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Indigenous Tourism and Social Entrepreneurship in the Bolivian Amazon: Lessons from San Miguel del Bala

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Abstract

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The impact of community-based ecotourism is contingent upon the community's involvement in the development and management of activities, as well as their access to and the comprehensiveness of benefits. The ecotourism business owned by the Tacana Indigenous community of San Miguel in the Bolivian Amazon provides a model as to how Indigenous communities can harness social entrepreneurship to address economic, social, and environmental challenges. This article reviews the origins and development of this business, and draws on participant observation research, interviews, surveys, and economic analysis to illustrate the lessons learned and challenges faced. The findings are presented to inform existing and new Indigenous tourism ventures, policy considerations, and future research.

Keywords

social entrepreneurship, community-based tourism, sustainability, Indigenous enterprise, Tacana, Madidi National Park

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Indigenous Tourism and Social Entrepreneurship in the Bolivian Amazon: Lessons from San Miguel del Bala

Ecotourism is generally seen as an activity that generates economic and social benefits for local communities, as well as an alternative to other less sustainable practices of land use in natural ecosystems. However, while promoters of ecotourism suggest there is much support for community-based ecotourism ventures, it is difficult to find sustainable cases in practice (Scheyvens, 1999). According to Scherl and Edwards (2007), there are relatively few successful community-based management models and enterprises in practice, but these are increasing in numbers, especially in Latin America.

Historically, the presence of Indigenous-owned enterprises in international tourism has been limited. In recent years, however, Indigenous enterprises are increasingly seen as an important community development tool, in recognition of their economic contribution in bolstering stagnating rural economies and diversifying economic sectors, and their ability to unify community members (Briedenhann & Wickens, 2004; Fennell, 2003; Sproule, 1996).

Efforts in social entrepreneurship have paved a path for a different kind of involvement by transforming the historic expectation that Indigenous communities would be a foreign spectacle into a new reality as empowered entrepreneurs and owners. Through such practices, Indigenous tourism aims to address social, economic, and environmental challenges. Social entrepreneurship is the product of individual leadership, organizations, and networks, and this study analyzes how entrepreneurs in the Tacana Indigenous community of San Miguel in the Bolivian Amazon are working to provide benefits not only for their own ecotourism enterprise but also for their community, as the venture encompasses broad social, economic, and environmental goals.

This research contributes to the theory of social entrepreneurship and its practical applications to address social and environmental challenges. Also, this article will help advance the literature on and practice of Indigenous tourism, which tends to focus on day-to-day operations rather than the full life cycle, leadership, social entrepreneurship factors, and governance structures that lead to long-term success, sustainability, and biocultural diversity (Fennell, 2006; Hall, 2006; Epler Wood, 2008; Maffi & Woodley, 2010). This research explores how this Indigenous venture, San Miguel del Bala, is creating sustainable and transparent economic initiatives for the community.

The article is structured in five parts. The first reviews literature that guides the evaluation of San Miguel del Bala. The second covers the background and origins of tourism in San Miguel. The third section examines the evolution of the community's ecotourism enterprise and its governance arrangements. The fourth part presents the community perceptions about the enterprise and an economic analysis from 2006 to 2013. The final section discusses the venture's benefits, lessons learned, and challenges.

Literature Review

Academic and policy literature argues that successful community-based ecotourism operations depend on the degree to which local governance factors—including ownership, tenure, participation, decision-making processes, and revenue sharing arrangements—ensure that communities have control over the activities taking place and access to the benefits (Butler & Hinch, 2007; Peredo, 2010; Zeppel, 2007a). This contrasts non-community-based ecotourism ventures, which are often controlled by outside operators with economic benefits accruing to private or government ventures.

Other arguments claim that community-based tourism may not provide a viable level of income and employment, due to the alleged paucity of revenues, the inequity of benefit distribution, and the perceived social costs to communities (Din, 1993; Hitchcock, King, & Parnwell, 1993).

However, benefits from community-based tourism, including for Indigenous communities, may also go beyond financial outcomes. Scheyvens (1999) argued that community tourism may promote a range of benefits associated with empowerment, including economic, psychological, social, and political empowerment, and community unity, as Indigenous tourism ventures are often designed to involve nature conservation, political discussions, business enterprise, and income for community development (Fennell, 2003; Mitchell & Eagles, 2001). When Indigenous peoples have control over ecotourism development in their own communities, including direct participation in the planning and implementation phases, the negative effects and impacts are often minimised (York, 2000).

Other scholars suggest that for many Indigenous peoples well-managed ecotourism is a way of achieving cultural, environmental, and economic sustainability for the community (Butler & Hinch, 2007; Epler Wood, 2008; Mitchell & Ashley, 2010; Goodwin, 2011). However, too often the synergies between ecotourism, local development, and nature conservation are not achieved because local communities were not fully involved in the design of projects. Yet, even when they have been involved, it has commonly been as cultural examples or exotic attractions rather than planners or managers (Honey, 1999; Stronza, 2005). It is also recognised that Indigenous peoples may increasingly be the owners, managers, entrepreneurs, and operators of ventures, generally supported by non-governmental organizations (NGOs) involved in conservation or community development (Zeppel, 2007b). In some places, Indigenous leaders are social entrepreneurs promoting initiatives that provide both collective and individual benefits (Peredo, 2011).

Indigenous entrepreneurs compete in a massive international tourism market and sometimes they are behind industry standards in terms of training or experience. Nevertheless, local entrepreneurs can combine innovation, resourcefulness, and opportunity to address social and environmental challenges affecting their communities. Social entrepreneurs focus on transforming systems and practices that are the causes of poverty, marginalization, and environmental deterioration, while social entrepreneurship is the recognition of a social problem and the use of entrepreneurial principles to organize, create, and manage a local venture to achieve a desired change within the communities where such initiatives are operating (Bornstein, 2004; Nicholls, 2006). According to Young (2006), the most distinctive aspect about social entrepreneurship is not the particular organizational forms that are used, but the entrepreneur's continual pursuit of a positive social or environmental impact as their work brings about a sustained shift in the social or economic relations of disadvantaged groups. Entrepreneurial initiatives are, therefore, directly linked to the people driving them, as the primary mission of the social entrepreneur or organization is to create social or environmental change; social entrepreneurship, at its most powerful, creates systems change to threats and inequalities, and provides sustainable pathways to scalable, replicable solutions (Skoll Centre for Social Entrepreneurship, 2014). Social entrepreneurship borrows from a mix of business and social movement models to configure solutions to community problems and deliver sustainable new social value (Nicholls, 2006).

Spear and Bidet (2003) defined five operational features for social enterprises: an activity launched by a group of citizens, decision-making power not based on capital ownership, a participatory nature involving those affected by the venture; an explicit aim to benefit the community, and limited profit distribution. In addition, the Institute for Social Entrepreneurs (2005) suggested that social entrepreneurship simultaneously pursues both a financial and a social return on investment. Social

entrepreneurship is also used for non-profit enterprises founded to support or create economic opportunities for poor and disadvantaged populations while maintaining a positive financial bottom line (Alter, 2000).

If social entrepreneurship works best when it creates new kinds of social value, then it is most likely to occur in areas that have been deserted by the traditional economy (Mulgan, 2006). Social entrepreneurs are often motivated to improve society or communities as agents of change by seizing opportunities others miss and improving systems, inventing new approaches, and creating sustainable solutions to change society or the communities where they are operating for the better (Skoll Foundation for Social Entrepreneurship, 2005). They attack intractable problems, take huge risks, and seek out formidable goals such as economic and environmental sustainability and social equity (Elkington & Hartigan, 2008). Creativity, innovation, and resourcefulness are the elements of entrepreneurship most relevant to social entrepreneurs (Nicholls & Cho, 2006). According to Alvord and colleagues (2004), social entrepreneurs are characterized by three types of innovation:

- a. Transformational—by building local capacities, this approach alters local roles and expectations through local community-based initiatives;
- b. Economic—by developing tools and resources to improve economic circumstances;
- c. Political—by building local movements to increase the influence of marginalized communities.

