and Tulum. While some scholars have developed protocols for selecting communities with the highest tourism potential, neither government institutions nor tourism facilitators indicated in interviews or secondary sources that they followed such protocols when choosing communities for T4D programmes (Lazzeretti and Capone, 2008, Lee et al., 2013). This resulted in an inefficient resource allocation that not only ignored tourism-related potential, but also disregarded the level of marginalisation of communities and the public interest in tourism development, whilst serving the agendas of tourism facilitators.

According to the interviews, tourism facilitators began working with the most "accessible" communities, both in terms of geographical location and as regards the previous connections that had been built through implementing environmental initiatives. An example of this occurred in the community of Chunyaxche, where in 1986 the NGO Amigos de Sian Ka'an (ASK) began working to champion the establishment of the Sian Ka'an NPA. After that, the NGO shifted its focus to tourism and began implementing CBT initiatives around the Yucatan Peninsula. In the 1980s, the NGO PRONATURA also operated environmental preservation projects in the Ejido 20 de Noviembre (PRONATURA, 2020). Due to the region's tourism-related potential, this NGO became a tourism facilitator in the 1990s by making available training courses to certify guides to perform local nature tours:

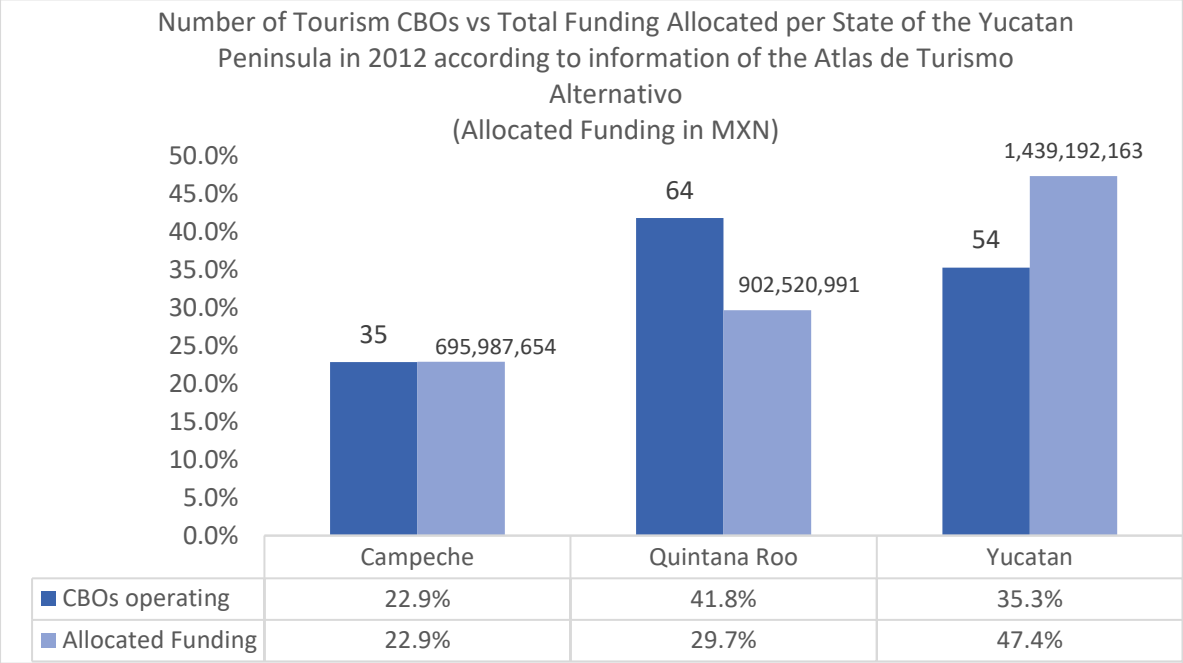
"PRONATURA has been working in Calakmul in the last 30 years, due to its historical, natural and cultural characteristics. (…) All this diversity was detected and, 30 years ago, the growth of the tourism influx was forecasted and the formation of tourism guides began. There, we started training to certify nature guides."

Conversely, the community of San Felipe did not have access to T4D initiatives, despite the local residents' desire to diversify their livelihood strategies through tourism and the town's tourism-related potential. However, some anglers developed CBT ventures with their own resources and a small T4D programme championed by CONANP (National Commission of Natural Protected Areas) began operating in Ria Lagartos NPA, assisting the anglers in refurbishing their boats for tourism provision. A member of San Felipe's tourism CBO recalled the following:

"(…) There are engine replacement programmes; however they are limited to fishing boats and not to tourism boats. (…) We do not understand why, there is so much money in tourism and yet they offer us, the "turisteros" (tourism providers), nothing. (…) The only source of funding is CONANP, but CONANP provides us with ten thousand, fifteen thousand MXN, when one engine costs $170,000 MXN (...). As a result, we had to organise ourselves to refurbish five boats per year, and we had to wait four years to renovate all of our boats. And when we were finished, the initial ones required repairs once more."

Secondary data confirmed that the distribution of resources for T4D is similarly arbitrary throughout the area. According to the "Atlas de Turismo Alternativo" (2015), a census of all social enterprises engaged in CBT in the Yucatan Peninsula, revealed that despite the fact that nearly 42% of the tourism CBOs are located in Quintana Roo, a tourism-oriented state, its CBOs received only 30% of T4D funding from 1994 to 2012. Nonetheless, facilitators placed 50% of T4D resources on 54 CBOs (35% of the Peninsula's total CBOs) based in Yucatan, where tourism is a secondary sector. Campeche received just 23% of available funding for T4D, despite the rural populations' severe marginalisation. Figure 6-1 illustrates the latter.

Figure 6-1: Tourism CBOs and Funding allocated for CBT from 1994 to 2012



Source: elaborated by the author with information of Atlas de Turismo Alternativo (Garcia de Fuentes et al., 2015, SHCP, 2012)

The discretionary allocation of resources occurred at a CBO level too. Facilitators frequently directed more resources to CBOs with which they developed stronger relationships, rather than allocating funds to the most vulnerable community groups or dispersing them across a larger number of CBOs. As shown in Figure 6-2, the "Atlas de Turismo Alternativo" estimated that 73% of CBOs in the Yucatan Peninsula received financing from facilitators, with 26% of the CBOs accounted for 80% of the overall resources granted to T4D in the region (Garcia de Fuentes et al., 2015).

Figure 6-2: Tourism CBOs that received funding for T4D from 1994-2012

Amount in MXN	% of businesses	Total of businesses	% of the funding	Total funding MXN
Without Funding	27.5%	42	0.0%	0
Less than 100,000	13.1%	20	0.7%	948,379
From 100,000 To 499,999	19.0%	29	5.1%	7,357,121
From 500,000 To 999,999	14.4%	22	11.5%	16,524,784
From 1,000,000 To 1,999,999	11.8%	18	16.1%	23,177,806
From 2,000,000 To 2,999,999	2.6%	4	6.9%	9,843,024
From 3,000,000 To 4,999,999	7.8%	12	28.8%	41,383,808
From 5,000,000 To 8,315,000	3.9%	6	28.3%	40,708,447
Total	100.0%	153	100.0%	143,693,777

Source: elaborated by the author with information of Atlas de Turismo Alternativo (Garcia de Fuentes et al., 2015, SHCP, 2012)

In Chunyaxche, I observed the exacerbated concentration of resources in a single organisation, where the tourism facilitator channelled five million MXN from 2012 to 2017 from a government T4D initiative into just one of four tourism CBOs operating in Sian Ka'an. According to members of the neglected CBOs and CONANP employees, a portion of the funds had to be applied in the improvement of the NPA's common areas: the dock, public restrooms, interpretative trails, and the waste management infrastructure, but the investment in common areas was minimal. However, as seen in Figure 6-3, the financially favoured CBO upgraded its boats, engines, kayaks, and life vests, and acquired transportation equipment to bring tourists from the main tourist destinations to the NPA. This CBO used the funds to build a visitors' centre that comprises offices, a restaurant, a museum, a butterfly pavilion, and a greenhouse for the exclusive enjoyment of the visitors that paid for the transportation services (according to field observations, this was not more than 30% of their visitors).

Figure 6-3: Tourism-related amenities of the financially favoured CBO in Chunyaxche

The excessive distribution of resources to this CBO aided not only in strengthening its infrastructure, but also in fostering the organisation's artificial growth in terms of revenue and workforce. This cooperative employed forty employees (including seven of the CBO's twelve partners); fourteen operated the boat tours and the rest of the staff maintained the visitors centre or performed management duties. The president of the community's largest CBO, who did not receive any funding, noted that the present level of tourism intake did not generate enough revenues to sustain such growth:

"These people (the financially-benefitted CBO) received funding, which is why they began this (tourism). They received a payment; they were given a five million MXN project to work on for five years. That is why they employ so many people; their salaries are funded by the initiative. And I lack the funds necessary to pay a large number of secretaries and other personnel."

The artificial growth of the financially-benefitted CBO undermined its capacity to attain financial viability and compelled the organisation to continue acquiring additional funds to keep operations afloat and generate revenue. They were successful in collecting funding through several T4D projects due to their close connection with the tourism facilitator, but some respondents alleged that they engaged in unethical practices to get resources. For instance, it was alleged that this CBO got funding for a gender equality initiative because the cooperative's partners enrolled their spouses as members. Nonetheless, the wife of a former CBO partner claimed that, despite their inclusion in the organisation's constitutive act, the spouses remained excluded from the CBO's activities and did not receive any profits:

"We [the wives] became partners when they built the restaurant, and they [their husbands] added our names only for the project, to show that women were part of the cooperative. However, they did not involve us in the cooperative. (…)The president [of the cooperative] told us that we could not work. They just borrowed our names, and they only made us sign many papers for the projects, but we were not invited to the meetings. We did not received any profits either."

The alleged misuse of resources and alleged encouragement of unethical behaviour dissuaded members of the community's largest CBO – which did not receive funding – from collaborating with the tourism facilitator, who constantly urged them to participate in T4D programmes. Conversely, this facilitator did not invite the smaller CBOs to participate in their initiatives. This alleged favouritism sowed discontent amongst members of the various CBOs, some of which was directed toward the tourism facilitator.

In another example, resources were concentrated into a tiny fraction of the communities in the municipality of Calakmul, which has eighty-three indigenous and rural communities. However, tourism facilitators work with only seven of them. The director of the Ministry of Tourism in Calakmul had the following thoughts on the subject:

"The NGOs are involved, but a lot of them work independently. (…) and I say this as a citizen, I do not understand why the NGOs are overprotective, why they do not share? (…) they repeat projects in the communities. If you go to the 20 de Noviembre, you will find three NGOs in the same project, we have eighty-three communities, why they do not go somewhere else? They all want 20 de Noviembre, Cristóbal Colón, Becán, everybody wants Conhuás, but we have more communities."

The exclusion of some of these communities is in part due to cultural barriers, since tourism facilitators overlooked the communities with no Spanish speakers. In an informal conversation, a government official from the Municipality of Calakmul stated the latter:

"All the NGOs work with the same communities and they don't go to the others because many of them do not speak Spanish but only their indigenous language, and the NGOs want to have fast results and don't want to do the effort of helping them."

The discretionary distribution of resources demonstrated that tourism facilitators prioritise their own convenience and agendas over expanding the reach of their T4D efforts. This arbitrariness is related to the dissociation between tourism facilitators' efforts and those of government agencies promoting T4D initiatives. The absence of collaborative action among these actors results not only in the arbitrary provision of resources to individual communities and CBOs, but also in their inability to combine resources to support strategic activities, therefore weakening CBT.

6.4 Second dimension of failure: Disassociated efforts among stakeholders

The second dimension of failure revealed is the disconnection between tourism facilitators and government agencies, which in some cases led to a shortening of the lifespan of CBT initiatives and jeopardised the livelihoods of host populations. Such lack of organisation can be observed in the interaction between government institutions at the federal, state, and municipal level, (even within the same department), and in the interaction between different tourism facilitators.

The lack of coordination between the different government institutions at the three levels of government (federal, state and municipal), led to the abandonment of CBT to focus upon the construction of macro-structural projects. This failure also contributed to the lack of integration of CBT into the value chain of famous tourist destinations and the federal tourism agenda. Finally, this dissociation hampered resource deployment for strategic activities aimed at strengthening T4D initiatives, jeopardising the long-term viability of tourism in communities by precluding collaborative investment in strategic activities aimed at promoting CBT.

6.4.1 Disjointed effort among institutions of the three levels of Government

Through the execution of various government projects, federal, state, and local government agencies exert permanent or temporary influence over the same territory. However, the lack of linkages and communication between the institutions at the three levels of government permits

the prioritisation of structural initiatives that could affect CBT and the livelihoods of host populations. An alarming manifestation of this is the 'Tren Maya' (Mayan Railway), President Andres Manuel Lopez Obrador's (AMLO) hallmark structural project, and its route through Calakmul, one of the country's most marginalised municipalities. While the federal government portrays this train as an opportunity to integrate poor communities with the rest of the country and improve their inhabitants' socioeconomic conditions, local leaders and residents of this municipality expressed concerns about the project (SECTUR, 2021). According to Calakmul's Director of Tourism, the 'Tren Maya' would increase the region's tourism intake to 8,000 people each day. Nonetheless, the region came to a grinding halt in December 2018, when the archaeological site of Calakmul received 1,000 visitors in a single day, a record for this location. The tourism influx overloaded the archaeological site, rendering its public services infrastructure insufficient.

Additionally, the Tren Maya project includes the development of 'sustainable cities', residential developments that tend to economically exclude the local population. However, one of the municipal government's primary concerns is its inability to provide basic public services such as sewage, water, and electricity to its current population, and the impossibility of providing these services to sustainable cities, which would entail construction over thousands of hectares in the area:

"The intention of the train is good; they want to develop the region, which is good. I am worried what it is behind the train, the 'sustainable cities' project. (…) we have been told verbally that eight thousand people per day [will arrive] and (…) in our actual conditions, it is worrying. We welcome the Tren Maya if they can bring us water, if we talk about a landfill, of drainage, first let's solve the street lightning, electric power, then, if we solve these basic issues, and then let's talk about the Tren Maya."

Therefore, the Municipal Government collaborated with NGOs and academics in 2019 to develop a Master Plan to mitigate the detrimental consequences that this federal project may have on the region. This plan involved regulating the tourist activities that may be established in the region, as well as enhancing public services at archaeological sites and promoting the municipality's tourism:

"(…) We are in the process of preparing the region. (…) This contingency is anticipated, as we will be developing the (tourism) Master Plan. We are currently (...) constructing a route through Xpujil; we will construct a city tour that will include three archaeological sites, as well as a Mayan 'sac be' [white roadways constructed by the ancient Mayas]. We are developing Xpujil 2 into an ecotourism destination. We propose that the solstice be observed in the ancient site of Becan between the 15th

and 18th of May. The municipality of Calakmul will deliver water to KM20 [the entrance point to the archaeological site of Calakmul] and the archaeological site, ensuring that there is sufficient water, and we will manage the toilets to ensure at least this service. We will maintain control of the bats' cave, build a website, and complete the cycleway circuit. We will work to build an artisan pavilion before the conclusion of our government, and transform it into a cultural centre; we will also have a permanent art and handcraft exhibition."

The Federal Government held a public consultation in December 2019 to ascertain support for the Tren Maya project amongst the communities that will be impacted. The results indicated that more than 90% of participants endorsed the initiative. Nonetheless, the United Nations (UN), which oversaw the consultation, stated that various irregularities in the referendum's methodology cast doubt on the results published by Mexico's President AMLO (Martin Cullell, 2019). The lack of transparency in the consultation process and their concerns about the train's potential harmful impact on Calakmul motivated the communities to contest the project legally, obtaining a legal protection (*amparo*) that suspended the construction of Tren Maya in the municipality of Calakmul (Tourliere, 2020). Despite objections to the project, the Federal Government resumed construction of the train in the region (Varillas, 2021, Vazquez, 2020).

Collaboration between federal, state, and municipal levels is also suggested to be lacking within the Ministry of Tourism, as discussed in the following section. This resulted in the exclusion of CBT from the Federal Tourism Agenda and impeded its incorporation into the value chain of tourism sites.

6.4.2 Neglecting CBT from the Federal Tourism Agenda

The lack of collaboration between CBT stakeholders and the federal Ministry of Tourism precluded the integration of CBT into the value chain of major tourist destinations, Federal Tourism Programs, and the Federal Tourism Promotion Programs. More significantly, the lack of engagement of the Ministry of Tourism and its Promotion Council with CBT resulted in these institutions struggling to promote this model of tourism on both the national and international level.

Additionally, Promotion Councils market CBT using the same strategies they use to promote recognized famous tourist destinations, jeopardising CBT sustainability. CBT destinations have a reduced touristic capacity, and commercializing thousands of bookings could destroy the communities. Additionally, because the Promotion Councils' objective is to capture new markets and boost the country's influx of international tourists, they are uninterested in destinations with

limited capacity, and hence neglect CBT destinations. The tourism consultant who worked with Chunyaxche and 20 de Noviembre made the following comments in this regard:

"There is a great deal of ignorance in the promotion institutions about how to sell CBT, which is understandable given its difficulty. If you market CBT incorrectly, you endanger the community. With Quintana Roo's Tourism Promotion Council (CPTQ), we developed a promotion strategy for them [Maya Ka'an tourism network]. They told us that, 'the next time we attend FITUR (International Tourism Trade Fair), we can put a stand for Maya Ka'an. However, this would not work since they (CPTQ) would be unable to trade with any FITUR tour operators, as FITUR is not interested in sending ten guests per week; they are interested in bringing a thousand, which the communities cannot accommodate. Therefore, we had to work quite hard to persuade them to do a highly specialised promotion, but it did not worked... They are now beginning to do so, but it will take considerable effort."

Although a CPTQ interviewee claimed that they had unique techniques for promoting Maya Ka'an, he was unable to identify the next event or activity aimed at commercialising this CBT destination in the next years. He confined himself to stating that they would employ distinct techniques for each destination, and that the goal for Maya Ka'an was to target the appropriate tourist market.

Unfortunately, fragmentation does not only exist between federal, state, and local government organisations, but also between tourism facilitators and municipal government entities. This has limited the allocation of resources for CBT-enhancing strategies, since tourism facilitators tend to prefer to invest in activities that justify their own existence.