According to Bornstein (2004), the main operational areas in which social entrepreneurs create change have been poverty alleviation through empowerment, education, and training, including widening participation by the community, and the democratization of knowledge transfer, community regeneration, sustainable development, and environmental conservation, as well as advocacy and welfare projects. Epler Woods (2008) argued that ecotourism is a field ripe for collaboration with social entrepreneurs as they can play an economically sustainable role in both combating poverty and conserving the environment.

For almost two decades, ecotourism has sought to address environmental and social ills and, in recent years, community-based tourism and ecotourism specialists have sought to help local communities develop their own enterprises in buffer zones and protected areas, but have only sometimes generated economically sustainable results (Wood, 2008). Hence, the notion of financial sustainability is a key element to be considered in these types of initiatives.

A study on community-based enterprise in Latin America by Epler Wood and Jones (2008) found that many donor-supported community-based ecotourism projects actually removed cash from their businesses in order to meet social and environmental goals without regard for recovering those costs. This model demands a long-term solution. If local people successfully utilize social enterprise models to run their businesses, they should be able to cover their costs and have increasingly positive social and environmental impacts (Epler Wood & Jones, 2008).

Methods

This study was conducted from February 2005 to February 2015. Fieldwork included trips to the community of San Miguel, the San Miguel del Bala ecotourism lodge, and the town of Rurrenabaque located in the Beni department in the Bolivian lowlands. The qualitative and quantitative methods

utilized were informed by studies focusing on social entrepreneurship and common anthropological methods. The methodological framework was based on entrepreneurial approaches to social change aimed at finding solutions to poverty and environmental deterioration, as the impact of entrepreneurial activity seeks to transform unsatisfactory or unjust systems and practices and provide sustainable solutions (See Elkington & Hartigan, 2008; Nicholls, 2006; Skoll Centre for Social Entrepreneurship, 2014; Young, 2006). This article, therefore, does not consider social entrepreneurship as philanthropy or activism. Rather, it focuses on Indigenous entrepreneurs acting as drivers of change to address social, economic, and environmental issues in their communities through ecotourism as an alternative form of local sustainable development.

This investigation subscribed to the philosophy of scholars who emphasize diverse and dynamic methods when researching social entrepreneurship issues, including both quantitative and qualitative techniques (see Busenitz et al., 2003; Neergaard & Ulhøi, 2007; Perren & Ram 2004; Phan, 2004; Steyaert 2003). Saunders, Lewis, and Thornhill (2003) suggested that research strategies in this field include case studies, grounded theory, ethnography, and action research. In terms of qualitative research, focus groups, community surveys, and informal meetings were completed, along with participant observations and visits to the San Miguel del Bala lodge. Five focus groups were developed with Indigenous leaders of the enterprise and community, men and women of the community, enterprise workers and guides, and local ecotourism agencies working in the region. The focus groups discussed challenges, opportunities, benefits, impacts, needs, and expectations of San Miguel del Bala. Semi-structured interviews were conducted with community leaders and managers of the enterprise, local tourism operators, and authorities of Madidi National Park and the local Amazonian towns of Rurrenabaque and San Buenaventura, in the Beni and La Paz departments, respectively. The interviews were a detailed investigation of the origins of San Miguel del Bala, its governance structure, and specific attitudes towards the lodge held by stakeholders. Community surveys were free response, based on a guide of open-ended questions about specific topics, which gave respondents latitude to describe their responses using terms and language most familiar to each of them, and not bound to predetermined answers, which is particularly suitable when interviewing local leaders and community members (Mikkelsen, 1995). The number of people who completed the survey was 60 ($n = 60$). Compared to the investigative interviews, the surveys gauged general perceptions of community members about positive and negative aspects of the lodge, their expectations, and suggestions for possible improvements. A review of relevant historic and governmental documents ensured a thorough understanding of San Miguel's history and the Tacana Indigenous people. Quantitative analysis of economic indicators, including tourism flows and revenues, was completed to understand the evolution and performance of the community enterprise.

Background

The Indigenous community of San Miguel is located in the buffer zone of Madidi National Park and in the extreme south of the Tacana Indigenous territory situated in the north of the La Paz department of Bolivia (Figure 1). The community is only accessible by boat. It is located on the shores of the Beni River one hour from the nearby town of Rurrenabaque, which is the main tourist destination for this part of the Amazon. The average annual rainfall in the region is between 1,883 and 2,501 mm, with a minimum of 1,294 mm in the dry season and a maximum of 3,235 mm in the rainy season (CIPTA, 2002). The rainy season in the region extends from December to March, during which the Beni River increases its flow and frequently overflows.



Figure 1. Map of San Miguel del Bala and Madidi National Park.

According to the census conducted by the Indigenous Tacana Organization (also known as CIPTA) in 2000, the community of San Miguel had a population of 197 inhabitants in 33 households, of which 111 (56.3%) were men and 86 (43.7%) were women. The average size of the households was 5.97 members. Information obtained from the San Miguel del Bala enterprise in 2014 indicated that the community had 44 families and 235 inhabitants (San Miguel del Bala, 2014). The population of San Miguel has not suffered from a definitive emigration, although beginning in 1975 some families with more resources began to send their older children to Rurrenabaque for school. Before the creation of the community's ecotourism enterprise in 2003, the main economic activities for the

community related to agriculture, hunting and fishing, followed by the sale of manual labour (which encouraged patterns of seasonal migration) and, to a lesser degree, extraction of forest resources (Hissink & Hahn, 2000). A logging boom in the Amazon rainforest began around 1990 until the creation of Madidi National Park in the mid-1990s. Some men from the community of San Miguel worked for loggers as chainsaw operators or trackers. Within this period, the community faced conflicts primarily related to the use of natural resources by outsiders entering the community's historic land.

The Bolivian government's creation of Madidi National Park in 1996 imposed serious restrictions on San Miguel community members regarding access to their traditional areas for agriculture, hunting, fishing, and the gathering of fruits, palms, and other forest products (CIPTA-DRP, 2000). These restrictions resulted in the community members feeling excluded from Madidi National Park, as well as experiencing a reduction of income and economic alternatives due to diminished access to renewable natural resources. This sentiment was illustrated by a current leader of San Miguel, who stated, "Madidi National Park did not control those who entered to hunt under the guise of tourism agencies, but they prohibited us from using the forest resources."

Shortly after the park's creation, tourism in the region grew through private tourism agencies, most of which were based in Rurrenabaque. Many tourists passed through the community of San Miguel and its historic Tacana territory. Facing a decline in traditionally available economic opportunities, community members searched for work in Rurrenabaque, including at private tourism agencies. Oftentimes, community members working as guides or porters were not fairly compensated. Additionally, some tourism agencies would enter the community without agreements or advanced notice and without leaving any economic benefit. A few private agencies intended to settle in San Miguel where they worked with guides from the community, but upon being asked to give a percentage of their revenue to the community, they did not return.

As an alternative to private tourism agencies taking advantage of their territory, in the late 1990s San Miguel began to consider developing an ecotourism project to involve the community more comprehensively. Additional problems were identified; for example, non-governmental organizations (NGOs) working in tourism in the region were considered to be taking advantage of Tacana communities. In September of 2001, a conflict between the region's Indigenous communities and the NGO Eco Bolivia triggered the blockade of the Beni River by the Indigenous communities. The communities asked for the expulsion of Eco Bolivia from the region due to allegations about irregularities in complying with the requirements of tourism operators. This caused Bolivia's National Service of Protected Areas (SERNAP) to inspect the region, where they discovered Eco Bolivia's construction of tourist cabins without authorization. These illegal settlements resulted in the expulsion of Eco Bolivia (Medrano, 2001).

These conflicts, the increasing flow of tourism to Madidi National Park, and the creation of a new community-based ecotourism project in the region called Chalalán, led San Miguel to formally endorse the idea of creating their own ecotourism project. The goal was to provide economic opportunities for the community. The ability to have a lodge and community business was still far from reality for San Miguel, but nevertheless the community leaders could visualize the beginnings of change.

Case Study Results

The Origins

In the early 2000s, San Miguel began to negotiate support from Cooperative for Assistance and Relief Everywhere [CARE], an international development NGO, for water infrastructure and sanitation projects. At the time, houses in the community were scattered and coordination between families was scarce. San Miguel knew that successful acquisition of external support was only feasible if the community was organized. This meant improving the community's physical organization and coordination of labours, as well as its confidence in managing projects.

The community was able to work together successfully on the CARE water system project, effectively involving its inhabitants and organizing the contribution of labour and local materials. Through this success, the leaders of San Miguel recognized that their collective efforts could create the opportunity for an ecotourism initiative. They were motivated by the community members' interest in improving living conditions and their increasing familiarity with ecotourism, especially after witnessing the success of the nearby Chalalán ecotourism lodge. Community members and leaders believed that revenue generation from ecotourism could not only help the families working for the lodge, but also the entire community. It was proposed that a percentage of the income generated by such a venture would support the community's school, which had various shortcomings and received little support from the local and national governments.

Recognizing the possibility of financial and technical support from development and environmental organizations enabled San Miguel to consolidate the community's ideas and energy emerging from the water project. The United Nations Development Programme (UNDP) was interested in supporting ecotourism initiatives in the Madidi region at this time. In 2002, San Miguel proposed a community-based tourism project to the UNDP, and the San Miguel del Bala ecotourism lodge was created. Planning and the initial development of infrastructure were completed from March of 2002 to August of 2003.

In 2002, Conservation International Bolivia (CI Bolivia) was concluding its project, "Sustainable Development and Ecotourism," which supported the construction of Chalalán in Madidi National Park. After this experience, CI Bolivia agreed to work with San Miguel when the community presented a proposal for technical support for constructing the lodge while the community provided manual labour.

With construction underway, San Miguel then sought training in management and finance. A second proposal to CI Bolivia was approved for the period of 2003 to 2005 with the goals of strengthening business administration skills, training personnel, and purchasing initial equipment. Throughout the planning and construction of the lodge, the community directly managed resources from UNDP and CI Bolivia. This gave the community first-hand experience with financial management that would have positive repercussions when managing the business.

The community continued to contribute manual labour and local materials, but uncertainty concerning the project remained. A community member who had participated from the start of construction reflected:

Many people lacked trust or were not sure what the results would be . . . The community members were asking if it was worth it to work on the project, abandoning their farmland

without receiving compensation [given their commitment to an in-kind contribution of labour].

However, there was still optimism regarding the possible opportunities from owning an ecotourism enterprise. Forty families from the community committed as legal co-owners, or associates, of the project. A small number of community members did not become associates because they preferred to simply observe in order to see if the enterprise would accomplish its goals.

San Miguel also formally requested the extension of the boundaries of the park to the community. However, the community received no official response from the park addressing this request. Nevertheless, the community developed its own guidelines to reduce hunting and control the entrance of outsiders to their traditional territory inside the park. San Miguel's strategies helped to conserve the biodiversity in the area. As a result, the community of San Miguel was named as "Honorary Rangers of Madidi National Park" by SERNAP on September 16, 2005, due to its outstanding continuous support of conservation in this area.

By the end of 2005, construction was completed on seven cabins for 21 guests, a common cabin for 10 guests, the lodge's potable water system, a kitchen and dining room, as well as a common house for group events and an exhibit on Tacana culture.

At this point, the first strategies in marketing, promotion, and sales were developed, including the inauguration of the San Miguel del Bala office in Rurrenabaque. A lack of experience in marketing and sales initially impeded the creation of clear strategies. From 2006 to 2007, UNDP provided support to overcome these shortcomings after witnessing the community's successful project management in the previous stages of developing the lodge. Additional support from international volunteers was also important as they assisted with marketing activities, promoting craft sales, generating reports on community member participation in the business, and strengthening the competencies of community leaders.

The Beginning of Operations and the Evolution of the Business

Operations at San Miguel del Bala began in late 2005 with the arrival of the first tourist groups. Workshops and seminars led by organizations working in the region were held at the lodge, given its excellent infrastructure and accessibility. The first year saw positive results, which allowed the enterprise to provide financial support to address community housing issues. One of the community co-owners affirmed that, "Everyone was receiving support directly or indirectly, which allowed the local enterprise to be valued and accepted by the community members." These positive results increased the feelings of pride and ownership in the community for the lodge. The manual labour and contributions from the community during the initial development of the lodge served as the foundation upon which this sense of ownership was built. With the lodge's name synonymous with that of the community, this ownership motivated the nascent venture to continue striving for success.

In 2007, the website of San Miguel del Bala was created and in 2008 and 2009 additional support from the University of North Carolina and Deutscher Entwicklungsdienst (German Development Service) provided over 80 percent of the funding for the lodge's first solar panel installation. The business continued to attract tourists, which allowed it to keep supporting housing and educational improvements in the community. As a result of this work, San Miguel del Bala received increasing international recognition, including visits from prestigious international media, such as the BBC and other European networks, and participation in international tourism fairs. According to the

testimony of the business's first manager, Constantino Nay, "We have achieved what we never could have dreamed. It was our own community-run business and it was functioning."

With the increasingly positive results of the business, financial support for housing, education, equipment, tools, and health grew. The transportation of community members, particularly in cases of medical emergencies, has been recognized as an especially significant support that the business provides to the community. Additionally, the business reinvests part of its profits into improving its own infrastructure and equipment. Funded entirely by the lodge, from 2009 to 2010, San Miguel del Bala built a platform for macaw observation and four tourist cabins on its legally recognized Tacana territory in Madidi National Park. These cabins, also powered by solar panels, increased the tourism offerings available to clients. This was especially shrewd considering the majority of the company's purchased tourism packages included overnight stays in Madidi. Before constructing these cabins, only tourists interested and able to stay in camping tents could spend the night in Madidi National Park, which limited the number of clients. The manager of Chalalán reflected on this accomplishment:

The manager's leadership has helped sustain the venture over time . . . We have not only seen him maintain their infrastructure . . . but also they have constructed more infrastructure than the original project . . . I do not know another community-owned business in Bolivia that has been able to build new infrastructure with its own resources.

The success of San Miguel del Bala has been encapsulated in the numerous prizes it has won. In 2011, the enterprise won the "TO DO! Socially Responsible Tourism Award," an international honour given out after a rigorous organizational, economic, social, and environmental evaluation. San Miguel has become one of the most recognized community-based ecotourism enterprises in Bolivia and received an award from the Bolivian President, Evo Morales, in 2014 for its contributions to local development.

Governance Arrangements

Understanding San Miguel del Bala's governance arrangements provides a glimpse of the details behind the lodge's evolution. The lodge is completely owned by participating community members of San Miguel and the community is located on territory that was legally recognized as *Tierra Comunitaria de Origen* (Community Territory of Indigenous Origin, a national government designation for Indigenous territories) in 2003 and 2004. As part of the Tacana Indigenous ethnicity, San Miguel is represented by the Indigenous Tacana Organization, or CIPTA. At quarterly meetings, called *asambleas*, decisions are made with the input of all owners regarding the long-term planning, lodge operations, as well as the investment and distribution of community benefits.

The quarterly meetings are overseen by the lodge directory, a committee of associates that hosts meetings every three months for all lodge associates. This directory consists of a president, vice president, secretary, and vocal chair. The role of the directory is to facilitate discussion on the state of tourism operations, address concerns of associates, promote discussion and planning of future lodge activities, oversee leadership transitions, and engage with external institutions, such as Madidi National Park. The lodge manager provides updates on tourism operations at meetings, while the accountant presents an economic report.

The San Migueleños comprising the directory are meeting facilitators and participants. Decisions are made through group discussion among associates, in accordance with the lodge's governing statutes.

Final decisions are occasionally made through blind voting, including when requested by associates and for significant decisions, such as elections of directory leaders or the lodge manager. Every lodge associate must be accounted for at the meetings. Unaccounted absences result in financial or work penalties, which encourage full participation of lodge associates.