6.4.3 Disjoint effort among NGOs and government institutions.

Lack of collaboration among facilitators not only resulted in inefficient resource allocation, as discussed in Section 6.4.2, but also precluded funding strategic activities like promotion and commercialization of CBT destinations at tourism fairs and specialised events, which could help ensure the long-term viability of CBT initiatives. The lack of coordination among tourism facilitators is explained by their private agendas, in which enhancing their public image takes precedence above the needs of the CBOs they "assist." Calakmul's Director of Tourism commented as follows:

"Taking a member of the community [to a tourism trade fair] is quite complex, as it takes several days, and our financial situation is precarious. However, I believe that this [does not happen] due to a lack of willpower. (…) We pay for the space [in the tourism trade fairs], which is the most expensive part, (…) and if the NGOs were interested, we could do it: 'PRONATURA, you pay the

transportation of one representative of the communities and I, Haciendas del Mundo Maya [another NGO], pay for the food', because both NGOs are involved in the community. However, the NGOs do not participate in these activities; they are more interested in training, and other activities, that allow them to gain visibility (…)"

It is necessary to implement master plans to align facilitators' efforts and resources to reduce duplication of programs, increase the spatial coverage of their initiatives and address the strategic needs of these communities. The Director of Tourism of Calakmul advocates for the latter:

"The NGOs should be aligned to a system, to a plan, so they don't come from the outside and say 'we are going to develop this community' when they could strengthen, support and even make that the communities engage in more activities. We are talking about themes like the Tianguis de Acapulco [one of the most important tourism trade fairs in Mexico], if the NGOS, or everyone, the municipal Government, the NGOs, institutions, say 'Let's promote Sello Colectivo Calakmul [an umbrella brand that compels the offering created by artisans and CBOs], let's promote the communities. (…)' Together we could have a strong stand in the Tianguis, but we lack of those linkages. (…) Therefore, what we lack is planning."

The disconnection between tourism facilitators and government entities also tended to result in the enforcement of overly complex systems of requisites and regulations on the economic activities and territory of the communities that embraced CBT. Consequently, these various regulatory frameworks acted as barriers for most of the inhabitants and excluded the poorest population groups within communities from T4D projects.

6.5 Third Dimension of Failure: Systems of Requirements and Regulations as barriers for T4D

The third dimension of failure was the enforcement of inappropriate and overly complex regulations and requisites, which resulted in the exclusion of the most vulnerable inhabitants of host communities. These regulations and requisites included compliance with the numerous overlapping legislative regimes in the territories where the CBOs operated, demanded prior expertise in tourism provision, the existence of an initial infrastructure, and the imposition of the cooperative model as a form of social organisation of labour, excluding most from T4D.

6.5.1 Convergence of different Regulatory Frameworks in the same Territories

The three communities that were studied developed CBT within or near NPAs, near archaeological sites, or in large bodies of water. Such environments are subject to specific regulatory frameworks administered by distinct government organisations. To develop a tourism venture in an NPA, members of CBOs must adhere to 30 distinct regulatory frameworks, as seen in Figure 6-4. This barred most of the communities' population from participating in tourism, as the many regulatory frameworks banned communities' residents from accessing these spaces, since the majority could not comply with the enforced certifications and permits.

Figure 6-4: Converging Regulatory Frameworks for Tourism in NPAs

CONVERGING REGULATORY FRAMEWORKS FOR TOURISM IN NPAs	
International Agreement and Treaties	Convention on Biological Diversity UNESCO World Heritage Convention Ramsar Convention UNESCO Man and the Biosphere Programme
Federal Legislation	Organic Law of the Federal Public Administration (LOAPF) General Law of Ecological Equilibrium and Environmental Protection (LGEEPA) General Law of Tourism (LGT) Law of Sustainable Rural Development (LDRS) Law of National Waters (LAN) General Law for the Prevention and Integral Management of Waste (LGPGIR) Federal Law of Duties (LFD) General Law of Sustainable Forest Development (LGDRS) General Law of Wildlife (LGVS)
Regulations	Regulation of the LGEEPA for NPA Regulation of the LGEEPA for Territorial Ecological Regulation Regulation of the LGEEPA for Environmental Impact Regulation of the General Law of Tourism Regulation of the Maritime Safety Inspection Regulation of the General Law of Sustainable Forest Development
Management Programs	Management Programs for the NPAs
Norms and Guides	NMX-AA-133-SCFI-2013 Requisites for Eco-touristic Sustainability NOM-059-SEMARNAT-2010 Environmental Protection for Flora and Fauna Native Species NOM-022-SEMARNAT-2003 Specifications for conservation, sustainable usage and restoration of coastal wetlands in mangrove zones. NOM-012-TUR-2016 Requisites for touristic diving services NOM-06-TUR-2009 Minimum requirements of information, hygiene and safety for camping accommodations

[redacted]	NOM-08-TUR-2002 Guidelines for general and specialized cultural tourism guides NOM-09-TUR-2002 Guidelines for general and specialized nature and wildlife observation tourism guides NOM-010-TUR-2001 Contract requirements between tourism providers and users NOM-11-TUR-2001 Requirement of safety, information and operation for providers of adventure tourism services Guide for the presentation of the Environmental Impact Declaration NMX-AA-164-SCFI-2013 Minimum requirements for Sustainable Constructions

Source: (CONANP, 2018c)

To operate in NPAs, CBO members and employees must obtain the NOM-09-TUR-2002 accreditation for nature tour guides and the NOM-011-TUR-2001 certification for wildlife observation services. To get these credentials, members of tourism CBOs must travel to major cities and enrol in courses offered by the Institute of Tourism Competence (ICTUR) (SECTUR, 2015a). This requires the investment of financial resources that most people in the communities lack, due to their high marginalisation. Additionally, these CBOs must adhere to the management plans for the NPAs, which impose restrictions limiting their operations in order to mitigate the environmental effect of tourism activities.

To illustrate, the Sian Ka'an Management Plan regulates the operations of the CBOs in Chunyaxche that provide tour boats in the NPA's lagoons and channels. This plan specifies that only 20-foot boats powered by four-stroke engines with a maximum capacity of eight people [six tourists and two crewmembers] may operate in the area. It restricts the number of boats that can operate to seventeen units, restricting the expansion for every cooperative, whose fleets altogether total this number. Furthermore, the management plan limits the daily total of visitors that CBOs may take on tours, which is reviewed every five years. In February 2019, this limit was set to a maximum of 108 people per day but in May 2019 CONANP reduced this number to 84, with the argument that the boats were eroding the channels. However, no restriction are put on investors who are unlawfully constructing hotels in the lagoons' coastal zone, which also contribute to channel erosion (CONANP, 2014, Cauich, 2019).

Additionally, CBOs operating in bodies of water must adhere to the Ministry of Marine's laws and criteria. If the communities are located near INAH-managed archaeological sites, interested members must earn the NOM-08-TUR-2002 certification through ICTUR training in order to work as official archaeological guides and get permission to work in these sites (SECTUR, 2015a). These regulations apply to the tourism CBOs in addition to those impose by the Ministry of Treasury.

These regulations apply only to local inhabitants; if they do not comply with these, authorities have the power to ban not only the provision of their tourism services, but also the entrance to these spaces. Nonetheless, external guides – frequently foreigners or residents of other Mexican states – are permitted to give tourism services in NPAs and archaeological sites without the aforementioned credentials that are mandatory for the locals. Many interviewees from the three communities stated this situation, and the Director of the Ministry of Tourism of Calakmul gave an example of this:

"(…) CONANP establishes its rules, INAH establishes its rules, and this affects the citizen, (…), that wants to use those resources to work, to obtain an income. (…) a nature guide in Calakmul needs to obtain a permit from CONANP to take visitors to Calakmul, but he also has to obtain a federal license to be a guide in Calakmul. A foreign guide comes, and he enters without problem, but the local guide is stopped at KM20 because he does not have the permits."

The enforcement of multiple regulatory frameworks, as well as their discriminatory application, fostered discontent within host communities. The residents of these communities considered that all of these restrictions aimed at protecting the environment in their communities harmed their livelihoods, whilst at the same time they witnessed the private sector jeopardise the environmental sustainability of major tourist destinations. The president of a Chunyaxche tourism CBO stated his dissatisfaction:

"Here is the outmost place and we don't have government visits. All this route is pure 'ejido', pure rainforest, because is like the Mayan people. (…) Those closer to the government are the businesspeople (…) You can see in Cozumel the sea entrance is collapsed, what we had in Cancun they also destroyed it. And why the people from SEMARNAT (the Ministry of Environment and Natural Resources) and PROFEPA (Federal Attorney for Environmental Protection) come? To forbid us to break tree branches, to cut the mangrove trees. However, look there [Cozumel and Cancun], they [the businesspeople] do it worse and they [the government] do not do anything. Why? Because is money for the government. That is why I think we are marginalised, because we don't have money to give to the government, to pay taxes, for all those constructions…"

However, government-enforced laws are not the only impediments to the wider population engaging in CBT provision. Tourism facilitators also excluded the majority of residents from T4D by establishing conditions that limited access to resources for CBT implementation to the wealthiest residents of the localities that were studied.

6.5.2 Previous Experience on the Provision of Tourism and Initial Tourism Infrastructure

Tourism facilitators allocated T4D funds solely to CBOs with prior experience in providing tourism services and with an initial infrastructure in place to do so. Tourism facilitators imposed these requirements either to avoid imposing a new livelihood strategy and/or to ensure compliance with donor-mandated stipulations. However, these conditions excluded the most destitute population groups, who did not receive the seed funding necessary to enable the diversification of livelihoods (Thomas et al., 2010).

To avoid imposing a new economic activity, the tourism facilitator in 20 de Noviembre stated that they only dealt with CBOs that had some level of experience in tourism:

"In 2015 we detected that they had certain tourism products and services, others more consolidated than others, but they all needed support. (…) We did not start from nothing; we never implemented something from zero. "

In the instance of the Maya Ka'an tourism network, which connects many CBOs in Quintana Roo, including one of the four CBOs in Chunyaxche, prior requirements -that are discussed below- were enforced by the donor. Due to this constraint, the tourism consultant engaged in the design of Maya Ka'an indicated that they did not incorporate inexperienced organisations:

"The IADB project lasted three years; it was a relatively short-term project that needed a very clear commercial strategy. Therefore, we could not include organisations with no prior experience. (…) They had to have received at least ten tourists per year, but they had to know what they were doing (tourism). Numerous organisations obtained substantial funding, constructed their cottages and never received visitors."

The director of ASK –the tourism facilitator in Chunyaxche- expanded on the criteria they established to select the cooperatives that would integrate the tourism network Maya Ka'an:

"We visited most of the communities in the region to know where there were or not [tourism CBOs] to see how many comply with minimum operational criteria; that were already constituted, that were doing a [tourism] activity, that had a product developed, that had a minimum management capacity, overall, and that could offer something."

Facilitators only funded CBOs that had some initial infrastructure, again, overlooking the most impoverished within the communities. The consultant who was interviewed mentioned that initial infrastructure was an important factor in determining which CBOs were invited to join Maya Ka'an:

"(…) despite it was not a condition, or not for everyone, it was important that [CBOs] had some infrastructure; that they have a 'palapa', accommodation or bicycles to be able to create a product."

These conditions excluded the poorest population groups within these communities. Along with these constraints, tourism facilitators imposed additional criteria for awarding T4D resources. These requirements constrained the social organisation of work in tourism CBOs, even when the imposed forms conflicted with the host communities' culture.

6.5.3 Restriction of the forms of organisation of work

Requirements enforced through T4D initiatives constrained the social organisation of work of tourism CBOs and clashed with the host communities' traditions of solidarity and reciprocity. These criteria included the establishment of community groups with a restricted number of participants, their formal registration with the Ministry of Treasury, and the adoption of the cooperative model. These conditions discouraged residents of host communities from participating in CBT and, in certain cases, exacerbated conflicts amongst CBO members.

Because facilitators granted resources to groups rather than individuals, community members formed CBOs to gain access to funds. To be eligible to access T4D resources, the community groups needed to have some initial organisational structure. The consultant working in Chunyaxche noted that they first sought legally registered community groups, but due to a lack of formally registered CBOs, they chose groups that held yearly assemblies:

(…) The initial requisite was that they [tourism CBOs] were legally constituted, but we saw that there were not many. So we said, that they were at least organized, that had assemblies once a year (…) where we identified a strong leadership."

This constraint on the dispersal of resources for T4D resulted in 97% of the Yucatan Peninsula's tourism CBOs choosing to formally register their organisations (Garcia de Fuentes et al., 2015). Tourism facilitators also advocated cooperatives as the preferable form of labour organisation. In 2012, 78% of legally registered CBOs were cooperatives, 13% were *ejidal* organisations, and 6% followed a different form of social organisation - which includes the legal designations Sociedad de Solidaridad Social (SSS), Sociedad de Produccion Rural (SPR), and Asociacion Civil (AC) (Garcia de Fuentes et al., 2015, Lemas and Garcia de Fuentes, 2019). This was confirmed in Chunyaxche and San Felipe, where all the CBOs are officially registered as cooperatives.

Even legally recognised CBOs seeking to join tourism networks were required to follow the cooperative model. Because tourism networks were legally recognised as cooperative groups, they were accessible to only cooperatives. As a result, several CBOs were unable to participate, according to San Felipe's tourism facilitator:

"(…) Co'ox Mayab is a collective of cooperatives. (…) Therefore, to be members they [CBOS] had to be cooperatives, this was a legal impediment. Then, those who could not change their constitutive act, because they could not make it on time, or disagree with the legal figure, could not join."

Tourism facilitators did not enforce CBOs legal registration in severely marginalised communities like 20 de Noviembre, allowing more CBOs to participate in T4D initiatives. However, the facilitator limited the size of these CBOs. The president of one of the tourism CBOs in the community reflected on this:

"When we began the project, we were 20 [members). Of those 20, 15 remained, but the CDI wanted that only 10 appeared in the register as beneficiaries of the resources that they would give us, but the other five could participate. But they did not want that, (…) so they left."

These criteria resulted in the exclusion of community members seeking to diversify their livelihood strategies through tourism, as well as of community groups unable – or unwilling – to register as cooperatives. While tourism facilitators promoted the cooperative model, they did not give training on this form of labour arrangement, which generated tensions between the members of tourism CBOs. Additionally, tourism facilitators failed to provide the critical training necessary to develop CBT, focusing instead on training for the operation of tourist programmes.

6.6 Fourth Dimension of Failure: Inadequacy in capacity building in T4D

The fourth identified dimension of failure is a deficiency of capacity building in T4D initiatives. While tourism facilitators in host communities invested the majority of their resources in developing tourist infrastructure, they made minimal investment in improving management and operational skills. Additionally, tourism facilitators focused their training efforts on developing fundamental skills and obtaining mandatory certifications for tourism provision, overlooking the importance of developing the key skills necessary to strengthen tourism CBOs, such as management, costing and pricing, marketing, and refining the tourism services and products. Additionally, tourism facilitators pushed training sessions aimed at professionalising CBOs' operations. This failure exacerbated tensions between members of tourism CBOs and host community residents, as well as between

tourism facilitators, government officials, and other actors (tour operators and other private tourism-service providers).

6.6.1 Minimum investment in capacity building

Most of the funding for CBT development was allocated for creating and improving the infrastructure and equipment in the communities, and to a lesser extent, for building capabilities (Palomino Villavicencio et al., 2016). According to the Alternative Tourism Atlas (2015), tourism CBOs received training in areas such as management, service quality, languages, first aid, environmental conservation, nature tour guiding, and adventure tourism strategies. While 82% of CBOs received training in three areas: nature tour guiding, first aid, and environmental conservation. Less than 5% reported receiving training in five or more categories (Garcia de Fuentes et al., 2015). This situation was confirmed during fieldwork in San Felipe and Chunyaxche.

During the interviews, the tourism CBOs of San Felipe reported receiving marginal support for the renovation of their boats, and acquisition of equipment for the water tours, as well as training to obtain the nature tour guide and first aid certifications. In Chunyaxche, CBOs that were not benefitted from T4D initiatives only paid for the mandatory training required to get operating licenses in the NPA. However, the tourism facilitator provided further training to the CBOs that it had financially supported in areas such as management, service quality, and languages.

Conversely, the tourism facilitator in 20 de Noviembre provided training in a variety of areas, including certifications for nature guides, environmental conservation, English language proficiency, and service quality, amongst others, to enhance the abilities of those working in tourism. The training was open to all the inhabitants of the community and not only to the members of the tourism CBOs. Figure 6-5 summarises the areas of the training that the tourism CBOs received in each of the communities.

Figure 6-5: Training for the tourism CBOs[10]*

Training & Certifications	Chunyaxche	20 de Noviembre	San Felipe
Environmental Conservation	**Yes**	**Yes**	**No**
Accountability	**No**	**Yes**	**No**
Costing	**No**	**Yes**	**No**
Leadership / Management	**Yes***	**Yes**	**No**

[10] * Means that only the CBO working with the tourism facilitator received the specific training.

Governance	**Yes***	**No**	**No**
Natural Guides	**Yes**	**Yes**	**Yes**
Archaeological Guides	**No**	**Yes**	**No**
Navigation	**Yes**	**N/A**	**Yes**
English	**Yes***	**Yes**	**No**
Client service / Quality	**Yes***	**Yes**	**No**
Exchange of experiences to other CBT	**Yes***	**Yes**	**Yes**
First Aid	**Yes**	**Yes**	**Yes**

Inadequate capacity-building resources resulted in the provision of deficient tourism services in San Felipe, whereas widespread access to new information in 20 de Noviembre significantly aided in the strengthening of the community's tourism products and services and contributed to the fulfilment of their CLPs. However, in Chunyaxche, despite the tourism facilitator's restriction of training to a single tourism CBO, members of the cooperatives that did not received funding imitated the best practices of the financially benefitted CBO. However, discrimination in access to information, exacerbated tensions between the different CBOs and towards the tourism facilitator.

The disparities in the types of training provided in each community demonstrated that a relatively limited investment in capacity building weakened the communities' tourism product and services. Furthermore, a lack of training in strategic topics such as cooperativism — a form of work organisation enforced by facilitators – exacerbated conflicts amongst members of tourism CBOs and deterred some individuals from pursuing tourism. Additionally, the absence of strategic training on costing and pricing, as well as specialised training to refine the tourism products and services hampered their quality improvement and diminished the financial viability of tourism CBOs.

6.6.2 Lack of training in strategic areas

Tourism facilitators failed to provide strategic training in areas such as cooperativism, improvement of the tourism products and services and finance. This produced tensions between community members interested in CBT, and even resulted in the resignation of some tourism pioneers. Inadequate training in strategic areas hampered the enhancement of the tourism products and services and jeopardised the financial viability and hence the lifespan of tourism CBOs.

As discussed in section 6.5.3, tourism facilitators imposed the cooperative model on interested CBOs. However, they did not provide initial training in cooperativism. Therefore, members of CBOs lacked knowledge of cooperativism principles, underpinned in values of reciprocity, cooperation, autonomy, democratic decision-making, and equitable distribution of workloads and benefits. This

perpetuated a form of “light cooperativism” in which top-down T4D programmes kept CBOs subordinated to tourism facilitators, rather than fostering autonomy (Lemas and Garcia de Fuentes, 2019).

Due to the absence of adequate training on the imposed forms of organisation of work, internal conflict developed within tourism CBOs, resulting in the resignation of some members. A member of a tourism CBO in the Ejido 20 de Noviembre reflected on this:

“Initially, CDI wanted us to work and distribute the gains among all. We said, ‘no, we work and those who don’t, share the profit. Why do that?’ And my colleague said, ‘if all day we are sewing, and then the gains are shared equally between everyone, even when we work harder than the rest. It would be better that those who work, earn money, and those who don’t, don’t receive gains.’ That is how we work now, and I think, because of that, they saw this was a little more difficult than when we started. At the beginning yes, we were giving, let us say fifty MXN to each member, they saw it was easy without working, if they wanted they’d come, if they didn’t they wouldn’t come. But we said to our colleagues; ‘this does not work for us, let’s work, and the person that works gains, and the one that does not work, does not make money’ and then some colleagues left’”

Facilitators failed to provide training to beneficiaries of CBT initiatives on how to operate equipment, enhance tourism services, or develop artisanal skills. A good example occurred in the Ejido 20 de Noviembre, where three embroidery workshops obtained industrial sewing machines but only received an hour of training on how to use them, despite the fact that none of their members knew how to sew or had ever used a sewing machine. With limited understanding of clothing manufacture and the use of home sewing machines, the members of the CBOs organised internal workshops to assist their members in developing their skills. This, however, exacerbated the challenge of adopting tourism as a new livelihood strategy, and many members of the embroidery workshops resigned. According to a member of an embroidery workshop, the lack of suitable training discouraged some of her colleagues from remaining in the CBO:

“"We needed willpower to be here because we knew nothing, we didn't know how to cut [clothes], we didn't know how to piece together, and we didn't know how to use the industrial sewing machines because we were accustomed to using domestic machines. Others were only familiar with cross-stitching; we did not use machines. And some quit the group because they couldn't figure out how to operate the machine, so they preferred to leave.”

Another key area of training deficiency is costing and pricing, which prevented CBOs from ensuring financial viability. According to interviews with the members of the tourism CBOs in Chunyaxche

and San Felipe, they were unaware of whether their organisations were profitable or running at a loss. They had control over the variable expenditures associated with daily operations, but were unsure if they had any revenues after accounting for their fixed costs. However, they were reluctant to revise their costs, since they believed that they would be unable to increase their prices, as visitors typically expected to affordable tours from indigenous CBOs.

Conversely, a few months prior to my fieldwork visit, the CBOs in the Ejido 20 de Noviembre received training on costs and pricing, and all the members of the CBOs reported increasing their prices as a result of realising they were selling their handcrafts and services at a loss. Consequently, they included their labour costs and fixed expenses, and a small profit, as many members of the tourism CBOs reported developing an appreciation for their work. They continued to give discounts, but were more careful. A member of the stone-craft workshop stated the following:

"The costing training was very good (…). Before I was giving away my crafts. I did not know I had to include my labour when I go to collect the stones, or the cost of the water I drink, or even the fuel for the motorbike to go to the 'monte' [rainforest] (…). Now I know I am an artisan and not a maquila worker, and I added the cost of my labour. (…) When wholesalers come, I don't sell them my crafts anymore, because I am an artisan, and my work is valuable and they don't want to pay for it."

There was a pervasive lack of critical training aimed at enhancing the long-term viability of tourism CBOs and their CBT ventures. This discouraged some community members from implementing CBT. However, in some cases, tourism facilitators pushed training which aimed to corporatize tourism CBOs, which had negative consequences, as it heightened tensions between tourism CBO members and facilitators, and in cases where CBO westernisation was successful, these organisations lost sight of their social mission of building CLPs.

6.6.3 Training for westernisation

While some organisations did not receive managerial or quality service training, some CBOs did, with the aim of corporatizing or 'professionalising' their operations. These westernised work models are extensively used worldwide in the tourism sector and entail a rapid response to bookings, continuous availability to provide tourism services, and standardisation of tourism products and services. However, these western concepts conflict with the host populations' livelihoods and traditional modes of social organisation of work.

The majority of CBOs face obstacles in their efforts to westernise their operations due to geographic, cultural, educational, and economic restrictions. As a result, the majority of the CBOs have not 'professionalised' their operations. The obstacles faced are multifaceted. Many CBOs are located in remote areas with limited connectivity, making it difficult to verify daily whether external stakeholders - tour operators, travel agencies, and so on - made bookings. As a result, CBOs are incapable of manifesting rapid response capabilities or extending their operations — and, indeed, are disinterested in doing so. Numerous members of tourism CBOs expressed hesitation to grow their organisations:

"*Now, I believe we are ok, because we occasionally complain about being unable to keep up with work. (…) First, as moms, we have to prepare breakfast and feed the children; when the children go to school, we clean, we make lunch; and finally, we use the free time we have to work on our handcrafts. We devote time in the afternoon to handcrafts. In the evening, we have to prepare dinner, and everything else, and then sleep for the next day. (…) So that is how we are now, and that is why I tell you that we are fine, we cannot grow more."*

Additionally, the majority of CBOs are unable to deliver standardised tourism services and products, as these rely upon their traditional livelihood strategies, which vary seasonally. If tourism-related activities involve trips to the 'milpa', this activity is reliant on harvest dates, if there is a drought, the activity is impacted. In the case of 20 de Noviembre, they are unable to transport people to the archaeological site during the rainy season, as the route is in part a rough track that becomes impassable during extended periods of wet weather.

There are, nevertheless, instances where CBOs accomplish corporatization and professionalization of their operations. Only one cooperative in the three communities investigated exhibits these characteristics: the externally financed CBO in Chunyaxche. While the tourism facilitator, consultants, academics, and other external stakeholders praise the cooperative's efforts toward this objective, this organisation appears to have lost its social character because it prioritises profits above the well-being of its members. A worker of the NPA who has been active in the community since its inception expressed the following:

"Have you seen how they [the members of the tourism CBO] live? They have not improved their homes, their lives (…) it is because the president of their cooperative does not gives them money, they don't have money (…) see the others, they are building business, their houses are pretty, they send their kids to school (…)".

This resulted from the decision of the president of the externally funded cooperative to reinvest 70% of the profits in the organisation, so only 30% of the yearly revenues were distributed amongst the partners of the cooperative. Consequently, the members of this CBO have seen the least improvement in their economic conditions in comparison to members of other CBOs in the community.

6.7 Conclusion: Redirecting the focus from the convenience of the tourism facilitators to the benefit to the communities.

This chapter identified four different dimensions of failure in top-down T4D initiatives that have not previously been addressed in the academic literature on T4D and CBT. Each of the dimensions of failure originated in the mismatch of the objectives of T4D those tourism facilitators, government institutions and the host communities had. These failures manifest in effectively discouraging the participation of the wider population of the host communities in CBT and/or in their exclusion from T4D.

Tourism facilitators' convenience overshadowed the needs of the communities and their desire to fulfil their CLPs. Facilitators acted primarily to protect their own interests, and fostered the four dimensions of failure detailed in this chapter: the arbitrary selection of the host communities and the role of the facilitator's convenience in CBT imposition; the disjointed efforts amongst stakeholders; the exclusionary requisites and regulations for T4D; and inadequacy in capacity building.

CBT imposition follows tourism facilitators' private interests and objectives, rather than those of the communities. The lack of consideration to strengthen the historic economic vocation of the communities, and its integration into a CBT value chain inhibits the engagement of a majority of the communities' population in CBT and the popular economy. The introduction of tourism requires extensive training, the modification of livelihood strategies and, long-term investment of time and resources before a consolidated CBT programme can manifest. This tends to exclude the most impoverished population groups. The arbitrary selection of the host communities and CBOs resulted in an inadequate allocation of resources for CBT in communities and CBOs, and tended to exclude some communities that have the natural, archaeological and cultural resources necessary for tourism due to cultural and geographical barriers. In addition, discretionary selection of only few CBOs from specific communities causes tensions between the inhabitants of the host

communities. Additionally, the excessive allocation of resources had the potential to preclude CBOs from achieving financial autonomy.

Disjointed efforts between tourism facilitators and local governments precluded the investment of resources in strategic activities for CBT that could ensure the financial long-term sustainability of tourism in these communities. Additionally, the disconnection between different entities of the Federal, State and Municipal governments jeopardised the lifespan of CBT and the livelihoods of the host communities, since the goal of building mega-structural projects was held in higher esteem than the wellbeing of the populations affected by these hallmark projects. Additionally, the lack of coordinated effort between the Federal, State and Municipal Ministry of Tourism, and their lack of involvement with the host communities prevented the integration of CBT into the Federal Tourism Agenda and into the national tourism value chain.

The prerequisites and regulations established by government institutions and tourism facilitators, excluded the most impoverished population groups in the communities from CBT and created tensions between the host communities and distrust towards tourism facilitators. These prerequisites and regulations are not synergistic with the traditional forms of organisation of work in the communities and tend to force communities to adopt the cooperative model, pushing them to formalise their tourism-related activity. In addition, the convergence of different regulatory frameworks in the territories of the host communities and the discriminatory way in which these are enforced generated distrust towards government authorities and tourism facilitators.

The inadequate capacity building jeopardised the long-term sustainably of CBT and created tensions amongst CBOs, as well as hostility toward facilitators and external stakeholders. These inadequacies prevented CBOs from improving their tourism services and products and made it more difficult for them to achieve financial viability. In addition, the aim of westernising CBOs encounter geographical and socio-economic barriers that caused tensions among internal and external stakeholders. Nevertheless, the more corporatized CBOs tended to lose their social purpose, in detriment of the wellbeing of their members.

A combination of these failures created conditions that impede T4D initiatives and prevent them from becoming instruments that contribute to the fulfilment of CLPs. More importantly, the dimensions of failure demonstrated that T4D initiatives often do not effectively take into account the well-being of the inhabitants living in communities that adopt CBT. This demands a rethinking of the design and implementation processes of T4D initiatives, which should be centred on the perspectives of communities interested in diversifying their livelihood strategies via tourism. Tourism facilitators and T4D projects must understand the host communities' livelihood strategies

and the critical role they play in diversifying local economies through external resources allocation. Tourism facilitators and T4D efforts must broaden their aims and strive to contribute to the fulfilment of CLPs in addition to environmental conservation.

Furthermore, it is vital to reassess the benefits of tourism in light of the host communities' viewpoints. While T4D may consider the absence of westernisation of CBT as a failure, the adaptation of tourism to local traditions and the associated reciprocity and solidarity from the host communities resulted in gains that defied economic logic but aided in the fulfilment of CLPs. The next chapter presents a taxonomy of gains from CBT, as seen by the people of the communities studied that occurred because of the application of solidarity to the resolution of conflicts.

7 A Taxonomy of Gains: A tourism for the fulfilment of Communities' Life Projects

7.1 Introduction: A tourism that 'works'.

"When the governor [of the state of Quintana Roo] invited me to work with him in the Ministry of Tourism, he asked me 'Do you know why you are here? You are here to make tourism work.' I asked him back 'Work for what? For what I think it should work or for what purpose?' And that was a good conversation, he asked me 'For what do you think tourism should work?' I answered 'It has to work for people's wellbeing, if tourism does not make people live better, (…) if it does not create stronger productive chains, if it does not improve people's relation with the sector, if it does not improve work conditions, then tourism does not work, (…). The governor then said to me, 'That is why you are here, to make tourism work'."

This is an excerpt from an interview I conducted with the state of Quintana Roo's former Minister of Tourism, who stated that her administration's aim was to make tourism 'work,' meaning that it should improve the state's inhabitants' well-being, or, as defined in this thesis, fulfil communities' life projects (CLPs). However, her office's tourism strategies for creating 'prosperity' for local populations included the implementation of new regulatory frameworks in the territory and the promotion of tourism for development (T4D) initiatives, both of which, as discussed in Chapters 2 and 3, have failed to make tourism 'work'.

Top-down T4D initiatives failed to accomplish the expected outcomes set by tourism facilitators. Additionally, they clashed with the aims that the host communities had for community-based tourism (CBT). While the facilitators expected that CBT would generate high tourism inflow, increase economic revenue and would tend to replace the traditional economic activities of the host communities, the residents wanted to attain livelihoods. Furthermore, as seen in Chapter 6, T4D initiatives, tended to fail in a number of different ways, leading to the exclusion of marginalised communities, as well as of the poorest population groups within communities that did adopt community-based tourism (CBT).

Those participating in tourism community-based organisations (CBOs) were still able to adapt CBT to their communities' cultures of reciprocity and solidarity, as reported in my interviews with residents. This adaptation generated positive unexpected gains, supporting the fulfilment of CLPs. Tourism facilitators did not intend or recognise such gains and they remain unacknowledged within the T4D literature. The gains do not fit with the capitalist logic of the tourism sector and rather fit

the Social and Solidarity Economy (SSE). This chapter contributes to the T4D literature by presenting a taxonomy of gains generated by CBT that enable the fulfilment of CLPs. These gains draw from Coraggio's (2011b) framework of principles that guide a SSE and the practices that establish it. This chapter's discussion also contributes to SSE research, by assessing how tourism could support SSE's development.

The taxonomy of gains presented here was developed by defining what 'development' meant to residents of the researched communities and by identifying the perceived benefits of tourism. Five distinct spheres constitute this taxonomy. These build and strengthen SSEs in the three communities considered here whilst fostering fair economic processes and seeking a more equal access to resources, employment and benefits in and across communities. The first sphere of gains, covered in Section 7.3, is the increase of psychological, social, and information resources available to residents in the communities, which empowered them to take meaningful action to fulfil their CLPs. The second realm of gains, discussed in Section 7.4, encompasses the integration of solidarity practises into the economic processes of production, distribution and redistribution of resources and profits, as well as the consumption of tourism-related services. Section 7.5 addresses the third sphere of gains, which entails the expansion of solidarity values into the circulation of resources within communities. The fourth area of gains, as depicted in Section 7.6, is the solidary coordination of local economies. Section 7.7 discusses the fifth sphere of gains, which is the development of the principles of solidarity that transcend all economic processes.

While T4D initiatives were key in generating the first sphere of gains, conflict sparked community-level solidarity and gave rise to the other spheres of gains. Owing to CBT's reduced tourism capacity, members of tourism CBOs developed rivalries, but they utilised solidarity as a political instrument to resolve their disagreements and guarantee that they had equal opportunities to solidify tourism as a new economic activity (Lopez Cordova, 2014). Through imitation, solidarity gradually spread to other economic activities and, as a result, to other population groups. However, as shown in the following sections, the reach of solidarity varied in each of the researched communities, as a result of the T4D dimensions of failure (analysed in Chapter 6).

The next section outlines the process of developing a taxonomy of tourism gains for CLPs. The identification of these unintended gains necessitated shifting the analysis of the outcomes of T4D initiatives away from the perspectives of tourism facilitators towards those of the residents of the communities that adopted CBT into their livelihood strategies to attain their CLPs.

7.2 Identifying the Taxonomy of CBT Gains for Communities' Life Projects

I developed a taxonomy of CBT gains for CLPs to recognise the positive, unintended effects of CBT on the researched communities, which practitioners and academics sometimes overlook since they contradict neoliberal logic and differ from the stated aims of T4D programmes. These unintended gains cannot be measured with quantitative indicators like economic pledges, profits, or tourism influx, but they enable the *'reproduccion ampliada de la vida',* defined in this thesis using a term coined by Blaser (2010), i.e. the attainment of communities' life projects (CLPs).

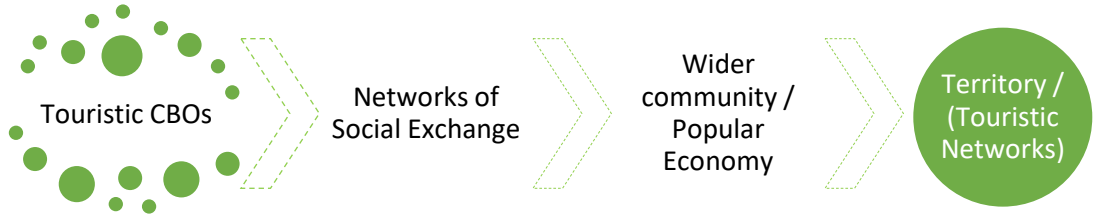
These gains surpass the increase of material, financial, and human resources that occurred due to the transfer of resources to residents of the communities that embraced tourism to diversify their livelihood strategies. The gains later permeated towards other economic activities and communities inhabitants. The taxonomy of gains includes the expansion of psychological, social, and information resources that empowered the people of the researched communities to improve their tourism-related services. Moreover, these gains also transformed the residents' social and economic relationships. The gains include the incorporation of solidarity practises into the different economic processes that resulted in the construction of the SSE and the empowerment of communities to participate actively in pursuing their CLPs instead of solely targeting the accumulation of financial wealth (Coraggio, 2015, Coraggio, 2016b).

The taxonomy of gains was developed from analysis of the transcripts of interviews and informal conversations with residents of the researched communities who were involved in CBT, whether directly or indirectly, including members of tourism CBOs, popular economy organisations (PEOs), community leaders, and tourism network operators. By hearing how these actors defined 'development' and identifying how they adapted CBT to their livelihood strategies, it was possible to identify these unexpected gains that cannot be monetized, but enabled the fulfilment of their CLPs. The construction of this taxonomy required an examination of the resources acquired through CBT that were critical in achieving CLPs, alongside the adoption of solidarity principles that build the local SSE (Coraggio, 2011a).