San Miguel has arranged a benefits distribution between the associates depending on the economic results of the enterprise every year. In the financial balance at the end of the fiscal year, the manager and accountant inform the associates and the community about the economic performance and results in an assembly held in the community. As there are some community members and families that are not formally associates of the enterprise by their own decision, these families do not participate directly in the distribution. However, each year San Miguel del Bala has financially supported health, education, and transportation initiatives for all community members. This decision has reduced concerns of non-associates in the community, and such support is deemed appropriate by the community. A detailed analysis of these issues is presented throughout the following sections. Additionally, non-associates have the opportunity to sell agricultural products to the enterprise, which provides another opportunity for financial support.

Community Perceptions

The surveys conducted during different periods of the lodge's development (2005 and 2009) and operations uncovered a variety of perceptions among community members, including San Miguel del Bala's community associates and non-associates, regarding their venture. These sentiments reflected the social, cultural, economic, and environmental impact of the project, and included the lodge's positive and negative effects, ideas for possible improvements and expectations for the future.

Positive benefits. The benefits to the community, beyond the individual employees, were a key topic from surveys conducted in the community. The results obtained reveal a wide range of perceived benefits, including both monetary and non-monetary benefits. Although most analyses of ecotourism highlight monetary and tangible benefits, such as income generation and employment, in this case, skills training was the most important benefit perceived by individual community members.

Non-monetary community benefits were recognized by 27 percent of the responses, and included the value of local leadership, cultural revitalisation, as well as participation and joint communal and family efforts in the project (see Figure 2). Other non-monetary benefits included habitat conservation and increased pride from witnessing the success of the ecotourism lodge. These benefits, when coupled with the community benefits and training, represented more than half of the total benefits perceived, and illustrate that the community member's perceived benefits spanned beyond strictly monetary outcomes.

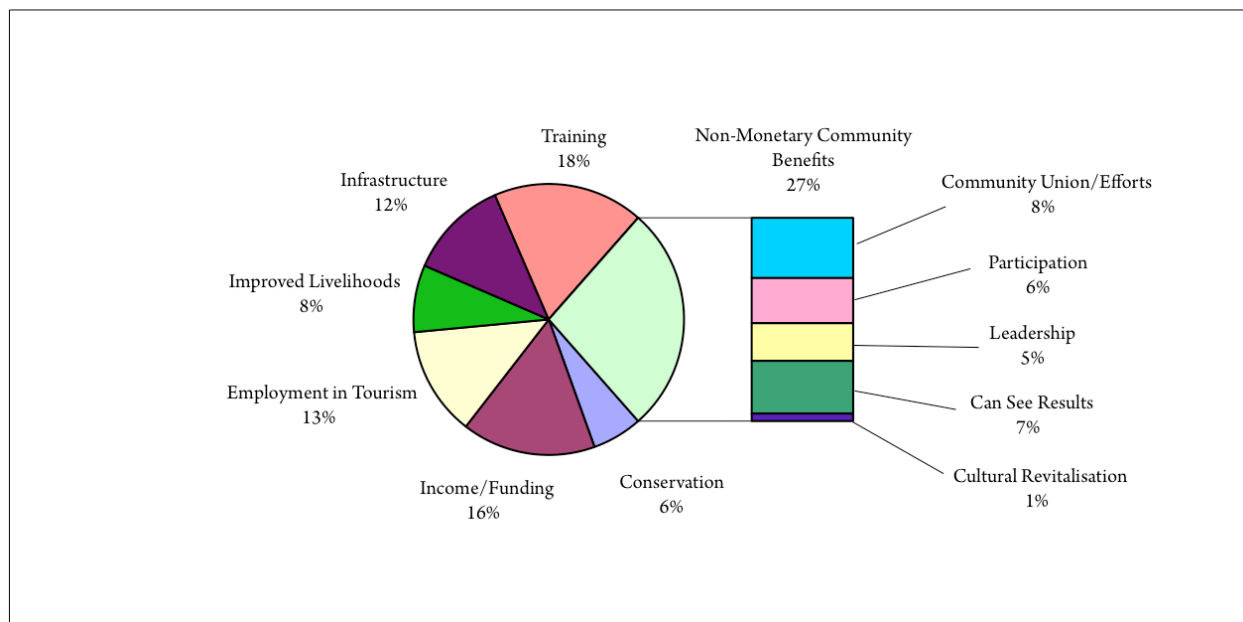


Figure 2. Perceptions of positive benefits from Indigenous tourism in San Miguel (Multiple answers, n = 60).

The following statement from a female community member interviewed exemplifies these perceptions: “Before, nobody cared about our community. Now we are known. Lots of people come to visit us, which also brings income. Before, we were forgotten; nobody knew about us.” The perceived benefits relating to biodiversity conservation, including reduced or eliminated hunting pressures and deforestation practices in the community, were seen as important to ecotourism. According to the testimony from an interview of one man in the community, “If people hunt wild animals, they will be gone. If this situation continues, no more wildlife will remain in the forest, which will affect our tourism operations.”

Negative perceptions. When asked about negative impacts of the project, a number of community members agreed that technical assistance and training were not managed properly (see Figure 3). Twenty-seven percent of survey respondents stated that the technical assistance provided was poor. This perception was related to problems in the infrastructure design for the lodge and facilities developed by external consultants. These responses also reflected delays in training provided to community members. Sixteen percent of community residents felt that there was the need for additional training in order to avoid delays.

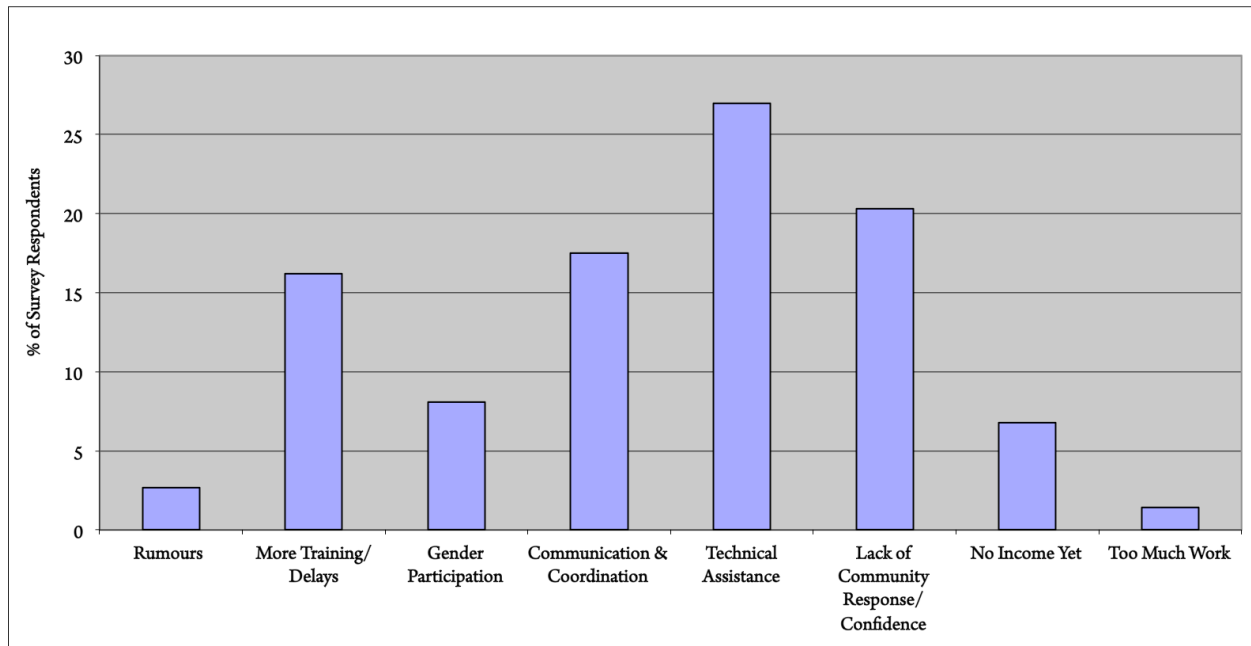


Figure 3. Perceptions of negative aspects of Indigenous tourism in San Miguel ($n = 60$).