As seen in figure 7-1, the gains expanded gradually from CBOs to the broader population, and the distribution of the gains varied between the three researched communities. These unintended benefits were initially recognised amongst several tourism CBOs. For the communities of San Felipe and Ejido 20 de Noviembre, these benefits extended to the networks of social exchange (NSE) of CBO members, who incorporated the goods and services supplied by the PEOs to supplement their core tourism products and services. In the Ejido 20 de Noviembre, the benefits were also felt in other villages because of the establishment of a tourism network that enabled communities to collaborate

to strengthen their CBT destinations. However, as detailed in the subsequent sections of this chapter, the expansion of gains was not always a linear process, but was frequently an iterative, fragmented and contested one, as gains did not always spread to all economic activities and processes, and in some cases, certain population groups remained excluded.

Figure 7-1: Expansion of the CBT gains taxonomy for CLPs



The emergence of CBT gains was also gradual, as seen in Figure 7-2. Initially, psychological, social, and information resources increased with the implementation of T4D initiatives and the arrival of tourists to the communities. Whilst this gain is not monetizable, it enabled communities' inhabitants to take meaningful actions to attain their CLPs. To set an example, through building psychological resources, in the form of self-confidence and leadership abilities, members of communities began challenging external actors – government officials and tourism facilitators – on issues pertaining to their 'development.'

The remaining gains likewise contravene neoliberal logic, as they include the incorporation of solidarity practises within the communities' economic processes. Initially, solidarity traditions served to resolve conflicts, but their application in the different economic processes helped to build a SSE and encouraged communities to fulfil their CLPs. Solidarity fostered synergy among tourism CBOs and PEOs, enhancing each community's tourism goods and service and in some cases, generated collective efficacy (Sampson, 1997, Johnson, 2016).

Given the limited load-capacity of CBT, tensions between members of tourism CBOs erupted, and as a result, they established solidary agreements to equalise their opportunities to prosper through tourism. This led to the formation of the second domain of gains that entails the incorporation of solidarity values into tourism provision, which involves the economic processes of production; distribution and redistribution; and consumption. An example of such is the embracement of solidary behaviour over market competition, to guarantee equal opportunities for all tourism CBOs to sell to the tourism market. This enabled tourism CBOs in the researched communities to endure in the long term, overcoming low-tourist seasons, the consequences of climatological events – hurricanes and floods, mainly – and a pandemic (H1N1 in 2009) – while also fostering the popular economy.

Solidarity principles spread throughout the community, generating the third domain of gains, which comprises the implementation of solidarity practises in resource and profit circulation. This meant that inhabitants of the communities that continued traditional economic activities (survival agriculture, fishing, crafts, and timber) alongside tourism integrated these activities into CBT.

Application of solidarity in circulation led to the implementation of solidarity practices into economic coordination, which is the fourth sphere of gains. This gain included the protection of the local economy and CBT from external investors and other stakeholders perceived as a threat to the communities through democratic decision-making processes at both the community and tourism network levels (this last includes coordinating with CBOs in other communities).

Finally, I identified a fifth sphere of gains, which consisted of the development of solidarity principles that influence all economic processes in the communities. This gain entailed values like free initiative and socially responsible innovation, which stimulated the expansion of the popular economy. As a result, every person of the community was free to participate in the local economy by establishing new PEOs that complement existing economic activities.

Figure 7-2: The taxonomy of CBT gains for CLPs

7.3 The first sphere of gains: increase of critical resources for CLPs

Interviewees from the host communities, both directly and indirectly involved with tourism; tourism facilitators; and external stakeholders stated that the communities' household resources increased with the implementation of T4D and that they continued to increase due to tourism growth (Avila-Foucat and Rodriguez-Robayo, 2018, Bennett et al., 2012, Rakodi, 1999). However, the most significant gains from CBT had a transformative effect in the communities, as these gains empowered their members to improve their tourism supply and act proactively in the satisfaction of their needs

and legitimate desires, in many cases challenging the aims of external actors and facilitators. These gains are the increase of the psychological, social and information resources as well as the application of solidarity to guide economic relations.

Community members, working both directly and indirectly in CBT, recognised that their psychological, social and information related capital experienced a significant growth due to tourism. In turn, these resources had a major impact in the improvement of their economic activities as well as in the fortification of the lives of the inhabitants of the whole community. Initially, the members of the tourism CBOs and their employees saw an increase of these resources during the implementation of CBT, propelled by the acquisition of new skills and interactions with external actors: tourism facilitators, government officials, tour operators and travel agencies. Later, during the growth of CBT, these benefits spread to the broader population through their interactions with the external stakeholders and visitors. This occurred because more households were able to participate in boosting the economy by providing complementary tourism related services like the provision of temporary accommodation, food and beverages and petty trade (for instance in handicrafts).

7.3.1 Psychological Resources

Psychological resources include self-confidence, tenacity, optimism, creativity, resilience, and motivation among other factors. These variables are critical for empowering marginalised individuals to take meaningful action to improve their wellbeing (Alsop and Heinsohn, 2005, Joaquina Palomar et al., 2005). In the researched communities, the first groups to see growth of these resources were those involved directly with CBT. The high marginalisation in these communities made their inhabitants resilient. However, to implement tourism, members of the tourism CBOs increased their resilience and creativity still further. These inhabitants had to overcome both the obstacles stemming from T4D's failures, as discussed in Chapter 6, as well as the challenges of learning a new economic activity that required the investment of additional resources, as seen in section 6.5.2.

Prior to tourism, these communities had little interaction with external actors apart from government personnel administering social programmes, and one of the main obstacle that members of tourism CBOs had to overcome was their fear of communicating with tourists. However, by operating their tourism ventures and due to the impossibility of avoiding dialogue with their visitors, these groups saw a significant increase in their self-confidence, which aided them in improving the quality of their tourism services. The operator of Visit Calakmul, the tourism network that includes Ejido 20 de Noviembre, reflected on this gain:

"There is an increase in personal confidence. Because previously, they were very shy, especially in Mancolona, which is the most isolated (community) and they were extremely shy; when a tourist visited them, they would remain silent, but now they have drop their self-consciousness and are much more confident. The tour guides too, they were very restrained, but now they are much more confident."

With the increased influx of tourists to these communities, residents established PEOs that supported their tourism supply directly, such as food and beverage provision, temporary accommodation, and handicraft production, as well as indirectly, for instance via petty trade. Their interactions with the visitors also helped boost the wider population's self-confidence. The following formed part of a statement given by the owner of a small retail store in Chunyaxche:

"Previously, I was very shy to speak to strangers, because I don't speak much Spanish, but as more people visit our community and come to the store, it has become easier (….) now I feel more secure when speaking to the people that enter my shop."

Additionally, this gain in self-confidence empowered community leaders to engage in decision-making processes related to their 'development' and to take a proactive role in the implementation of strategies that could support the fulfilment of their CLPs. However, some tourism facilitators perceived increased empowerment as a risk, worried that community leaders would mishandle power. Therefore, as one of the tourism facilitators interviewed remarked, they implemented measures to counteract it:

""(...) the question of empowerment (...) to what extent is it good, and what is the limit?" (...) and when you have power, it goes to your head, and you lose sight of the initial goals and objectives. It is also crucial to consider how much empowerment might affect a person. Because they can frequently influence their own people, (...) and they can manipulate their allies. (...) As a result, I have tried to counteract this by involving more people. (...) That is what we do; we will not confront anyone since there are some individuals with a lot of authority (...)."

Despite these interventions, the growth in the host communities' psychological resources drove them to protect their tourism activities against external actors and prioritise the pursuit of their CLPs. A member of a tourism CBO in San Felipe reflected on how the residents of the community forced government authorities to stop the entrance of external investors:

"The municipal government attempted to attract investors to San Felipe, (…) but we united with others (members of the community) and pressured the authorities to make the external investors go. We do not wish to be displaced, they come with money and (…) we do not want other people to take advantage of our efforts. (…) We should be the only ones who gain from it"

Increased psychological resources were accompanied by an increase in bonding social capital, which strengthened and stimulated the development of horizontal relationships in the communities that embraced CBT. This enabled host populations to unite forces not just to confront external actors, but also to foster synergies through the integration of PEOs into their core tourism supply. Additionally, the strengthening of bonding social capital established the foundation for the construction of a SSE in communities.

7.3.2 Increase of social capital

Social capital is the collectively-owned resources gathered by a network that enables its members to accomplish their individual and collective objectives (Coleman, 1988, Bourdieu, 2001, Putnam, 1995). This resource began to grow in the researched communities with the creation of tourism CBOs, and steadily increased with the development of CBT, the popular economy (PE) and the creation of tourism-based networks. The three types of social capital that increased are bonding, bridging and linking capital (Johnson, 2016). The most significant gain was the growth of bonding capital between residents, which led to collective efficacy, the construction of the SSE and supported the fulfilment of CLPs.

In first instance, linking social capital increased due to tourism facilitators' intervention, which allocated material, financial and human resources during the implementation of T4D initiatives. As the influx of tourists to these communities increased, other residents in the host communities were able to engage in the economy by establishing PEOs to support the core tourism supply, both directly and indirectly. For example, the CBOs recommending or selling the PEOs' services and goods to the visitors, consuming these services themselves, or representing the interests of CBOs and PEOs in other communities, and at tourism-related and artisan fairs. Furthermore, this strengthened the bonding social capital between the members of the different tourism CBOs, and between these and the new PEOs.

Participant observation revealed that the growth of bonding social capital varied between the researched communities. In Chunyaxche and San Felipe, the increase in bonding social capital was confined to tourism CBOs and their NSE. In Chunyaxche, restrictive regulations and requirements (explained in section 6.5) imposed by tourism facilitators and government institutions excluded the broader population from participating in CBT and even accessing the natural protected area (NPA). The expansion of this capital was therefore restricted to the PEOs, which directly supported the members of tourism CBOs with ancillary services such as food and beverage provision, and mechanical

services to maintain the cooperatives' boat engines. In San Felipe, members of tourism CBOs offered tourists the complementary services provided by members of their NSE, such as temporary accommodation, restaurants, and handicrafts. Nonetheless, members of the tourism CBOs excluded PEOs created by inhabitants that did not belong to their NSE, in spite of the fact that these provided complementary tourism services. A member of one of the excluded PEOs stated the following:

"They (the tourism CBOs) have tried to shut us down (…). They want everything for themselves. They colluded with the [municipality's] officials to shut us down, but we obtained our concession and all of our permissions are in order. We simply want to work and we just want them [the tourism CBOs and local government] to let us work, we don't want anything for free, we just want to earn our own money and make a living"

In Ejido 20 de Noviembre, the growth of bonding social capital was widespread. In spite of this, participant observations and informal conversations enabled me to identify disputes amongst certain community residents. Some artisans complained that not everyone who was displaying their handcrafts in the common palapa were participating in the work rota, causing tensions. As a result, some tourism CBOs decided to display their crafts in their workshops rather than in the communal space. However, the *ejidal* council prohibited the exclusion of any e*jido* inhabitant. Members of artisan workshops, the *ejidal* council, and local tour guides endorsed the tourism supply of all of their tourism CBOs to their visitors, and motivated other residents to participate by providing food and beverage services as well as temporary accommodation to tourists who requested these services. This enhanced the community's tourism supply and contributed to the PE's growth.

Additionally, the communities developed their bridging social capital through the establishment of work agreements with tour operators and travel agencies, as well as the establishment of tourism networks that strengthened their links with the tourism market. In Chunyaxche, only the financially benefitted CBO developed relationships with its tourism facilitator and was capable of making direct contact with the tourism market through advertisement in Cancun, Playa del Carmen, and Tulum, as well as through the tourism network Maya Ka'an. The remaining CBOs in the community formed alliances with tour operators and individual tour guides to expand their consumer base, but in doing so incurred in intermediation costs.

In Ejido 20 de Noviembre and San Felipe, residents increased their bridging social capital through their involvement in the Visit Calakmul and Co'ox Mayab tourism networks, respectively. However, the ties of the tourism CBOs' in San Felipe to Co'ox Mayab is nascent, and they receive very few tourists in consequence of this relationship. Conversely, the tourism network Visit Calakmul is the primary link between Ejido 20 de Noviembre and the tourism market. Additionally, Calakmul's municipality

established the artisan delegate post, who promotes the artisan work of the municipality's eighty-four communities at tourism fairs. The artisan delegate mentioned the nature of her work:

"As a representative I have to promote everything. If here in the community they [the visitors] do not find something, let us say they want other types of crafts, I tell them that Mancolona produces scented candles, bags and wristbands. I offer the interpretative trails and campsites of Nueva Vida, and they products for personal hygiene [shampoos, etc.]. And in Conhuás they work textiles, but they are unravelled, and they make rugs too. In Becán they make hammocks, but with cotton thread, as opposed to those made here, which are made of silk threads. In my job, I am responsible for promoting others. (…) I do it here and in the fairs organised by the municipal government, but I represent everyone, not just the network's five communities."

7.3.3 Increase of Information resources

Information resources incorporates access to information and its processing and transformation into meaningful knowledge (Alsop and Heinsohn, 2005). T4D programmes increased information resources by making new knowledge accessible to CBO members through training and experience exchanges in other tourist destinations. Tourism CBOs transformed new information into meaningful knowledge to both improve their tourism supply and to design new tourism services. New knowledge later permeated the local PEOs.

Innovation because of the application of new knowledge occurred during the operationalisation of tourism, as a result of interactions between tourism CBOs and their visitors. Tourists provided feedback directly to members of tourism CBOs that enabled them to improve and innovate their services to meet market demands. In Chunyaxche, improvements entailed the provision of detailed explanations of the region's vegetation, including their traditional uses, as well as fauna observation, particularly of birds, by informing visitors of the birds' scientific and Mayan names, and by sharing information about their migration patterns, among other details.

Ejido 20 de Noviembre is the community that made the most significant advances, such as developing new tourism services and crafts, as well as refining their artisanship. Initially, the tourism CBOs only sold their handicrafts to visitors, but a request of a group of tourists who wanted instruction in one of the CBOs' traditional crafts sparked the design of workshop services across the community. A pioneer of these services, a member of the cross-stitch embroidery workshop, described her experience:

"(…) the first workshop I gave, [was] to some girls (…) the girls arrived and said 'we want to see your workshop'. I opened my workshop, but they said 'we want to take your workshop'. And I thought 'what

am I going to do? (…) I've never delivered a workshop before'. (…) So I decided to teach them (…) the most traditional (...) cross-stitching birds. But (…) they wanted to stitch (…) some borders, so I began painting them and I demonstrated them how I was doing so (…) that they could learn to paint and cross-stitch for themselves. They did not finish their bags. I think I worked with them for three hours, as the borders were large and the bags were medium size. (…). The girls left, they are from Chile, and not too long from their visit, they sent more people from Chile, and they expressed their satisfaction with the experience."

Following this experience, the members of this embroidery workshop created smaller items that their clients could finish in a couple of hours. Additionally, members of the stone workshop claimed that they had been able to refine their artisanship as a result of the influence of visitors with carving and sculpture expertise.

Figure 7-3: Innovation of the tourism supply in 20 de Noviembre

Source: https://www.facebook.com/visitcalakmul/photos/ (Calakmul, 2021)

In the case of San Felipe, the use of external knowledge to improve their tourism supply resulted in fewer resultant innovations compared to 20 de Noviembre. Knowledge transfer occurred through CBO members who worked in Rio Lagartos, a small tourist destination with similar tourism offering to San Felipe's; boat operators in Rio Lagartos provided trips to Las Coloradas and for the purpose of Flamingo observation in the estuary. With their work experience in Rio Lagartos, members of San Felipe's CBOs created a boat excursion to Las Coloradas as well. However, since this destination was

rather further from San Felipe than from Rio Lagartos it was prohibitively expensive for the average visitor, therefore members of the CBOs created three other excursions to adjacent estuarine scenic locations in addition to providing transportation to the beach region. Some members of these cooperatives also participated in a United Nations Development Program (UNDP) that organised exchanges of experience and knowledge with workers in Costa Rica. This resulted in an improvement of waste management in the beach area, which included the use of old fishing nets to retain recyclable garbage and prevent it from being dispersed across the beach or into the ocean by wind currents, as seen in figure 7.4.

Figure 7-4: Innovation in waste management in San Felipe.

7.4 The second sphere of gains: Solidarity in tourism provision

The second sphere of gains consists of the implementation of solidarity practices within the economic processes involved in the provision of CBT. Solidarity is a moral ideal that entails willingness to recognise and protect others in one's own self-interest. It also requires collaboration, the sharing of resources and responsibilities, and collective planning (Coraggio, 2016b). This sphere manifested differently in each of the three researched communities, dependent upon the severity of the failures of T4D initiatives in each village, the maintenance of the host communities' traditional economic vocation, and the forms of labour organisation.

The Ejido 20 de Noviembre's social and economic relationships were characterised by solidarity. The community's *ejidal* organisation fostered solidarity and through democratic decision-making processes, *ejidatarios* selected projects, established rules, and formulated strategies to meet their

most pressing needs or otherwise to help fulfil their CLPs. Therefore, when facilitators implemented T4D projects, community groups were already accustomed to working in solidarity.

However, in the Chunyaxche and San Felipe, the incorporation of solidarity into their economy did not occur spontaneously, nor did it originate in the communities' culture (Lopez Cordova, 2014). Solidarity served the political purpose of solving conflicts among tourism CBO members and thereby, increasing tourists' satisfaction. Disagreements emerged as a result of CBT's limited tourism capacity, which restricted the number of tourists that could enter these communities. Therefore, these actors adopted solidarity practises in tourism provision. Tourism provision involves the economic processes of production, distribution and redistribution, as well as of CBT consumption, as tourism is a service in which all of these processes happen simultaneously.

7.4.1 The emergence of conflict

Interviews and informal conversations with various actors involved in T4D initiatives in Chunyaxche and San Felipe revealed that the relationships between tourism CBO members were not initially solidary. Initially, CBOs members exhibited a market behaviour that favoured competition in order to sell their tours to the few tourists that arrived in their communities. Market behaviour included measures such as reducing tour prices, at the expense of monetary profit, or even to the point of operating at a loss.

Among the problems that triggered conflicts between tourism workers were allegations of 'stealing' potential consumers and failing to maintain the cleanliness of communal spaces. These issues frequently resulted in heated conversations and violent altercations amongst members of the various tourism CBOs in front of visitors, who were typically scared away and hence chose not to consume in these communities, or if they did, complained about their negative experience.

A member of a tourism CBO in Chunyaxche recalled why they decided to establish agreements with the other three cooperatives working in the natural protected area (NPA) of Sian Ka'an:

"(…) we were fighting for the few tourists that arrived to the lagoon, and they –the financially-benefitted CBO- tried to win them all by offering discounts on the tours (…) and there is also CONANP's limit on the number of boats that can depart every 25 minutes, which made it worst. However, with CONANP, we all sat down to discuss and come to an agreement. We decided to take turns selling our tours, the large CBOs received two turns, while we –the small CBOs- received one. But when the financially-benefitted CBO continued to reduce their rates, we had another meeting to limit the discounts and (standardised) the prices we charge to tourists (…)"

By establishing a work rota, the CBOs ensured that all the cooperatives had an equal opportunity to profit from CBT. The rota was established in accordance with the size of each CBO's fleets; the largest two cooperatives received two turns each due to their ownership of seven and six boats, while the remaining two cooperatives received one turn each due to their ownership of only one boat. This allowed all CBOs to operate boat trips continuously throughout the day, meeting the requirements of their guests.

The previous quote illustrates the commencement of the application of solidarity in tourism provision, through the substitution of competition for solidary cooperation. This solidarity was embedded into the economic activities of tourism CBOs through the establishment of verbal agreements. These agreements facilitated the incorporation of additional solidarity principles into the production of tourism services, which allowed more residents of the host communities to freely participate in their economy.

7.4.2 Solidarity practices in the production process

The first solidarity practices aimed to organise tourism production to equalise opportunities for CBOs to earn a living from tourism, and in the cases of Chunyaxche and San Felipe, to improve tourists' satisfaction too. According to Coraggio, the principles that strengthen the SSE, which are explained in 2.4.3, are: a) universal access to work and b) universal access to knowledge and means of production; c) implementation of solidary cooperation or solidary competition; d) autonomy in the management of the general production and reproduction conditions; and e) socially responsible production (Coraggio, 2015).

The principles of universal access to work, knowledge, and means of production enabled members of tourism CBOs to engage in CBT and develop their tourism supply with equality. However, T4D dimensions of failure restricted the reach of this gain in the communities of Chunyaxche and San Felipe, whereas the *ejidal* council of 20 de Noviembre facilitated the universalization of these principles, enabling a greater portion of its population to engage in tourism.

By creating a voluntary NPA, the Ejido 20 de Noviembre retained ownership over its natural resources and territory. Therefore, all community members have access to the spaces with tourism potential, such as the archaeological site of Rio Bec, and to means of production, which are the natural resources of the community. This translated into universal access to work, since any resident who wished to participate in any of the economic activities performed in the community was free to do so. Additionally, as discussed in Section 6.6.2, tourism facilitators in this community provided access to

training for the interested residents without requiring membership to a tourism CBO, and members of these organisations transferred the acquired knowledge to the broader population, thereby universalizing access to knowledge.

Conversely, the dimensions of failure described in Chapter 6 denied widespread access to work, knowledge, and means of production in Chunyaxche and San Felipe. As described in section 6.5, the imposition of inadequate and overly complex requirements and restrictions prevented access for the majority of residents of these communities to the NPAs where tourism activities were concentrated. CONANP restricted access to the NPAs where the tours took place in these two communities, limiting access to the means of production to CBOs with the mandated permits.

Despite the restrictions, the tourism CBOs enabled access to jobs and means of production to the people in their communities. In Chunyaxche, all employees and partners of the four tourism CBOs are indigenous Mayans. Members of San Felipe's three tourism cooperatives are community residents, and many work at the local fishing cooperatives.

In terms of access to knowledge, the tourism facilitator in Chunyaxche provided training only to the financially favoured CBO and denied access to the rest of the CBOs operating in the area, whereas in San Felipe, the lack of influence of T4D initiatives precluded access to new knowledge, as discussed in Section 6.6.1.

As discussed in Section 7.4.1, the rise of conflict prompted the adoption of solidarity in tourism production through applying the principles of solidary collaboration and solidary competition. Tourism CBOs demonstrated autonomy in regulating their production and reproduction conditions by implementing solidarity, which was favoured above commercial practises inherent in tourism. As a result, members of tourism CBOs had equal opportunity to earn money from tourism and encouraged other residents to engage in CBT.

According to various interviewees in the Ejido 20 de Noviembre, CBOs members assisted and encouraged residents in pursuing new tourism related ventures, which included the creation of workshops in a range of different crafts or complementary services such as temporary accommodation and food and beverage provision. For example, one leader of a woodworking workshop revealed that they relied heavily on the help of members of other tourism CBOs and the tourism facilitator to diversify their livelihoods via tourism.

“Thanks to (…) the artisans representative, and the people of PRONATURA, I was able to set up my workshop (…) many times I wanted to give up, but they wouldn’t let me (…) and now I have my

workshop and we've won awards for our work (…) and I do different crafts from the other wood workshop, so we don't compete (…). However, they all helped me and encouraged me to continue (…)"

To assist in consolidating tourism throughout the e*jido*, the tourism facilitator funded the construction of a palapa (figure 7-5) where the various CBOs and other community members displayed their crafts for sale to visitors, and those who displayed their work took turns serving the tourists and maintaining the space's cleanliness.

Figure 7-5: Palapa for exhibition of local crafts

Additionally, in 20 de Noviembre, each CBO had autonomy to manage their tourism activities in accordance with their livelihood strategies, and they adapted their tourism ventures' organisational structures to ensure the continuity of their traditional economic activities. This involved dividing workloads and timetables amongst members of each community group to enable everyone to continue with all of their existing livelihood strategies while also participating in CBT.

As discussed in Section 7.4.1, the tourism CBOs in Chunyaxche and San Felipe used solidarity to resolve problems and equalise their opportunities to make income from tourism. In Chunyaxche, the tourism supply consisted of two boat tours through the lagoons, and to prevent unfair competition, partners of the cooperatives standardised the tours in terms of routes, time allocations, information provision for tourists and pricing. Additionally, the CBOs placed a cap on the level of discount that they could provide.

In the community of San Felipe, the agreements included the construction of a palapa (figure 7-6) where members of the three cooperatives gathered rather than continuing to commercialise their boat trips from their own individual booths. Additionally, they established a work rota to organise their turns to sell the trips and avoid disadvantageous competition for the limited number of visitors. Because the three cooperatives offered the same tours, which consisted solely of transportation to various areas of interest for fauna observation and to the beach, they set the same pricing and limited the discounts that they would grant.

Figure 7-6: Palapa for CBOs and touristic dock in San Felipe

Cooperative members determined their daily labour rotas through a raffle prior to the start of their activities. Because the majority of tourism CBOs' partners continued their fishing activities, only individuals interested in performing tourism related work for the whole day signed in for the lottery. During low tourism seasons, most of the CBOs' partners worked weekdays in their anglers' cooperatives and gave boat trips on the weekends. This allowed some CBO members to rely entirely on CBT, as fewer members turned up to provide tours on weekdays and during low seasons, but they could increase their tourism capacity on weekends and during high tourism seasons.

Figure 7-7: Raffle of tours in San Felipe

The application of solidarity in tourism production, permeated into the processes of distribution and redistribution of resources and gains. This occurred by ensuring labour opportunities for the people of their communities, which also entailed better working conditions that those available to them in the famous tourist destinations.

7.4.3 Solidarity in the distribution and redistribution of resources and gains

In tourism, the economic process of production is strongly intertwined with the process of distribution and redistribution of resources and gains; therefore, the solidary principles of these processes are executed concurrently. The solidary principles applied to the process of distribution and redistribution are as follows: a) inclusion of marginalised individuals by the hegemonic economic system; b) distribution of labour according to the needs and work invested; c) preclusion of exploitation; and d) redistribution of gains with social justice (Coraggio, 2015).

In terms of inclusion of marginalised individuals, T4D initiatives facilitated the economic inclusion of the residents of the three researched communities who diversified their income sources through CBT. Residents of these communities were highly marginalised, and in many cases, they were forced to migrate to the main tourist destination or to nearby urban centres in order to survive. However, the allocation of resources for the establishment of tourism CBOs and the influx of tourists into these communities enabled the generation of income not only for tourism CBO members, but also for other residents who got involved in tourism and developed complementary goods and services.

Regarding the distribution of labour, what I found was that the partners of the tourism CBOs in the three communities established internal agreements to distribute and redistribute resources and

profits. While not all of these organisations' partners contributed the same amount of labour, the distribution of resources and gains is based on the work performed. Therefore, members who most needed to increase their income were able to devote more labour to their tourism CBOs, allowing a more equitable allocation of labour (as exemplified in section 7.4.2 with the community in San Felipe). Additionally, gains are redistributed in accordance with the amount of work invested, which CBO members perceived as fair (as exemplified in section 6.6.2 in regard to the Ejido 20 de Noviembre).

The distribution and redistribution of labour and gains benefited not just members of tourism CBOs, but also a wider population in the three communities. While not all residents participated in T4D initiatives in the Ejido 20 de Noviembre, members of tourism CBOs were able to spread workload among members of their NSE. This occurred when CBOs sought to increase their handicraft production, to participate in artisan and tourism fairs or to complete large customer orders. By doing so, members of CBOs were able to include individuals initially excluded from T4D initiatives. In spite of the fact that some members of the NSE were not partners in the relevant CBO, they received the same treatment as community group members and earned an equivalent income corresponding to their labour.

Additionally, the *ejidal* council charged a fee to tourists who visited the Rio Bec archaeological site, and this income was used to pay the wages of community members who worked on the site's maintenance. This enabled the distribution of labour to be expanded and the benefits of tourism to be redistributed to a broader population.

The expansion of the distribution of gains also occurred in Chunyaxche, since the tourism CBOs operating in Sian Ka'an pay the wages of residents in the *ejido* who keep the common spaces clean (bathrooms and the lagoon area). The *ejidal* organisation charge fees to visitors who use the *ejidal* parking lot and go through the mangrove interpretive trails. These fees cover the wages of the *ejido* residents who manage access to these spaces, as well as the wages of the community members who work on their maintenance.

Following Coraggio's solidarity principles applied to the distribution process, include preclusion of exploitation. This practice entails the prohibition of slavery or dependency compelled by violence, appropriation of another's labour, as well as non-promotion of salary relations (Coraggio, 2011b). The partners of the tourism CBOs in Ejido 20 de Noviembre as well as in San Felipe comply with this principle, except Chunyaxche, whose CBOs generated salaried labour, as not all the participants in CBT are partners of the cooperatives. Nevertheless, the work conditions that these cooperatives offer are superior to those available for Mayan inhabitants in the main tourist destinations, in terms of worked hours, salaries, holidays and other benefits.

7.4.4 Socially responsible production and Responsible Consumption

The residents of the Ejido 20 de Noviembre are extremely conscientious of their environment and actively promote responsible production not just via their tourism ventures, but also through their primary economic activity, timber sector. Only a small fraction of the Ejido is utilised for timber, and the workshops that utilise natural resources aim to recycle resources or find new uses for wood rejected in the local sawmill. The *ejido* leader reflected on this:

"The Ejido has licences to take visitors to Rio Bec – the archaeological site – and we also restricted the amount of hectares available for timber and rotate it each year to safeguard the land (...) we are the municipality's greenest Ejido. Anyone interested in working in tourism is welcome to do so because the land is ours, but those who bring tourists to Rio Bec must pay a fee to help us preserve it. Everybody respects the environment, and the artisans' workshops repurpose natural resources that are discarded in timber (...)"

In Chunyaxche and San Felipe, the regulatory frameworks governing the NPAs where tourism activities occurred (described in section 6.5.1.) and the CBT's reduced tourism capacity barred unsustainable exploitation of the local ecosystems. This fostered socially responsible CBT production, and because tourism is consumed during production, it promoted ecologically responsible consumption as well.

7.5 The third sphere of gains: Solidarity in Circulation of Resources and Profits

The third area of gains consisted of expanding the practise of solidarity beyond tourism-related economic activities and into the economic process of circulation, which encompasses the transference of the means of production, goods and services throughout the community. Incorporating solidarity into the circulation process entails adhering to the following principles: a) self-sufficiency; b) reciprocity; c) exchange; and d) money as a means, not an end (Coraggio, 2015).

During the implementation stage of T4D initiatives, only members of the community groups that diversified their livelihood strategies through tourism saw an increase in their portfolio of resources, either by transference of resources from tourism facilitators or through the investment of their own resources. The increase in income of tourism CBOs' members and the creation of jobs for inhabitants of their communities, allowed a broader distribution of tourism's economic gains in these locations. The economic gains created and strengthened households' capability to achieve livelihoods and contributed to the fulfilment of their CLPs via two distinct mechanisms: 1) fixed wages and income

growth from CBT enabled the accumulation of resources for livelihood diversification, and 2) increase of production of goods and services for household consumption and petty trade. Therefore, households reinforced their NSE by increasing their ability for reciprocity (González De La Rocha, 2007). Taken together, these factors assisted in fostering the creation of PEOs that supported the core tourism services directly or indirectly, generating new income sources that contributed in migration reduction (Gago et al., 2018).

7.5.1 Self-sufficiency

Self-sufficiency refers to a community's ability to satisfy its needs internally, using its own resources and labour. The communities of 20 de Noviembre and San Felipe demonstrated stronger economies due to their continued reliance on traditional livelihood strategies such as survival agriculture, timber, and fishing. This enabled them to integrate their traditional economic vocations into CBT's value chain, thereby strengthening their popular economies and fostering the development of stronger tourist destinations, as more residents of these localities were able to establish ventures that supported the main tourism services.

Conversely, in Chunyaxche, the dimensions of failure of T4D constrained the application of the self-sufficiency principle. In particular, the imposition of the stringent regulations (explained in section 6.5) that came with the establishment of the Sian Ka'an NPA impacted the community's livelihood strategies, as they were unable to access the land where they conducted their traditional activities: agriculture, fishing and timber. However, the tourism CBOs were able to make up for this to some extent by covering some of their needs, such as the maintenance of boat engines and the provision of meals for tourism workers *via* the PEOs that provided these services (figure 7-8).

Figure 7-8: Complementary services to tourism CBOs in Chunyaxche

7.5.2 Reciprocity

Circulation requires reciprocity, which is the capability of give, receive and return, and in the context of the SSE, it comprises horizontal relations among equals (Mauss, 2002, Coraggio, 2011b). In practice, reciprocity in circulation consists mainly of bartering, solidarity credits, and reliance on the NSE. Reciprocity must be distinguished from exchange, since reciprocity refers to a relationship between individuals, whereas exchange refers to the simple circulation of objects (Coraggio, 2014). Reciprocity in the three communities consists mainly of supporting their NSE and of the exchange of favours. However, the implementation of this principle reached different population groups in the three communities.

Due to the dimensions of failure of T4D, reciprocity in Chunyaxche is confined to tourism CBOs and e*jido* members who control access to the NPA's interpretative trails and parking lot. It also reached the few PEOs that provided ancillary services to the tourism CBO, which included the provision of food and beverages to tourism workers, and mechanical maintenance of the CBOs' boat engines. The forms of reciprocity observed in this community were communal work to keep the NPA's common areas clean and solidary credit for the products and services provided by the PEOs, but reciprocity did not extend further.

In the Ejido 20 de Noviembre, reciprocity reached the whole community due to its *ejidal* organisation that guided the community's social and economic relations. In monthly assemblies, the *ejidatarios* determined the most urgent needs to address and allocated material, financial and human resources to the households in greatest need or towards the fulfilment of their CLPs. Additionally, the community's inhabitants have '*faginas', a* "*Maya institution of communal labour wherein every adult has to serve in community projects periodically*" (Cruz, 2003, p.p. 499), which include waste management, community cleanliness and water distribution during droughts, among many other activities. This is the only community where goods and services are swapped on the premise of "social credit", with residents trusting that the favours will be repaid. A member of the beekeeping community group indicated that they give medicinal honey free-of-charge to sick individuals in the community, because they must take care of one another and know that the favour will be reciprocated:

"(…) when someone becomes ill, we provide them honey, as our honey has medicinal properties (…) and we don't charge anybody… people here don't have money. We have to help each other, so we help them and trust they will help us."

In San Felipe, reciprocity extended between the members of the tourism cooperatives and their NSE. Through their cooperatives, tourism CBO partners can get social credits to satisfy personal or collective needs and desires. Reciprocity also extended to the NSE of tourism CBO partners by supporting their PEOs by integrating their services into their main tourism supply, such as by providing food and beverages on boat tours, by recommending their products and services to visitors, and by investing in their ventures.

7.5.3 Exchange

The application of solidarity in exchange results in fair trade, or in this case, fair tourism. One way in which this manifests is in the form of market regulation to coordinate local initiatives, which reduces intermediaries' costs and results in the personalisation of producer-customer relationships (Coraggio, 2011b).

In terms of fair trade, the members of the tourism CBOs in Chunyaxche and San Felipe refused to revise and increase their prices in accordance with the costs and expenses associated with their operations, fearing that doing so would put them out of the competition with tourism companies offering similar services in nearby tourist destinations like Cancun, Playa del Carmen and Tulum. Thus, it is uncertain that tourism CBOs prices' comply with the fair trade principle. On the other hand, the Ejido 20 de Noviembre fostered fair trade by encouraging artisans to sell their crafts at prices that

cover not just their expenses but also the cost of their labour and a profit margin. Fair trade was made feasible by the facilitator making their training on pricing and costing open to the whole community – as described in Section 6.6.2–, during which the residents learnt to value their artisanship and to incorporate all of their expenditures in their pricing strategies. However, artisans who weave hammocks, the community's most "expensive" item, have occasionally sacrificed their labour costs to sell to visitors who demand discounts or lower prices:

"(…) because hammocks are (…) expensive, we haven't sold anything in months (…), the price of my hammocks includes the cost of the silk threads and my wage for the fifteen days it takes me to complete each hammock (…). I gave him [a tourist] a discount because we haven't sold anything in months. I know I gave away my labour, but I prefer that to earn some money now (…)."