In terms of community involvement and participation, 20 percent of community residents surveyed felt that there was still a lack of commitment to and confidence in the community-based enterprise. Other perceptions related to poor coordination and communication included community members' lack of compliance with responsibilities and delayed fulfilment of tasks due to misunderstandings. Seventeen percent of respondents viewed this as a problem. In addition, the involvement of women in the venture was perceived as low. The following statement from a young woman in the community illustrated these perceptions:

We need more [balanced] gender participation and better coordination as training sessions are not adjusted to women's daily activities. Women cannot participate at the same level and time as men because we have to take care of the children.

Community perceptions of possible improvements. The survey revealed that the venture's areas needing improvement were largely focused on organisational factors, and were mentioned by almost two-thirds of those surveyed (see Figure 4). These included the commitment to the enterprise from community members, communications, balanced gender involvement, and training. Community members also noted the need to improve infrastructure and income generation and distribution as the enterprise generates more profits over time. Improvements in environmental conservation, such as less forest clearing and increases in wildlife populations, were also suggested, which may illustrate the strengthened relationship of San Miguel with Madidi National Park.

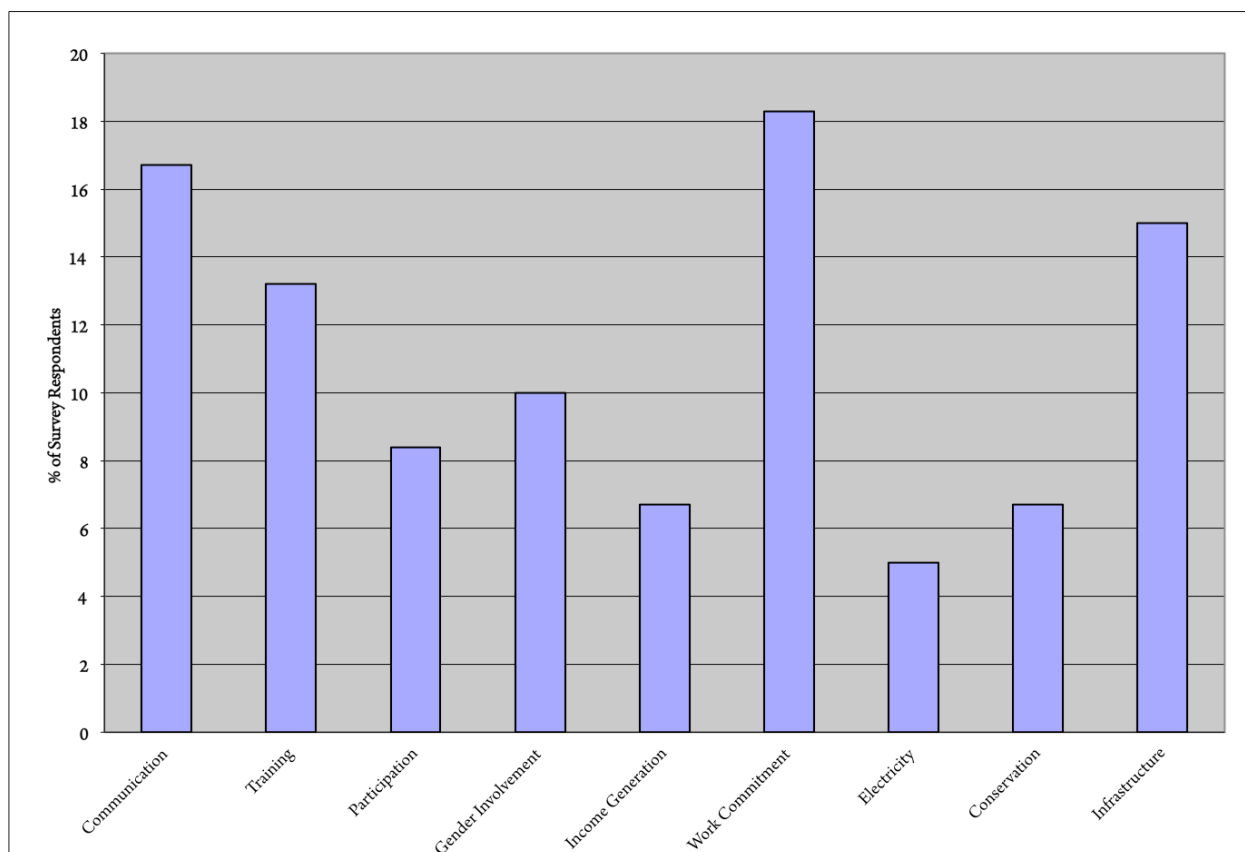


Figure 4. Local factors and areas to be improved in San Miguel ($n = 60$).

Expectations for the future. Approximately one-third of survey participants stated that building and developing a sustainable enterprise are the main hopes for the future (Figure 5). Approximately, 13 percent of respondents expected that younger members of the community would be trained and take over the management of the enterprise in the future. This is illustrated by the head of a family who said, “In five years we must manage our enterprise without any help from outsiders. We must have professionals from our own community and a solid enterprise.” Another co-owner of the lodge stated in an interview:

One little boy, who is about 6 years old, has been participating in the training sessions because his parents had no one to leave him with. He has been listening and learning. In 30 years, he will have better preparation and education, and we hope he will be able to manage the enterprise better than us.

The hope that health and education services will be provided by ecotourism revenues was common in survey responses. A mother involved in the venture expressed that:

The project improves our income, which will be for our children’s education. We have to give books and other educational materials for the children about ecotourism; they will be more prepared and not be like me. This is the future for our children.

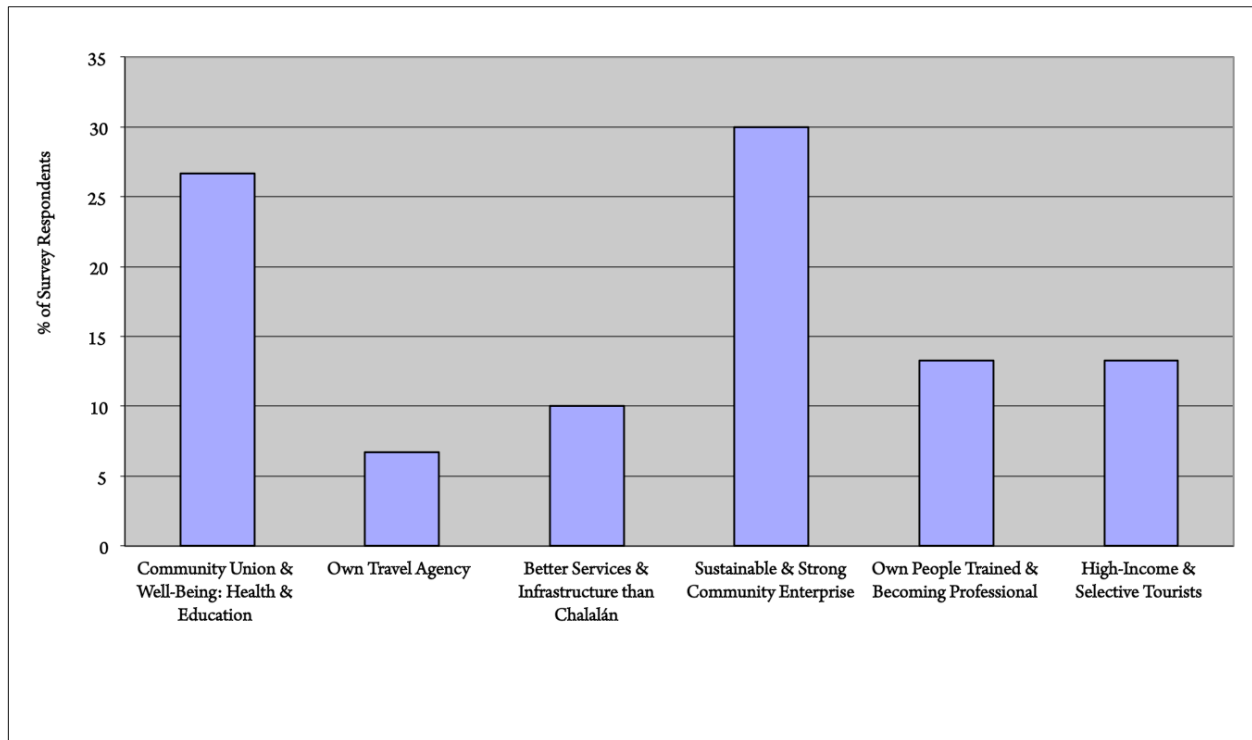


Figure 5. Expectations for Indigenous tourism in San Miguel (n = 60).