Fair trade is linked to the principle of reducing intermediation costs, which became predatory and burdensome for small-scale tourism companies in the Yucatan Peninsula. Currently, the region's tourism market is monopolised by wholesale travel agencies that provide a wide variety of tourism-related services to travellers from their departure point. For small-scale tourism organisations to connect with tourists, they must bear the expenses of intermediaries. This is a reflection of the state of Quintana Roo's Minister of Tourism:

"Wholesalers and all-inclusive hotels have completely co-opted the tourism market. So, a scuba diving tour guide, for example, cannot spend all of his budget on advertising to attract tourists, (...) when he only provides scuba diving excursions. As a result, he need intermediaries, (...) therefore, he pays between 50% and 52% of his sale price in distribution. If a trip costs $100 USD, it is certain that $50 USD were spent on sales commissions and the remaining $50 USD were spent on production. Then he must increase his prices, or he will be out of the 'game,' as he will have no profit, since he will keep only 12-15% of earnings and will have to pay taxes as well. Worldwide, the average commission is roughly 12-17% of the sale price, while here on the Yucatan Peninsula, we average 50-52% (…)"

To offset distribution costs, a tourism CBO in Chunyaxche, a cooperative in San Felipe, and all of the community groups in Ejido 20 de Noviembre collaborated with tourism CBOs in other communities to establish the tourism networks Maya Ka'an, Co'ox Mayab, and Visit Calakmul respectively.

The CBOs in 20 de Noviembre, rely heavily on the tourism network Visit Calakmul and, to a lesser extent, on guests who come to their community independently. This enabled the personalisation of relationships between producers and consumers, resulting in the development of additional services such as temporary accommodation and food and beverage provision.

In San Felipe, the CBOs receive guests who arrive independently and, to a lesser amount, *via* the Co'ox Mayab network, which seldom sends tourists to this community. Additionally, one of the tourism CBOs' members attended small tourism fairs to attract new consumers. Tourism CBOs personalise their interactions with guests by providing additional services such as food and refreshments on boat excursions.

Conversely, one of the largest cooperatives in Chunyaxche relies on intermediaries such as tour operators and travel agencies to connect with the tourism market. The two smaller cooperatives rely on 'independent' travellers to the NPA, as well as independent tour guides who bring people to the community, but they have all been required to pay commissions to their distributors. The only CBO capable of reducing intermediation costs was the financially-benefitted CBO, as it received sufficient resources from the tourism facilitator to advertise in the tourist destinations of Cancun, Playa del Carmen, and Tulum, and possesses the equipment to transport tourists from these destinations to Sian Ka'an. Figure 7-9 illustrates a billboard commercial. According to the president of this CBO, they receive very few tourists through the Maya Ka'an network.

Figure 7-9: Billboard advertisement of the financially benefitted CBO in Chunyaxche

7.5.4 Money as a means and not the end

According to Coraggio (2011b), the principle of money as a means and not the end entails the creation of social coins to strengthen the social tissue. While none of the researched communities have implemented a social coin, the main objective of the host populations pursuing tourism ventures or complementary services, is the achievement of livelihoods and the fulfilment of their CLPs.

None of the interviewees indicated that they had a desire to accumulate wealth, except for the president of the financially-benefitted CBO in Chunyaxche, whose president revealed a desire to accumulate profits. However, the rest of the cooperatives focused on the objective of achieving livelihood.

The only community that is using tourism-related financial gains to fulfil its CLPs is San Felipe. This occurred with the merger of the three CBOs into a single organisation, an "*integradora*", and through it, the members of the tourism CBOs accumulate resources to invest in CLPs that integrate their NSE.

7.6 The fourth sphere of gains: Solidarity in the Coordination of the Economy

Coordination of the economy implies the organisation of the communities' economic activities, and the implementation of solidarity to this economic process entails the application of the principles of: a) community, b) market regulation and c) collective planning (Coraggio, 2015).

The three communities showed varying degrees of solidary economic coordination. The Ejido 20 de Noviembre displayed a high level of solidarity in their economic coordination, due to their *ejidal* organisation. During their monthly assemblies, *ejidatarios* democratically voted on the strategies and actions they needed to take to protect their local economy and fulfil the CLPs. Additionally, this community coordinated their tourism-related economic activities with all the communities in the municipality of Calakmul, to increase the complementarity of CBT in the region.

In San Felipe, solidarity in coordination occurred between the main economic activity of the community, fishing, with tourism goods and services supplied by the tourism CBOs and PEOs, enabling the integration of a CBT value chain. Additionally, the community's inhabitants joined efforts to exert pressure on the municipal government, and compelled the local authorities to preclude the entrance of external investors into San Felipe, with the intention of protecting the local economy.

Conversely, in Chunyaxche, the laws imposed with the establishment of the Sian Ka'an NPA hindered the majority of the host population from participating in tourism. Consequently, solidarity in

coordination was restricted to that between the tourism CBOs and the few PEOs that supported tourism workers.

7.6.1 Community and collective planning

The principle of community entails pursuing the voluntary complementarity between the economic activities within a community, or amongst different communities, according to the local culture. Collective planning entails democratic decision-making for economic organisation as well as for the prevention and mitigation of negative economic effects (Coraggio, 2011b).

In San Felipe, tourism CBOs developed informal partnerships with PEOs that belonged to their NSE, in order to promote the consumption of the tourism goods and services offered in San Felipe. This enabled the integration of a CBT value chain, which comprised main tourism services: boat tours as well as the complementary services like temporary lodging; food and beverages services (mainly supplied by the local fishing sector); commercialization of local crafts; and retail.

The residents of the Ejido 20 de Noviembre, organised their economic activities through democratic decision-making processes to seek complementarity between the core CBT activities (crafts workshops and tours to Rio Bec archaeological site), with the intention of integrating them into the local CBT value chain. To foster this integration, the *ejidal* council allocated community's resources to support the construction of suitable guest rooms – with beds, and having bathrooms with toilets– to enable households to provide temporary accommodation, as well as giving resources to families to provide adequate areas to serve food and beverages to guests. The *ejido's* sawmill also loaned its work vehicles – quad bikes – to the local guides who took visitors to the archaeological site. Additionally, the *ejidal* organisation started building two cabins to increase the community's temporary accommodation capacity in anticipation of an increase in the influx of tourists to the community.

At 20 de Noviembre, the principle of community was extended to the rest of the communities in the municipality. Each of the tourism CBOs in the *ejido* promoted not only the tourism supply of their own community, but also the tourism goods and services offered in the other four communities that belonged to the Visit Calakmul network. Additionally, representative of the artisans in the area promoted the whole tourism supply of the municipality (84 communities) in their events as organised by local government (detailed in section 7.3.2).

Conversely, the principle of community was non-existent in Chunyaxche, as the majority of the local population could not participate in CBT and their traditional economic activities have been weakened to favour tourism. Additionally, the division created by the tourism facilitator (detailed in section 6.4.2)

between the tourism CBOs inhibited the participation of three of the four cooperatives in the tourism network of Maya Ka'an. The principle of collective planning was therefore limited to CBT and the tourism CBOs, which implemented solidary agreements to organise their operation as seen in section 7.4. However, the three unfunded CBOs in Chunyaxche, established alliances to offset the costs of the mandatory trainings required for permission renewal.

7.6.2 Market regulation

Market regulation involves the social organisation of the economy to prevent destructive economic practices, and fosters the de-commodification of labour, nature and money.

In San Felipe, a high level of market regulation existed, since its populace took collective action against the municipal and state governments to prevent external investors from entering their community, with the intention of protecting their local economy.

Similarly, Ejido 20 de Noviembre presented a high level of market control due to its *ejidal* organisation. The residents of this community agreed to establish a voluntary NPA, that covered 70% of their territory, and therefore they could only use 30% of their land for timber, agricultural activities, and parcelled property. This enabled the community to safeguard the environment and de-commodify its natural resources, while also limiting private investors' entry. However, due to the community's severe marginalisation, numerous *ejidatarios* were compelled to sell their "parcelled" land to external investors, though it was still felt that external influence remained limited. In an informal conversation, the *ejido*'s leader stated the following:

"(…) I always advise the others (residents of the ejido) not to sell their land to outsiders, but they are desperate. You can buy a hectare for $5,000 MXN, which is nothing… but people need money and that is the only thing they own. But, in the ejido, we are constantly advice people not to sell, and we protect the majority of land under the voluntary NPA, so that it is neither destroyed nor lost."

Chunyaxche lacks market regulation due to the influence of external investors attracted to the community. This influence is due in part to its proximity to the famous tourist destination of Tulum (located twenty kilometres north of the community). The establishment of the NPA, which shrank the residents' livelihoods, forced *ejidatarios* to sell their land to external investors interested in developing tourism enterprises in the territory. These private investors completely disregarded the residents of Chunyaxche, as they hired their workers in Tulum, arguing that the local inhabitants lacked the necessary qualifications: proficiency in the English language, secondary and preparatory educational degrees, and "good" presentation, to name a few. Additionally, the residents lacked the necessary

resources to compete with the external investments, thus their participation remained limited. Figure 7-10 illustrates the distinction between the infrastructure owned by external investors and local residents.

Figure 7-10: External investors (left) vs local PEO's (right) in Chunyaxche

7.7 The fifth sphere of gains: Implementation of Transversal Solidarity Principles

The SSE is built on solidary principles that govern all economic activities. These principles include: a) free initiative and socially responsible innovation; b) diversity; c) non-discrimination of people and communities, d) synergy and e) territoriality (Coraggio, 2015).

Through interviews and participant observation, I discovered that only in the Ejido 20 de Noviembre were these four transversal principles applied to its local economy and to the economic relationships with the municipality of Calakmul's other eighty-three villages. On the other hand, these transversal principles were found to be only partially applied in San Felipe due to the community's *machista* mentality, while the community of Chunyaxche has not yet applied these principles at all, due to the failures identified in Chapter 6.

7.7.1 Free initiative and socially responsible innovation and Diversity

Free entrepreneurship and socially responsible innovation imply that each resident of a community has the freedom to engage in the local economy, and launch new economic initiatives driven by emulation and solidarity rather than rivalry. Diversity comprises the acceptance of multiple organisational structures for labour and property (Coraggio, 2011b).

In Chunyaxche, failures of T4D initiatives curtailed the local population's ability to engage in CBT through the creation of complementary services to those offered by tourism CBOs, thereby precluding free initiative and socially responsible innovation. Additionally, the tourism facilitator's requirements, which compelled the establishment of cooperatives, inhibited the implementation of the principle of diversity by prohibiting other types of work and property organisation.

The tourism cooperatives in San Felipe restricted free initiative and socially responsible innovation, arguing that, as pioneers of CBT in the community, they should be the 'owners' of the key tourism services. They nevertheless did allow involvement in tourism to members of their NSE. Cooperative members encouraged a variety of different types of labour and property organisation, as long as the members of their NSE participated in the creation of the new PEOs.

Conversely, the *ejidal* council of the community 20 de Noviembre encouraged the establishment of new PEOs, to strengthen their traditional economic activities (timber and agricultural) and facilitated the creation of PEOs which supplemented the community's core tourism services, irrespective of whether or not they were members of the NSEs of the tourism CBOs,:

"The ejido leader is helping me get the materials (…) I'll build a room to hosts visitors that want to stay overnight (…) I need the construction material and other ejidatarios will help me build the room and a bathroom with a toilet. (…) we are allowed to offer accommodation services if we have rooms with beds (instead of hammocks) and a bathroom with toilet (…) it's for visitors' comfort (…) I am just waiting my turn to get the materials, (…) maybe next week they'll give them to me, there are other households waiting to receive help too."

Because the T4D initiatives did not enforce a cooperative model in this community (as discussed in 6.6.3), it fostered plurality in terms of the forms of property ownership and work organisation available within the CBOs and PEOs of the *ejido*.

7.7.2 Non-Discrimination against individuals and communities

The transversal principle of non-discrimination strives towards symmetry in all relationships, regardless of ethnic origin, community, gender, religion, or any other protected attribute (Coraggio, 2011b).

The development of CBT in Chunyaxche was a critical instrument for the Mayan population to create employment for their own people, and as a result, tourism CBOs recruit either from the Mayan population or from other indigenous inhabitants. However, no women work in tourism in any of the community's four cooperatives.

In San Felipe, results of the application of the principle of non-discrimination are not observable, since members of the tourism CBOs and the fishing cooperatives (mostly men), openly discriminate against women and marginalised members of the community that do not belong to their NSE (as seen in section 7.3.2). Only one woman works in a tourism CBO and she indicated that she is often harassed by her colleagues:

"Yes, they [the male members of the tourism CBOs] bothered me (…) they have said that this is a job for men, and that I don't belong here (…) Others have insulted me by saying that I am only half woman because I am gay (…) which enraged me and ended in a fist fight with them. But this is common, I try to ignore their opinions (…). "

Ejido 20 de Noviembre is the only community that has championed gender equality, since women were not only active members of tourism community-based organisations, but frequently led them. The women invested their "free time" — that is, time not spent cleaning their homes or raising their children – in their craft workshops while their spouses engaged in the more traditional economic activities of agriculture and timber; though some men were actively involved in the manufacture of handicrafts as well.

Figure 7-11: Gender equality in CBT in Ejido 20 de Noviembre

7.7.3 Synergy and Territoriality

The synergy principle promotes collective efficacy through the integration of economic activities into productive chains that satisfy communal requirements. The principle of territoriality prioritizes preservation of the social fabric according to geographical proximity and fosters self-management of the territory and its natural resources for the benefit of the community (Coraggio, 2011b).

In Chunyaxche, the dimensions of failure of T4D initiatives hindered the establishment of new PEOs that complemented the primary tourism services, while the weakening of the community's traditional livelihood strategies (agricultural, timber, and fishing) due to the creation of the NPA, prevented their inclusion in the CBT value chain. The community was unable to apply the principle of territoriality with the establishment of the NPA, as they lost access to some of their previous territory. Additionally, the influence of external investors drawn to the community due to its proximity to Tulum prevented the *ejidal* council from managing their resources in accordance with their CLPs.

Synergy occurred partially in San Felipe, but it was restricted to being amongst members of the NSE of the CBO's partners who developed PEOs that supported the core tourism services: craft production, provision of temporary accommodation, and food and beverage services. However, the community was unable to adopt the principle of territoriality, as San Felipe is surrounded by two NPAs, and, like Chunyaxche, the local authorities lacked the legal power to manage their territory and members of the community required licences to operate in these places meaning that they lacked autonomy.

The *ejidal* council of 20 de Noviembre fostered synergy and complementarity between tourism CBOs and PEOs. The community leaders allocated resources for the construction and upgrading of spaces in the houses of community inhabitants to enable them to provide temporary accommodation and food and beverages to tourists (as seen in section 7.7.1). Additionally, the workshops utilized natural resources available in the community that are either underutilised or entirely neglected in their traditional activities (timber and agricultural activities). The *ejidal* council strived to safeguard their territory through the creation of a voluntary NPA that restricted the amount of land, which could be used for timer or agriculture, in order to preserve the community's natural beauty and attract tourists.

7.8 Conclusion

As this chapter has demonstrated, the implementation of CBT generated unforeseen gains. However, these gains are frequently overlooked by practitioners and academics in this field, since they contradict capitalist logic, but nonetheless contribute to the fulfilment of CLPs. Identifying these gains

required an in-depth understanding of the researched communities' ontologies; their experiences with T4D, and a shift of viewpoint that included what the inhabitants' value and the outcomes that they believe tourism should deliver. The three researched communities, present differences in the reach of the observed gains, in part, due to the fact that the T4D dimensions of failure manifested to varying extents in each locality. However, what gains there are contribute, to a greater or lesser extent, to the fulfilment of the community's life project (CLPs) in each case. The gains include the growth of critical resources – psychological, social, and information – necessary for fulfilling CLPs and, the incorporation of solidarity principles into economic practices. In two of the three cases studied, solidarity did not emerge spontaneously, nor was it an intrinsic characteristic of the communities' social and economic relationships; rather, it emerged as a political instrument for resolving conflicts and reducing tensions between members of tourism CBOs that were caused by CBT's reduced tourism capacity (Lopez Cordova, 2014).

The identified benefits form a taxonomy that comprises five sphere of gains. The first sphere of gains encompassed the increase of psychological, social, and information resources, which, according to interviewees, improved their capabilities to achieve livelihoods and empowered them to challenge external actors – tourism facilitators, governmental authorities, and external investors – in an effort to protect their local economies and fulfil their CLPs.

The second sphere of gains was the implementation of solidarity principles in tourism provision, which involved the economic processes of production, distribution, and redistribution, as well as consumption (because tourism is consumed at the moment of production). This domain of gains emerged with conflict, as members of tourism CBOs established solidary agreements to quell rivalries and foster conditions that would guarantee that all CBOs had equal opportunities to consolidate tourism as a new source of income.

The third realm of gains entailed incorporating solidarity values into the process of resource and earnings circulation throughout the communities' economies. At this stage, solidarity spread beyond tourism and included population groups that were part of the NSE of the members of the tourism CBOs. The most prominent gains in this field included an increase in reciprocity in the social and economic relationships of the residents of the researched communities, the promotion of fair-trade tourism, and the reduction of intermediation costs.

The fourth sphere of gains was the solidary coordination of the local economies. This occurred through the democratic and collective planning of the communities' economic activities, which entailed fostering the creation of economic ventures that supported the primary tourism services, and integrating the traditional economic activities into CBT's value chains. At this stage, the defence of the

local economies became paramount, and the residents of the researched communities united to preclude or restrict the entry of external investors that could potentially displace them.

The fifth level of gains consisted of the adoption of solidarity principles that propagate throughout the local economies. These principles include free initiative and socially responsible innovation, pluralism in forms of social organisation of work and property, non-discrimination, synergy, and territoriality, which enable any inhabitant in a community to participate in their local economies. However, this sphere of gains was only observable in the Ejido 20 de Noviembre, since the dimensions of failure of T4D initiatives in Chunyaxche and San Felipe, along with San Felipe's *machista* culture, impeded the implementation of the transversal solidarity principles.