Community unity was another future expectation as ecotourism has filled people with a sense of value and recognition. An older man in the community said, “We want the enterprise to be the future of the community.” In addition, 13 percent of community residents expected that tourists with high incomes and high levels of education would visit the community regularly. In terms of self-sustainability, several respondents suggested creating a local travel agency that would complete the community-owned tourism supply chain.

Economic Results

Operational data obtained from San Miguel del Bala indicates that, after the first full year of business operations in 2006, revenue and the number of tourists increased for five years (Figure 6). From 2006 to 2011, San Miguel had a 4-fold growth in revenues and a 5-fold increase in tourist arrivals. Tourism peaked in 2011 when San Miguel received almost 600 tourists. However, a reduction in both tourists and revenues occurred in 2012 and 2013.

The enterprise was able to increase the wages of guides, cooks, and motorists by over 150 percent from 2008 to 2014. Regardless, daily wages still lagged compared to private agencies. In some cases, San Miguel has had to contract guides and cooks from outside of the community, which caused frustration for the managers because the enterprise did not always have enough employees readily available for work.

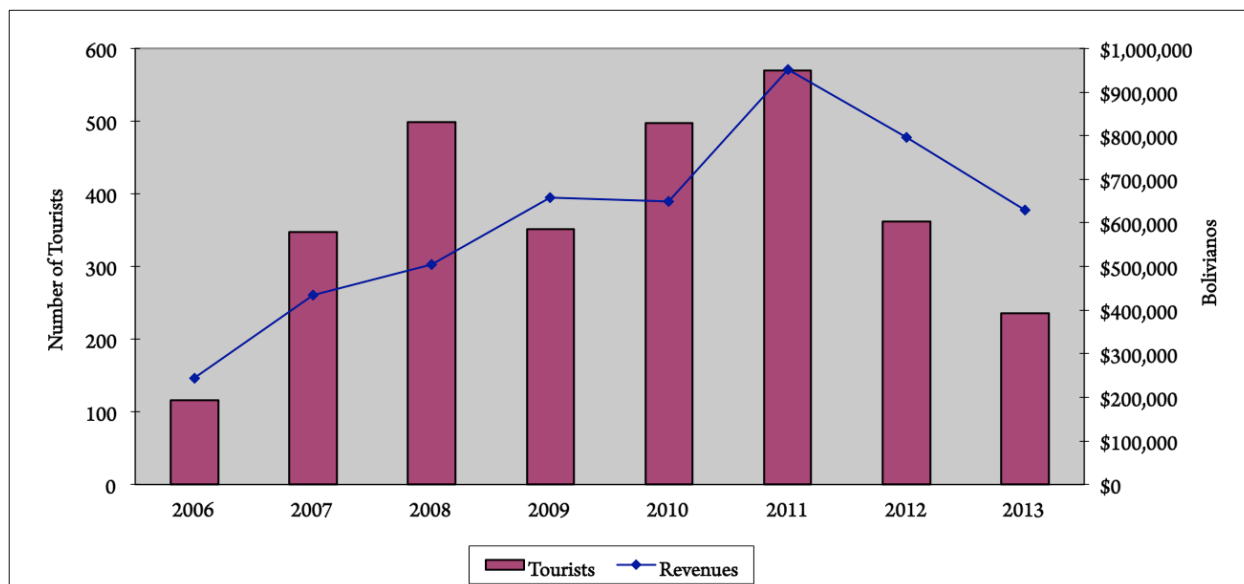


Figure 6. Revenues and number of tourists visiting San Miguel del Bala by year.

During the period of 2006 to 2013, almost 50% of visitors to San Miguel came from European countries, the greatest market segment for the community-based enterprise. The second greatest segment was the Bolivian market, which had a noticeable reduction in recent years, followed by North American countries, and then visitors from Australia and New Zealand (Figure 7, Figure 8).

During the study period, 75 percent of tourism packages were sold at the office of San Miguel del Bala in Rurrenabaque. Travel agencies in other locations were responsible for 20 percent of the sales and the Internet brought in a minor 5 percent. Israeli tourists, who represent a high percentage of backpacker tourism in this region, represented only 1 percent of visitors to San Miguel del Bala. San Miguel has had higher prices than most local ecotourism operators, and therefore attracted tourists with greater capacity to afford the extra expenses for an environmentally responsible resort. San Miguel has tried to avoid backpacker tourism, which has occasionally produced negative environmental impacts in Madidi; for example, some private agencies have offered hunting tours, which are illegal. More than 70 percent of visitors to San Miguel were professionals, followed by students representing almost 25 percent, and retirees making up the remaining 5 percent.

State of Transition

In January 2015 at the quarterly lodge meeting, San Miguel del Bala's first manager resigned after nine years. Another one of the original founding associates was elected as the lodge's second manager. With this transition comes the opportunity to analyze perceptions on the change of management. The community members appreciated the former manager's achievements in shepherding the lodge from new venture to mature business. Among the tourism competitors, the management of San Miguel del Bala was historically seen as stable and effective. Regardless of whether associates voted for the newly elected manager, they vowed to give their new leader a fair opportunity as manager and declared they would support him. This support could help to propel San Miguel del Bala forward during an uncertain transition period.

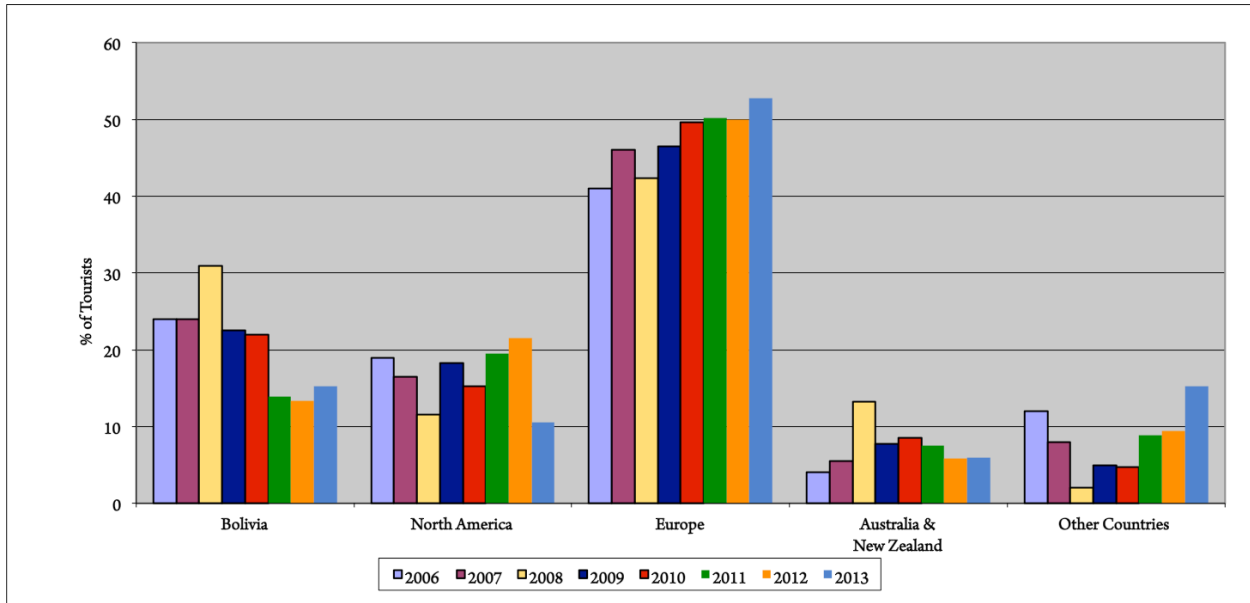


Figure 7. Tourism market segments by region in San Miguel del Bala (2006-2013).