The following chapter recollects the academic contributions of this thesis and delineates a pathway to improve T4D scholarship, by providing a grassroots perspective on T4D. This approach required not just understanding the stories of exclusion of marginalised individuals from CBT and T4D, but also the recognition of the ontologies that define the economic, social and environmental relationships of inhabitants of tourism-embracing communities. This bottom-up approach enables T4D initiatives to fulfil CLPs.

8 Conclusions: A grassroots perspective in Tourism for Development

8.1 Introduction: A critique of tourism for development

This thesis contributes to the critical study of tourism for development (T4D) by analysing the experience of three distinct communities with community-based tourism (CBT) on Mexico's Yucatan Peninsula, which is Latin America's most heavily touristed region. Through semi-structured interviews, participant observation of tourism operations and community life, and participatory network diagrams of economic relations, it was possible to gain a better understanding of tourism from the perspective of the host communities and thus contribute novel theoretical frameworks to T4D and CBT scholarship. These theories relate to sustainable livelihood strategies (SLS) and Latin American debates on the Social and Solidarity Economy (SSE). These theoretical frameworks allowed me to advance the discussion on situated T4D derived from the Brazilian experience on CBT development, based on the Mexican tourism experience. To my knowledge, this is the first study to provide a grassroots perspective on T4D through a comparative qualitative investigation of the experiences of three distinct communities in Mexico with long-standing CBT expertise. SLS theories enabled identifying the exclusion of the chronically poor from T4D in each community, which led to the identification of failures in T4D initiatives that hinder community engagement and community leadership in tourism. The application of SSE made it possible to recognise the local ontologies, the systems of values and rules that shape the social, economic and environmental linkages of the communities studied. This enabled the definition of 'development' as conceived by the residents of tourism-embracing communities, which is conceptualised in this investigation as communities' life projects (CLPs). The SSE allowed acknowledging the local cultures of reciprocity and solidarity that define the social and economic behaviour of the communities' inhabitants, as well as identifying solidarity as a mechanism that enable the distribution of tourism-related gains among the broader population in each community, including those who were initially excluded from T4D initiatives. The application of the SSE to T4D represents a novel contribution to both the T4D and SSE literatures. For the T4D scholarship, applying the SSE to tourism enabled me to develop a taxonomy of non-monetizable CBT gains that facilitate CLPs fulfilment. As far as I am aware, this is the first time Coraggio's (2011b) framework for the SSE's guiding principles has been operationalized and the use of tourism to illustrate the SSE's construction is an innovative contribution, as this sector is frequently overlooked by SSE proponents due to its neoliberal orientation.

The selected theoretical lenses that were employed enabled the analysis of primary data collected during fieldwork to address the following research questions: Are there unrecognised benefits from adapting CBT to the reciprocity and solidarity cultures of the host communities? Are there

unrecognised barriers in T4D initiatives that inhibit 'development' as defined by the host communities? How have the unrecognised gains of CBT expressed themselves in the communities that embraced tourism? Three chapters explored the responses to these questions: Chapter 5: The Tourism Gains in Practice: Trajectories to the Fulfilment of Communities' Life Projects, Chapter 6: The Dimensions of T4D Failures, and Chapter 7: A Taxonomy of Gains: Tourism for the fulfilment of Communities' Life Projects.

Interviewing the residents of the studied communities, through participant observation and participatory mapping of the research participants' socioeconomic relationships, I depicted the distinct stories of SSE creation in each community and I was able to define their CLPs. These stories are described in Chapter 5. By hearing the divergent viewpoints on CBT held by tourism facilitators, government officials, and residents of the examined communities, I identified dimensions of failure in T4D initiatives that are currently unrecognised in T4D scholarship. Chapter 6 examined these findings. The thorough study of the experiences of the residents in the communities that embraced CBT as a new livelihood strategy, and the application of the SSE to the communities' social and economic interactions resulted in the production of a taxonomy of CBT gains for the fulfilment of CLPs, which is discussed in Chapter 7.

Non-monetizable gains appeared in a variety of ways and to differing degrees in each of the communities studied. These benefits consist on the distribution of the tourism-related gains across the members of tourism community-based organisations (CBOs); the expansion of the popular economy (PE) and the integration of CBT value chains; and the fulfilment of CLPs. However, internal factors, such as the preservation of the communities; traditional economic vocation, social organisation of labour, and other cultural forms of organisation that generate exclusion affected the presence of gains and CLPs in each community. External factors like the severity of T4D failures also shaped the permeation of the gains for CLPs and contributed to the identification of three trajectories for the construction of a SSE: The Paradox of CBT Success and SSE Confinement; Cooperativism as an SSE principle; and CBT Adaptation to Ejidal Organisation for CLPs.

I demonstrated that T4D initiatives implemented in the examined communities frequently disregarded the legitimate needs and desires of host community members, effectively excluding the majority of the towns' population from CBT. The conflicting viewpoints of tourist facilitators, government officials, and community members demonstrated that T4D efforts aimed to enhance tourism facilitators' goals rather than to enable tourism to fulfil CLPs. These findings resulted in the establishment of four dimensions of failure that prevented CBT from contributing to CLP. These dimensions of failure are as follows: 1) Convenience in CBT imposition and arbitrary selection of

communities; 2) Disassociated efforts among stakeholders; 3) Stringent requisites and regulations as barriers to T4D; and 4) Inadequacy in T4D capacity building. These dimensions of failure revealed that the goals of tourism facilitators and donor organisations guided CBT implementation. This resulted in the allocation of resources and efforts to communities and tourism community-based organisations (CBOs) that could provide them with the greatest visibility, rather than investing in strategic activities that would strengthen CBT and the overall livelihood strategies performed in the communities.

Nonetheless, inhabitants of the three researched communities adapted CBT to their reciprocity and solidarity cultures, resulting in unanticipated gains from CBT that differ from the capitalist logic of wealth accumulation, but contributed to the fulfilment of their CLPs. The discovery of these gains needed a paradigm change in the study of T4D and CBT, away from the views of academics and practitioners and toward the perspectives of T4D initiative recipients. By comprehending the host communities' notion of 'development', referred to in this thesis as CLPs, and by recognising the values that shape the social and economic relationships of the inhabitants of the communities and enabled them to achieve their livelihoods, I elaborated a taxonomy of CBT gains for CLPs. This taxonomy consists of five spheres of gains, which included the development of residents' psychological, social, and information resources, which are critical for implementing the CLP and incorporating solidarity practises into their social and economic relationships, which contributed to the SSE's development (Coraggio, 2011b). While solidarity was first employed as a political tool to resolve disputes caused by CBT's limited load capacity, it progressively permeated each community's economic processes and activities.

In the next section of this final chapter, I review the fundamental academic contributions of this doctoral project, followed by the recommendations for policy and practice. Then I discuss potential areas for further research and provide the final concluding remarks of this investigation.

8.2 Academic contributions: A grassroots perspective in Tourism for Development

This section presents the contributions of this investigation to the existing literature on T4D and SSE. This section highlights the main academic contributions of this investigation at the theoretical, methodological and empirical levels.

8.2.1 Theoretical contributions

The first theoretical contribution of this thesis is providing a grassroots perspective on the development outcomes of T4D. This was a necessary step to unveiling the barriers that hinder CBT from fostering 'development' according to the perspectives of the residents of tourism-embracing communities, as well as to the discovery of 'alternative' benefits that T4D generated. It was vital to understand what 'development' meant to the host communities' residents. This required to use an alternative to development approach, that further the conversation on situated approaches to CBT developed by critical T4D scholars in Brazil (De Azevedo Irving, 2009, Bartholo, 2009, Bartholo et al., 2008, Nechad, 2019). While T4D is supposed to be centred on the host communities and their sustainability, tourism initiatives in Mexico are normally inattentive of CLPs. Therefore, firstly I had to understand what the residents of the researched communities expected as desired development outcomes from tourism. The multiple statements my interviewees made related to a different definition of development to tourism facilitators, as they indicated they desired to attain what SSE scholars define as *'la reproduccion ampliada de la vida'*, which in this thesis is translated and conceptualised as fulfilment of CLPs (Coraggio, 2017, Blaser, 2010) and is discussed in Chapter 5.

The second theoretical contribution was uncovering key causes exclusion from T4D initiatives. Numerous scholars have concluded that a significant number of sustainable tourism initiatives developed in Asia and Latin America had a reduced lifespan (Jamal and Dredge, 2014, Jamal and Camargo, 2014a, Lacey and Ilcan, 2015, Schilcher, 2007, Hampton and Jeyacheya, 2015). Some researchers attributed this to inherent flaws in the design of alternative sustainable tourism projects that encompass ecotourism, pro-poor tourism, and community-based tourism models. These weaknesses included inadequate tourism service provision that did not covered consumer demands; an absence of linkages to the tourism market; and poor governance of community-based organisations (CBOs) owing to inefficient collective management structures (Dodds et al., 2018, Mitchell and Muckosy, 2008, Wang et al., 2016). While academics acknowledge the need of community engagement and community leadership in T4D in situated tourism literature, they fail to analyse how the structure of T4D initiatives precludes community participation.

However, as discussed in Chapter 6, the four T4D dimensions of failure place the responsibility for CBT failure in the design of T4D initiatives and tourism facilitators' agendas. This adds to Lacey and Ilcan's (2015) conclusions on tourism as a postcolonial governmentality technology, while they suggested that host communities subjugated to tourists, the findings of this investigation suggest that the conditions imposed by T4D initiatives perpetuated post-colonial relationships that subjugated the host communities to tourism facilitators as well. In many cases, T4D initiatives aimed to substitute the

communities' traditional economic activities with tourism, to comply with facilitators' environmental conservation goals, rather than seeking to enhance people's lives (Mayaka et al., 2019, Alvarez, 2014a, Fayos-Sola et al., 2014). However, the small-scale nature of sustainable tourism models prevent it from generating sustainable livelihoods for a whole population. This makes necessary the coexistence of tourism with the community's main livelihood strategies such as agriculture, fishing, timber, and hunting. This enables the integration of CBT value chains that enhance local economies, a disregarded perspective in the T4D literature. These findings add to the academic arguments which stress that tourism should coexist with, rather than replace, the host communities' traditional economic vocations and the importance of applying a sustainable livelihood approach in T4D (Tao and Wall, 2009, Shen et al., 2008, Blackstock, 2005). This finding also expands the discussion on situated approaches of T4D, as this theoretical lenses indicates that is necessary the creation of mechanism that distributes tourism-related benefits to the wider population of tourism-embracing communities (De Azevedo Irving, 2009). The articulation of CBT value chains provides a pathway to address this.

While some academics have addressed the fact that T4D has failed due to a lack of financial sustainability, this body of knowledge has overlooked that this is related to the way tourism facilitators distribute resources for CBT implementation (Mitchell and Muckosy, 2008). The implementation of T4D initiatives prioritized tourism facilitators' survival over 'development'. As a result, the selection of communities for CBT based on facilitators' convenience, resulting in the concentration of resources within a limited number of communities and, in some instances, a small number of CBOs within those communities. The latter generated tension between the host populations, and in some cases, impeded CBOs' ability to achieve financial autonomy.

The dimensions of failure also add to the discussion of the critical nature of collaboration among the various actors involved in T4D (Wang et al., 2016, Wondirad et al., 2020). The fragmented efforts of tourism facilitators compromised the long-term sustainability of CBT. This disconnection impeded the communities from pooling available resources to invest in strategic activities such as promoting their offerings at tourism fairs that may have accelerated CBT's consolidation. Instead, tourism facilitators supported activities that made their actions easier to account for. Additionally, while sustainable tourism is portrayed as the new panacea for marginalised communities' development (2019), mainstream literature on T4D overlooks that these tourism models are frequently disconnected from national development goals. Often, governments neglect small-scale tourism development in favour of large-scale national programmes, jeopardising the long-term viability of CBT and the host communities' livelihoods.

According to research on T4D pitfalls, capacity-building is key for the long-term viability of CBT (Dodds et al., 2018). However, this literature seldom discusses the role of tourism facilitators in the training provision to tourism CBOs. Most of the training provided did not develop key skills such as costing and pricing, improving the quality of the tourism offering, but in many cases, it focused on westernising the CBOs, which in this case is to professionalise and corporatize their forms of organisation of work. This created tensions among CBOs' members as the imposed forms of social organisation of work jeopardised their livelihood strategies, and when westernisation was successful, it resulted in the loss of the CBOs' social purpose of fulfilling CLPs for capital accumulation (Devkota et al., 2020).

The third theoretical contribution of this investigation is the discovery of previously unrecognised gains generated by CBT in the researched communities and the adaptation of development initiatives to the local systems of values and norms that shape development in each site. These unmonetizable gains entail the development of the SSE and the fulfilment of CLPs. This scholarly work establishes a novel relationship between T4D studies and the Latin American discussion of SSE. In the three communities studied, members of tourism CBOs implemented strategic and solidarity practises in CBT, which reshaped their social and economic relationships, attenuated the tourism sector's neoliberal characteristics, strengthened the SSE and permitted the fulfilment of CLPs (Coraggio, 2015, Coraggio, 2016a). This contributes to the SSE scholarship, as overall this body of knowledge overlooks tourism as a potential sector where SSE can be developed (North et al., 2020, Villalba Eguiluz and Pérez de Mendiguren, 2019, Singer, 2007, Coraggio, 2017). This finding also contributes to situated development, as the SSE depicted the way to adapt T4D initiatives to the local cultures of solidarity and reciprocity that shaped the social and economic realities of the researched communities (Zaoual, 2007, Zaoual, 2002).

Mainstream T4D and CBT scholarship has centred on measuring the economic impact of sustainable tourism models in terms of economic growth, poverty and inequality reduction, economic spill over, and tourism influx (Croes and Vanegas Sr., 2008, Li et al., 2016, Llorca‐Rodríguez et al., 2017, Bartholo et al., 2008, Hampton and Jeyacheya, 2015, Mahadevan et al., 2017). Fewer researchers have defined sustainable tourism success in terms of the attainment of the environmental and "sociocultural" goals that tourism facilitators often advocated (Romero-Brito et al., 2016). However, these metrics define success in terms of tourism facilitators and other external stakeholders, highlighting a vacuum in T4D scholarship: the absence of a grassroots viewpoint on what 'development' outcomes CBT should produce in the communities that embrace it.

The concept of CLPs aided the development of a taxonomy of CBT gains that differs from the capitalist logic of wealth accumulation and sustained economic growth, which is used in mainstream T4D

literature to assess the performance of sustainable tourism models (Lee and Jan, 2019, Romero-Brito et al., 2016, Dodds et al., 2018). The taxonomy of gain developed here adds to the T4D scholarship, by accounting for non-monetizable advantages created by sustainable tourism models, identified due to the operationalisation of the SSE's guiding values in T4D. This is a novel application of this theoretical framework, since to my knowledge, the application of this framework has thus far been limited to describe Social and Solidarity Tourism Initiatives (SSTI), which focus only on the implementation of solidarity practises in tourism, such as volunteering, cooperative tourism, and fair trade tourism (Calvo, 2017). The gains from CBT discussed in Chapter 7 revealed that T4D efforts facilitated the development of psychological, social, and information resources, all of which are critical for achieving CLPs. The empirical findings indicated that members of tourism CBOs resorted to solidarity in order to manage conflicts arising as a result of CBT's limited tourism capacity. Members of CBOs reached agreements to equalise their chances of selling their tourism-related offerings to the few tourists that visited their communities, discarding competitive market behaviour in favour of solidary cooperation. This led to the incorporation of solidarity principles in many economic processes and activities in the examined communities, hence contributing to the construction of SSE. This facilitated the expansion of the popular economy while maintaining social fairness, so strengthening the social fabric via the promotion of reciprocal and collaborative social and economic relationships. This empowered communities to establish agreements that bolster their local economies and safeguard them from external actors' interference, fostering collective efficacy and contributing to the CLPs fulfilment (Jørgensen et al., 2020).

8.2.2 Methodological contributions:

This study adds to the nascent interpretevist approach in tourism research, as most of this body of knowledge is guided by positivist viewpoints. This investigation is also unique in adopting a grassroots perspective in tourism for development that was possible through the usage of ethnographically inspired methods, entailing interviews, participant observations and network diagrams of economic relations. These methods allowed understanding of what the inhabitants in the researched communities defined as development outcomes from tourism, instead of imposing my own. By focusing on the communities' perspectives on T4D I was able to extend the application of Blaser's (2010) term 'life projects' to conceptualise the objective of satisfying the communities' needs and legitimate desires through CBT, defined in this thesis as fulfilling communities' life projects (CLPs). To the best of my knowledge, this is a unique perspective in tourism for development research, as most

scholarship continues to use a top-down approach even when it attempts to bring concepts like social justice into tourism research.

This investigation also brings a second important methodological contribution. According to my understanding, this thesis presents for the first time, an operationalization of Coraggio's framework for the SSE's guiding principles (2011b), as CBT facilitated the application of solidarity practises that contributed to the fulfilment of the CLPs. The application of this framework into T4D is a contribution not only to tourism research, but also to the SSE body of knowledge, as this literature generally overlooks tourism. The application of this framework was useful as it enabled the dissection of the communities' economies into distinct economic processes as well as enabling the identification of alternative gains in each phase. To achieve this it was necessary to identify the social and economic interactions that members of tourism CBOs had with their networks of social exchange (NSE) and other members in their communities as well as with their environment. I did this by using participatory network diagrams of economic relations and complemented this, with information gathered during the interviews, participant observation and informal conversations with residents of the researched communities. Coraggio's framework as it is, is designed for sectors that produce goods and it does not apply to services, where the production and consumption phase occur simultaneously. Additionally, the members of the community decided to distribute and redistribute resources and gains at the moment of consumption. These differences led to the adaptation of the principles framework to the way that the communities operated CBT and the analysis of the production, distribution, redistribution and consumption phases had to be done in parallel.

8.2.3 Empirical contributions

Critical studies on T4D have linked the long-term viability of sustainable tourism models with community involvement in tourism development (Wondirad et al., 2020, Dodds et al., 2018). However, the literature has not examined the causes that discourage the participation of residents of rural and indigenous communities in tourism. The empirical findings of this thesis show that the multiple regulatory frameworks that overlap in rural and indigenous territories, as well as the stringent requirements that condition T4D resources inhibited community involvement in CBT. These restrictions excluded the community's most marginalised individuals, since tourism facilitators granted resources to CBOs with prior expertise and initial infrastructure. As a result, tourism was limited to the wealthiest members in the communities, reinforcing unequal power relations among its residents.