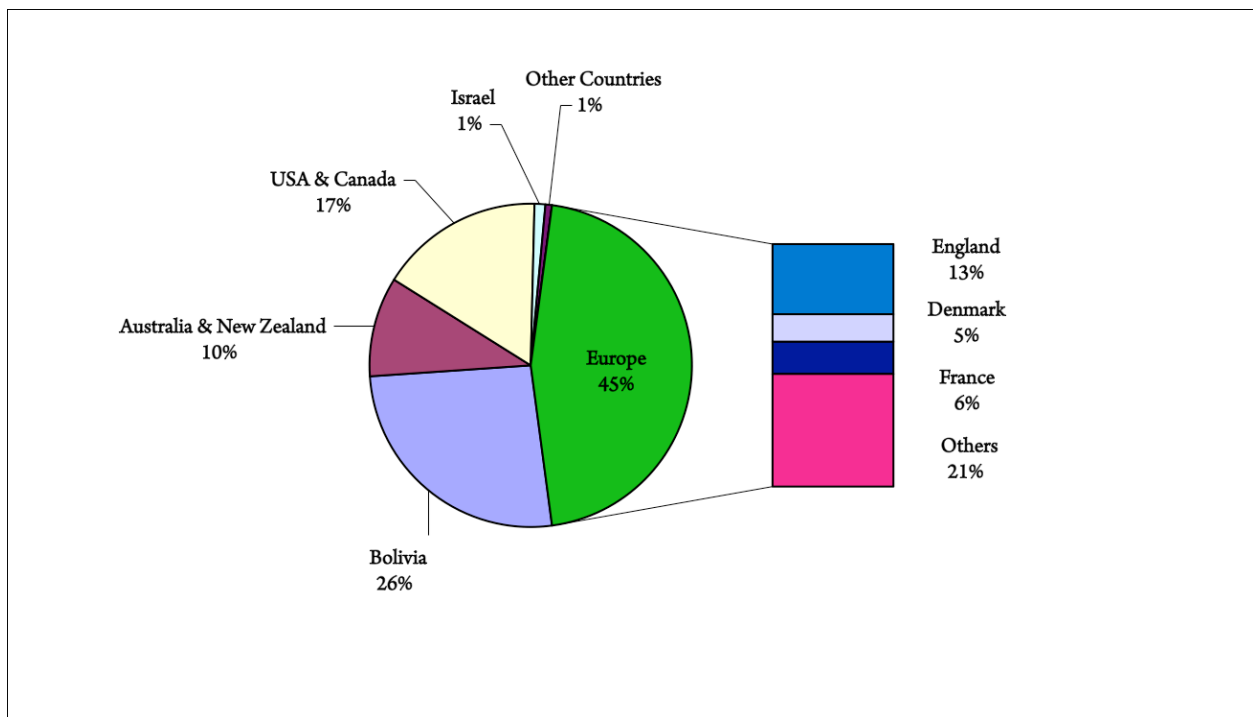


Figure 8. Visitors by country and region (2006-2013).

Concerning the qualities associates desired for their new leader, at the time of the election, the co-owners most often stressed the need for a leader with business acumen. People both inside and outside of San Miguel del Bala acknowledged that it was not advisable to have someone enter a management role with a steep learning curve, as businesses usually look for a new executive with greater or innovative abilities compared to the exiting leader. Community members had mixed feelings about whether there would be an increase or decrease in tourist visits after the change in leadership, but generally maintained a “wait and see” approach. The tourism competitors in Rurrenabaque expected that San Miguel would experience at least a small decline in visitors, but also acknowledged that this is part of a normal business cycle in which companies experience periods of growth and decline. Continuing to study San Miguel del Bala and regional tourism will provide a better idea of the long-term results of the leadership transition.

Discussion

Benefits and Lessons Learned

San Miguel del Bala has been built with the participation of the community throughout the entire process, and evaluation of the venture tends to support academic and policy literature’s standards for successful social entrepreneurship.

The benefits provided by the lodge and its leadership practices offer key lessons that have guided San Miguel’s growth. The success of the lodge has created and strengthened self-esteem, ownership, organization, and technical competencies within the community because the associates have guided the decision-making and development of the business. For example, the signing of agreements by the community with external organizations promoted shared ownership and responsibility among the venture’s leaders, co-owners, and the community. This aligns with existing literature’s assertion that successful community-based ecotourism ventures exhibit high levels of community governance (Butler and Hinch, 2007; Peredo, 2010; Zeppel, 2007a). The participation of San Miguel’s community

co-owners in all facets of the lodge’s development helped ensure a diverse array of benefits from the business for its associates and the community, which Spear and Bidet (2003) suggested as the operational features for social enterprises. The perceptions of community members illustrate tangible and monetary benefits (including employment and revenue generation), intangible benefits (including recognition, unity of the community, and leadership) and other social benefits. Together these represent the project’s comprehensive nature beyond ecotourism. A principal lesson from San Miguel’s success is that the in-depth involvement from stakeholders of such a venture can strengthen the self-esteem of the people, as well as the organization, and increase the capacities of the community.

Since it first began operations, the relationship between the enterprise and the community has grown. A key reason for this has been the support that the community-based enterprise provides to the community, at both the collective and individual levels, for education, health, housing, transport, and infrastructure. San Miguel del Bala has supported diverse needs within the community that were not previously addressed by the local and national governments. This has increased the value of the enterprise for the community, and the enterprise’s effectiveness in this role depends largely on the performance of the business. Also, the social capital, leadership, and image of the community have improved significantly since the lodge’s creation, supporting the Nicholls’ (2006) argument that social entrepreneurship delivers new social value. San Miguel has learned that providing the right incentives, such as offering development assistance to the community in terms of health, housing, or

education, can help motivate the co-owners to participate in making the business a success, thus creating a virtuous circle. Government incentives for community businesses that promote such social reinvestment to improve community living conditions would help support Indigenous ventures.

Every business venture needs a motor, and the community of San Miguel has had the leaders and savvy to undertake new initiatives and turn entrepreneurial ideas into reality. For many, San Miguel's original motor was its first manager, Constantino Nay. He played a significant role in helping the community fulfill its "dream," and cultivated a generation of positive change in the community. New leaders require time to emerge and San Miguel has found itself in an uncertain transition period. The former manager reflected on this predicament, "I see training the next leaders as a very big weakness. I wanted to train others to follow me, but I have not had this luck." San Miguel del Bala has learned that it is essential to provide support and opportunities for training the youth, so that they can manage the enterprise with confidence in the future. With proper training, the next generation of leadership can successfully sustain the business.

Managing a community-owned business requires attentive and forward-thinking leadership. Each decision by the manager involves business, community and family, and therefore requires thoughtful consideration. Having a leader who can balance these matters is critical to the success of a community-owned enterprise. As illustrated by the leadership transition in San Miguel, the manager requires the support of the community co-owners who constantly evaluate the manager on both personal and business matters. Community-owned tourism also requires visionary leadership to successfully grow the company while accounting for both short and long-term economic prospects. San Miguel has exercised this vision while offering employment opportunities, building infrastructure, teaching professional skills, and growing institutional relationships. For example, although construction of the lodge was completed in 2005, San Miguel continued to invest in its infrastructure. In 2008 and 2009, solar panels were installed for all 10 original cabins, reducing the lodge's dependence on a gas-powered electrical generator and improving its environmental impact and marketability. As San Miguel moves into its next chapter under new leadership, the first 10 years of operations offer valuable insights on the importance of thoughtful and forward-thinking leadership.

The enterprise has also utilized institutional relationships and networks as part of its efforts to expand its services. Relationships with external organizations have helped develop in-house business skills, such as speaking English. As of 2015, two of the business's guides were fluent in English and an office administrator was professionally proficient, helping the company to increase its market share of English-speaking tourists. In addition to fostering relationships to directly benefit the lodge, San Miguel's relationships with other agencies have provided it with insights on cautionary tales. The recent difficulties of some indigenous community-owned tourism agencies based in Rurrenabaque, such as the closure of the Mapajo Eco-lodge, arose from inadequate and insufficient marketing and unsound management. San Miguel's leaders acknowledged that such examples taught them the importance of a smooth leadership transition and clear enterprise-community relations for the sustainability of its own business. Through such experiences, San Miguel's leaders have learned the value of positive relationships with institutions and other companies in order to grow its own business and learn from the missteps of others.

Entrepreneurs at San Miguel seized the opportunity and available resources to build their own enterprise, taking risks to solve the problem of diminishing sustainable economic opportunities. By striving to achieve economic and environmental sustainability and social equity, they created an

economic alternative for the community while operating within the enterprise's financial bottom line. San Miguel leaders explicitly aimed for and achieved the goal of benefiting the community while operating with reference to a financial bottom line, demonstrating the importance of social entrepreneurship as described by Alter (2000), Nicholls (2006), Young (2006), and Elkington and Hartigan (2008), among other scholars.

Throughout the last 10 years, San Miguel's entrepreneurs have continuously pursued positive social and environmental impacts, and their work and innovation has brought a sustained shift in the social and environmental conditions. They are transforming the economic circumstances of the community and increasing the voice of the community, which is now recognized as one of the best examples of community-based tourism in Bolivia. These are the innovation elements that Alvord and colleagues (2004) suggested characterize social entrepreneurs.

Despite a regional decline in tourism in recent years, which has affected most of the operators in Rurrenabaque, San Miguel has achieved positive results and has been recognized as one of the most promising initiatives in this sector today. In addition to the lessons learned by San Miguel's leaders described above, the venture's success has been bolstered by the following five factors:

- a. Professional service, a high-quality tourism product, and suitable infrastructure.
- b. San Miguel's efforts were assisted by a favorable and timely investment from different organizations that supported development initiatives, such as UNDP and CARE, and environmental causes, such as CI Bolivia.
- c. Efficient and transparent management of operations that was founded on effective training. This ensured that the interests of all stakeholders were accounted for in a coordinated process.
- d. The previous existence of the Chalalán Indigenous ecotourism venture in the region permitted access to experience and knowledge associated with tested community-owned tourism models. This was helpful for avoiding pitfalls and keeping costs down during the lodge's development.
- e. The lodge's location is conveniently close to Rurrenabaque, the regional tourist hub, and to the entrance of Madidi National Park, the highest profile tourism destination of the Bolivian Amazon. This gives San Miguel a distinct advantage compared to other ecotourism lodges in the region, especially those that are not based out of a community. This prime location also makes Rurrenabaque a more attractive tourist hub, as high quality expeditions are easily accessible. This is necessary to capture more segments of the international tourism market that are concerned about ecological responsibility.

Challenges

San Miguel has faced both internal and external challenges while working to consolidate its current market position and build on its achievements. One of the greatest challenges has been generating capacities in young people to ensure effective business management in the short and medium term. The requirement of general training in business administration has been coupled with the need to be able to count on employees who speak English in order to communicate with this segment of tourists. Additionally, continuous training in key areas, including financial accounting, could help San Miguel maintain and enhance its market position. Given the management problems recently faced by other community-owned lodges in the region, San Miguel co-owners expressed particular concern over financial sustainability and transparency. The need to train more youth to lead the enterprise in the future must be recognized by all community-based ventures eventually and requires constant work. However, the expectations and concerns of the community regarding the long-term sustainability of the lodge can provide the impetus to ensure that new generations are capable of managing the enterprise. Translating this vision into concrete actions has been a barrier to overcoming this challenge.

In the meantime, San Miguel del Bala's greatest test throughout 2015 and 2016 is ensuring a successful leadership transition. A change in leadership results in a loss of institutional knowledge. Concerns that San Miguel would experience a decline in business were present in both the community and tourism industry of Rurrenabaque. Time is required for the new leadership to become fully acquainted with tourism operators and agencies, and develop new relationships with other businesses. During this period, San Miguel should take care to maintain its quality of service and strive to improve standards. It is in San Miguel's interests to ensure a smooth leadership transition and avoid the missteps that have affected similar businesses. While this is no easy feat on its own, the enterprise and the community will also have to navigate the ongoing uncertainty surrounding proposed regional infrastructure projects, including the construction of roads and a hydroelectric dam.

The recent history of San Miguel highlights the challenge of developing and maintaining robust leadership transition methods and governance structures. Given the concerns of lodge associates regarding the change in leadership, developing concrete transition steps in addition to an election would help facilitate a smooth change of managers. These could include management training or a manager-shadowing period for the newly elected leader. Additionally, defining maximum term lengths for management positions may help reduce dependence on a single person by facilitating the participation of more co-owners in leadership positions. A higher frequency of regular leadership changes could also help to spur the development of more concrete leadership transition steps. Another important aspect of lodge governance for San Miguel to address is long-term membership policies. For example, San Miguel must strengthen policies regarding the transfer of associate memberships within families, particularly as young San Migueleños become adults and older San Migueleños retire from tourism. Developing clear standards as to who is allowed to become a lodge co-owner is vital to understanding who can participate in lodge decision making. An evaluation of San Miguel's existing governance structures based on existing academic and policy literature's principles for successful community-based ecotourism (Butler & Hinch, 2007; Peredo, 2010; Zeppel, 2007a) suggested that the community is well positioned to make appropriate changes regarding ownership and tenure as needed.

Another challenge, not only for San Miguel but for all community-based enterprises, has been to maximize the enterprise's collective benefits for the community. Maintaining a strong relationship

between the business and the community has been one of the central sustainability factors for the enterprise, and would be especially important during periods of stagnation or decline. The continuous provision of social and collective benefits ultimately depends on the financial sustainability and economic performance of the Indigenous venture. There have been high expectations among the community members regarding the relationship between the business and community. If these are not met, internal conflicts could hurt the enterprise.

Questions about maintaining and adapting culture are always associated with development initiatives and, in this case, the community expressed some fears about the loss of cultural elements. Before the launch of the project, San Miguel experienced the loss of traditional dances among the youth, which the community has been trying to recuperate. While some scholars suggest that well managed ecotourism can achieve cultural sustainability (Butler & Hinch, 2007; Goodwin, 2011; Mitchell & Ashley, 2010), there was a perception among community members that it will be difficult to avoid all cultural impacts, particularly on youth. Many of them may lose their customs in order to have another lifestyle, which could be obtained through better income. Supporting cultural recovery and revaluation will continue to be important in the community.

Another fundamental challenge for San Miguel, in the short and long run, is the strengthening of promotion and marketing. Having personnel in the office focused on marketing could grow the customer base. Although there is backpacker tourism in the region, given the quality of service at San Miguel and its accessibility, price structure, as well as natural and cultural focus, the enterprise could capture wealthier segments within the responsible tourism market. Additionally, there has been limited local and national marketing for Amazonian tourism from the enterprises and local governments. At the national level in 2012, Bolivia launched a major tourism marketing campaign to attract tourists to the country, but Madidi National Park was not a focus of the campaign. No community-based tourism venture can function alone and there must be marketing support, both internally and externally.

Additional external factors have also presented San Miguel with significant challenges. Countries have continued to recover from the 2008 financial crisis and resulting recession, which could affect levels of international travel. If fewer tourists arrive in Rurrenabaque, then there are fewer potential clients for San Miguel. Additionally, the historically unpredictable regional weather has continued to present obstacles for all tourism agencies in Rurrenabaque. Heavy rains in the region still bring all business to a halt at times. This has caused delayed planes and buses, and knocked out Internet and phone services, all of which affect business operations. The local perception was that flooding of the Beni River has become more common in recent years, with major floods in 2011 and 2014. Both of these floods caused significant destruction. In the 2014 flooding, three tourist cabins were damaged in San Miguel, and regional tourism activity was halted for two months.

San Miguel has successfully demonstrated that it is possible to achieve results under these circumstances. It is a demonstrative model of what can be done not only in community-based tourism, but also in improving the living conditions of a community through its full participation. This has provided valuable lessons learned for the future. The articulation of short-, medium-, and long-term results is important in the development of community-based ventures, as the consolidation of an enterprise can require 10 years or more. The results regarding income generation, strengthened competencies, and the involvement of community members can be glimpsed in shorter periods of time. Recognizing these short-term accomplishments can help motivate and consolidate community enterprises. This has been initially achieved in the case of San Miguel, which

is one of the main lessons learned from this initiative and generates a basis for continuing operations in the medium term.

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