The gains manifested differently in each community, as they expanded to different population groups and economic activities. This resulted in varying degrees of SSE development and CLPs fulfilment. The different trajectories facilitated the identification of elements that enabled or restricted the development of the alternative gains discussed. These elements entail external causes, such as the severity of T4D's failures in each community. Internal factors also shaped the distribution of the gains, these causes included the preservation of communities' traditional livelihood strategies and their integration into the CBT value chain, as well as the forms of social organisation of work and cultural forms of organisation that result in the exclusion of population groups based on their gender or level of marginalisation. The identification of these factors constitute this thesis's empirical contribution, as these factors facilitate or restrict the diffusion of CBT gains for CLPs and add to the discussion of the importance of employing a livelihood strategy in T4D (Tao and Wall, 2009, Shen et al., 2008). The identification of these factors enabled the characterization of three distinct trajectories of SSE construction in each community: "The paradox of CBT success and SSE confinement" in Chunyaxche; "Cooperation as an SSE principle" in San Felipe; and "CBT adaptation to Ejidal organisation for CLPs" in Ejido 20 de Noviembre.

The paradox of CBT success and SSE's confinement alludes to Chunyaxche's story. Tourism facilitators and government officials have praised this community's CBT offering for its success in terms of year-round tourism intake and economic spill over. However, due to the failures of T4D initiatives, the majority of this community's population remain marginalised and excluded from CBT, and they saw their livelihoods deteriorate as a result of the establishment of the Sian Ka'an natural protected area (NPA). These failures hampered the growth of the popular economy and the integration of a CBT value chain. I found no evidence of the SSE or of the values of reciprocity and solidarity guiding the social and economic relations of Chunyaxche's population prior to the establishment of the NPA in 1986. This dearth of evidence is connected to the *ejidal* organization's severe fragmentation. This Ejido comprises around 600 *ejidatarios*, complicating democratic decision-making processes. Additionally, external investors attracted to Chunyaxche by its proximity to the world-famous tourist destination of Tulum facilitated the commercialization of *ejidal* rights, enabling investors to advance their own projects, which frequently compromised the community's well-being. Despite these factors, gains for CLP were found in this community, but they were concentrated among tourism CBOs, their workers, and the few PEOs that supply ancillary products and services. This resulted in the development of a SSE confined to the tourism sector in this community, but this did not reflect the pursuit of the CLPs at the time of data collection.

Cooperativism as a SSE principle depicts the trajectory of San Felipe. This community attracted visitors on weekends and during peak tourist seasons, but its tourism offering was mostly ignored by the

tourism market that arrived at the major tourist destinations, limiting CBT's expansion. This community had a minimal influence of T4D failures due to their incipient relationship with tourism facilitators, who allocated a limited amount of resources to CBT diversification and mostly served to connect the community to the tourism market. The cooperativistic values that governed this community's social and economic relationships permeated CBT, enabling the spread of gains amongst tourism CBO members and their NSE, which resulted in the formation of PEOs that offered complementary tourism services. However, cooperativistic principles did not preclude inhabitants who were not members of the tourism cooperatives' NSE from being marginalised. However, because these residents maintained their traditional economic activities, they acquired resources that enabled them to diversify their livelihood strategies through tourism, and establish PEOs that provided complementary services. This enabled gains to be distributed to people in the popular economy who provided supplementary and complementary tourism services, as well as to inhabitants engaged in traditional economic activities like as fishing and cattle raising, which were incorporated as ancillary sectors to CBT. This facilitated the strengthening of the SSE, which included the community's various economic activities, the articulation of a CBT value chain, boosted collective efficacy, and facilitated the pursuit of CLPs.

CBT adaptation to Ejidal organisation for CLPs describes the experience of Ejido 20 de Noviembre. This is another paradoxical example, since the community received a limited influx of tourists throughout the year, but CBT gains permeated the community's diverse economic activities and population groups. This is due to their *ejidal* organisation, preservation of traditional livelihood strategies, expansion of the popular economy, and the establishment of a CBT value chain. Owing to the community's *ejidal* structure, its residents are accustomed to incorporating reciprocity and solidarity values into their social and economic interactions, which infiltrated into their tourism related endeavours as well. The Ejido retained ownership of its territory, natural resources, and archaeological site, allowing its inhabitants access to tourism-related resources. Because of the region's significant marginalisation, tourism facilitators were unable to enforce regulations requiring certain forms of labour organisation, such as cooperativism. This allowed community groups to continue functioning in the informal sector, allowing more individuals to establish tourism CBOs. Tourism facilitators also allowed all Ejido residents to attend tourism CBO capacity-building training, thereby democratising knowledge. The limited tourism influx to the community prevented tourism from displacing their traditional economic activities, and therefore tourism became one of multiple economic activities that enabled the development of livelihoods. This facilitated the integration of logging and agricultural activities as ancillary sectors to CBT, strengthening the community's SSE. Additionally, the *ejidal* council allocated resources to the fulfilment of the CLPs by fostering the establishment of PEOs that

provided complementary services such as temporary accommodation, food and beverage provision for visitors, and enabling the integration of a CBT value chain that involved the majority of the Ejido's population.

8.3 Recommendations for policy and practice

This section aims to present ideas that can be useful for tourism practitioners, including tourism facilitators, donor institutions, tourism consultants and government officials that work in the implementation of T4D initiatives in marginalised communities in the Global South.

T4D initiatives provide key resources to marginalised communities, allowing them to diversify their livelihood strategies by incorporating tourism. However, the findings in this research support that a situated approach to T4D is key to enable the success of these development interventions (Zaoual, 2002). This requires that, rather than imposing or championing environmental goals, tourism facilitators must identify and establish T4D initiatives' objectives in collaboration with tourism-embracing communities. However, this is not enough, tourism facilitators need to acknowledge the systems of rules and values that govern social, environmental and economic interactions in each community, and adapt T4D initiatives to these systems instead of imposing western forms of organisation of work. Therefore, T4D initiatives should be designed and implemented following a bottom-up approach centred on the fulfilment of CLPs. This advocates for tackling the barriers that tourism facilitators and donor organisations create by requiring T4D initiatives to be completed in a short amount of time. This requires a different approach for evaluating the performance of T4D initiatives, one that does not rely on economic indicators but considers the CLPs. Using CLPs to measure T4D performance could promote collaboration among tourism facilitators and government institutions involved in the same territories, pooling resources to fund strategic initiatives that both strengthen CBT as well as the communities' sustainability.

As discussed in Chapter 6, the current design of T4D initiatives excludes the majority of the community's inhabitants from CBT, as tourism facilitators only allocate resources for tourism development. To offset this exclusion, T4D initiatives should take a sustainable livelihoods approach that facilitates the development of CBT value chains that integrate traditional livelihood activities like agriculture as ancillary sectors for the tourism sector, and foster the creation of popular economy organisations that provide complementary goods and services for CBT.

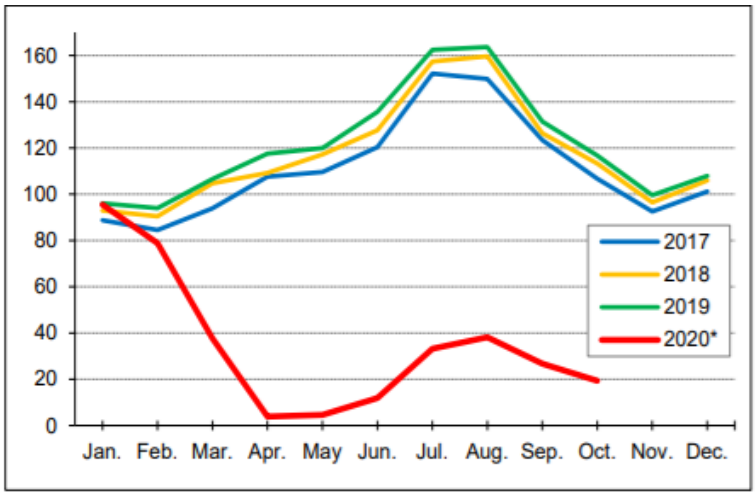
This implies a decrease in the requirements and regulations imposed by tourism facilitators and government institutions that overlap in indigenous and rural territories. Reducing laws and

requirements for residents of tourism-embracing communities can encourage more people to participate in CBT and foster the growth of the local economy. T4D initiatives should stop imposing western forms of work organisation – such as encouraging the establishment of cooperatives – and instead allow communities to adapt CBT into their ontologies. Finally, T4D programmes should include tactics that encourage the development of bonding social capital in order to prevent the exclusion of people who are marginalised in their communities, whether as a result of the ways they organise their labour or cultural factors.

8.4 Potential areas for future research

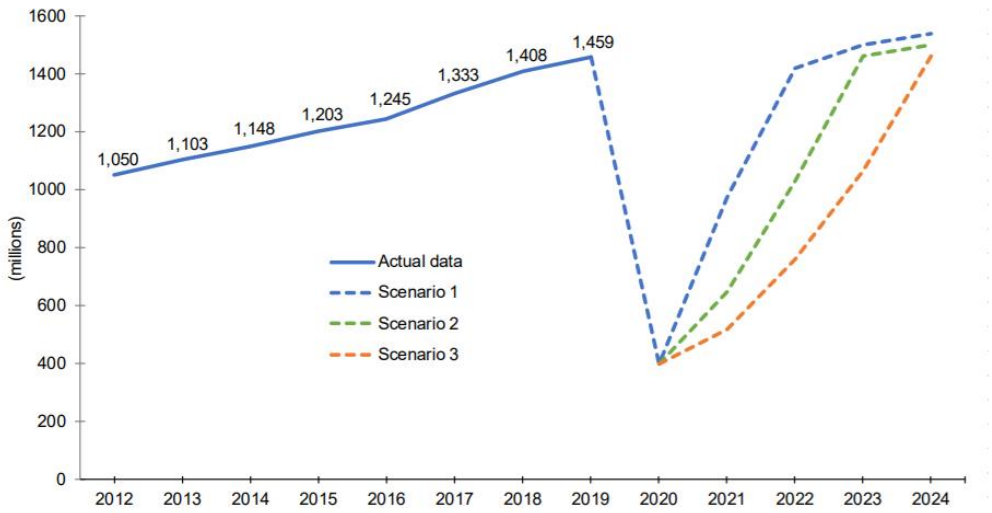
The COVID-19 pandemic has shown us that the current economic system is unsustainable, as it is reliant on perpetual consumption for its survival (Lewis and Conaty, 2012). This same rationale applies to tourism and its sustainable models such as CBT; without tourists consuming, tourism would perish. However, the COVID-19 pandemic has had a profound impact on the number of international travellers, due to the restrictions imposed by many countries in the world that included controlling movement of people, imposition of lockdowns and closure of airports and national borders. Tourism was one of the most –if not the most- damaged economic sectors and saw a drop of 73% of international travellers in comparison to 2019, and from January to May 2021 still presents an 83% reduction of tourist influx in comparison to the same period in 2019, as shown in figure 8-1 (UNWTO, 2020, UNWTO, 2021). As Jenkins (2015) mentioned, tourism is a resilient sector as it has recovered from the impact of economic, political and security crises as travelling has become part of people's leisure activities, and after COVID-19 it will do it again.

Figure 8-1: Worldwide International Tourist Arrivals per month (million) elaborated by UNWTO (2020)



While in 2020, the reduction of travellers sets the tourism sector to levels of thirty years ago, in December 2020 the UNWTO forecasted that the influx of tourists would rebound with the ease of restrictions worldwide during 2021 and recover the 2019 pre-pandemic levels in 2024, as shown in figure 8-2 (UNWTO, 2020). By July 2021, the influx of international tourists still presented a weak recovery due to the uncertainty created by the constant change of travel restrictions; however, national markets are driving tourism recovery, especially in countries with large populations (UNWTO, 2021).

Figure 8-2: International Tourist Arrivals - Scenarios for 2021-2024 elaborated by UNWTO (2020)



The COVID-19 pandemic accentuated the vulnerabilities that the tourism sector produced in the geographies that rely on it, since their primary economic activity was abruptly paralysed. This is particularly concerning in marginalised and indigenous communities, where alternative tourism models such as CBT were implemented with a top-down approach that aimed to replace their traditional economic activities. This has consequently left local economies vulnerable in the current situation. This demonstrates the critical need for further research that examines T4D through theoretical lenses that assist in framing tourism as an economic activity that contributes to the development of sustainable livelihood strategies and supports the achievement of CLPs.

Further research on the political economy of tourism, particularly on CBT and T4D scholarship, is essential. It is necessary to continue applying situated approaches to T4D and CBT in different communities in the Global South to identify pillars that can strengthen T4D interventions according to each site's ontologies. Additional research on communities with tourist-driven economies that takes into account the strategies applied during and 'after' the COVID-19 pandemic's impact, may show additional failures in T4D that have not been identified in this investigation. Examining the researched

communities' experiences during and after COVID-19, would allow an assessment of whether the CBT gains for CLPs persisted or deteriorated, and which mechanisms safeguarded the gains during this crisis.

This thesis makes contributions based on data acquired at the end of 2018 and in the first quarter of 2019, prior to the COVID-19 pandemic. Due to the communities' lack of connectivity, it was difficult to track the trajectories of their livelihood strategies amid the present health crisis, a scenario that is also beyond the scope of this investigation. Nonetheless, the anticipated recovery of the tourism sector and the accentuation of tourism's vulnerabilities reveal a new gap in the T4D literature, the impact of the pandemic on marginalised and indigenous populations who were heavily reliant on tourism for livelihood.

While not addressed in this thesis, the three communities researched shared two challenges that jeopardise the long-term sustainability of CBT and require additional research: the entry of Fair-trade intermediaries and their influence on the communities, and the disengagement of younger generations from tourism.

Throughout my data collection, I identified few "Fair Trade" tour operators who began collaborating with various tourism CBOs in different communities. These intermediaries transfer their commissions from tourism CBOs to the tourism market. The amount of tourists these organisations channel into the communities is reduced, but these intermediaries might exert influence over the tourism CBOs with the aim of “westernizing” their operations through training. Currently, fair trade tour operators condition the commercialization of the CBOs’ tourism offering to the implementation of the "best practises" they recommend during their training. Additional research is needed to determine the influence that these external stakeholders have on host communities, since they might prolong post-colonial relationships and contribute to T4D's failure.

The second challenge is the likelihood of CBT initiatives failing to sustain themselves owing to the low level of engagement of local youth in tourism CBOs. Members of tourism CBOs and PEOs that complement and supplement the primary tourism offering are led by older generations in each of the three communities. By being these empirical entrepreneurs, the absence of engagement of younger generations in tourism compromises CBT's long-term viability. Numerous community members interviewed claimed that tourism assisted them in keeping their children in school, from elementary to graduate level. This demands further research, since CBT may be a temporary or a single-generation livelihood strategy that enables inhabitants of host communities that participate directly or indirectly in tourism to meet their CLPs, and it might not entail the maintenance of tourism as a permanent livelihood strategy.

8.5 Conclusions: A grassroots perspectives in Tourism for Development

This thesis furthered the discussions on situated approaches to T4D and provided a grassroots critique of T4D based on an investigation of the voices of inhabitants of CBT-embracing communities in Mexico by using ethnographically inspired research methods. Residents' viewpoints demonstrated the need to include SLS frameworks into the practice and study of T4D to understand the factors that exclude people from tourism interventions. Additionally, their perspectives on the benefits that tourism generated in their communities laid the groundwork for utilising the SSE to adapt CBT to their cultures of reciprocity and solidarity, as well as identifying non-monetizable gains created by CBT that helped them to achieve their CLPs.

The residents' viewpoints on the perceived benefits from tourism, allowed me to extend the term life projects coined by Blaser (2010 p.p. 2), in a second way. I used the term 'community life projects' (CLPs) to conceptualise what SSE academics characterised as the reproductive rationale of satisfying communal needs and legitimate desires in particular societies (Villalba Eguiluz and Pérez de Mendiguren, 2019, Puig et al., 2016, Singer, 2007). Considering tourism in the light of CLPs development enabled the identification of gains that defy capitalist logic yet reinforce the SSE, so enabling the fulfilment of CLPs. However, the three studies examined demonstrated disparate trends in the dissemination of CBT gains for CLPs, showing the effect of external and internal factors on the outcomes in the communities that were studied. These factors include T4D failures, the preservation of traditional livelihood strategies, forms of social organisation of work, and cultural organisational structures that contribute to exclusion.

I expanded on the critiques of T4D that many academics have made, by juxtaposing the perspectives of tourism facilitators, government officials, members of tourism CBOs, and community residents (Dodds et al., 2018, Mitchell and Muckosy, 2008, Wang et al., 2016, Mayaka et al., 2019, Wondirad et al., 2020). The contradictions between their statements enabled the identification of four dimensions of failure intrinsic to T4D initiatives that prevented tourism from being a vehicle for 'development,' since these hindered the participation of the majority of the communities' inhabitants. However, as Baird and Gray (2014) noted, resources allocated through T4D initiatives were critical in facilitating the diversification of livelihoods, particularly for those living in extremely marginalised communities. This urges tourism practitioners and academics to continue directing resources toward CBT development, but through T4D initiatives that address these shortcomings and adapt to the host communities' cultures.

The findings of this thesis contribute to the discussion initiated by authors such as Tao and Wall (2009) regarding the relevance of SLS theories in T4D. For the host populations, tourism is a tool for diversification, not a substitution for their traditional livelihood strategies. Although the restricted tourist capacity of CBT precluded the entire population from participating directly in tourism, it can facilitate the integration of a value chain that includes supplementary and complementary products and services. This expands on the scholarship on situated CBT that indicates that it is necessary that tourism development interventions include mechanisms to distribute tourism-related gains to the broader population (Zaoual, 2007, Nechad, 2019, De Azevedo Irving, 2009). A T4D approach that incorporates SLS, and alternatives to development theories has the potential to involve a broader community in tourism, foster the growth of the popular economy, so strengthening the development of SSE and enabling CLPs to be fulfilled. This thesis has established the need to redesign T4D initiatives according to the communities' perspective of development and adapting tourism to the values and rules that govern their social, economic and environmental relations to enable the fulfilment of CLPs.

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