

TO DO! 2016

Contest Socially Responsible Tourism



Award Winner

PUEBLOS MANCOMUNADOS

Represented by:

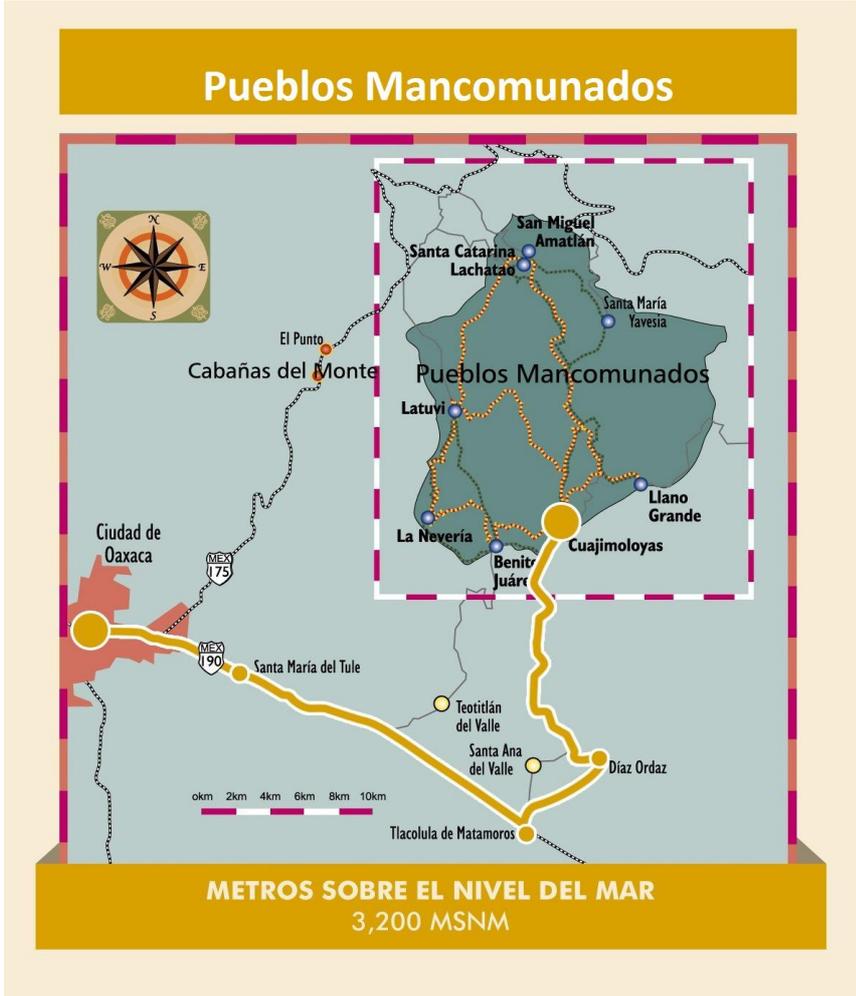
Angelina Martínez Pérez
Managing Director of Pueblos Mancomunados Tourism Agency
Expediciones Sierra Norte
Oaxaca
Mexico

Award Rationale

by

Klaus Betz

GENERAL MAP



1. INTRODUCTION

The application for the TO DO! 2016 was submitted by the community of villages PUEBLOS MANCOMUNADOS from the state of Oaxaca in Mexico and was nominated by the TO DO! jury.

The appraiser Klaus Betz travelled around Oaxaca (pronounced wəˈhɑ:kə) from 23rd November to 6th December 2015 on behalf of the Institute for Tourism and Development (Studienkreis für Tourismus und Entwicklung e. V.) in order to check on location the information provided by PUEBLOS MANCOMUNADOS.¹ The research mainly focussed on the community-owned eco-tourism programme which has been in existence since 1998. Eco-tourism is only *one* out of three successful areas among all the economic activities by *Mancomunados* (see 3.2).

On the basis of his insights and findings, the author recommends awarding PUEBLOS MANCOMUNADOS with the TO DO! 2016.

2. BACKGROUND AND SETTING

In the country information provided by Germany's Federal Foreign Office,² Mexico is described as an advanced emerging economy. However, it is a fact that Mexico with a population of about 120 million ranks no. 14 among the largest economies of the world. As an export nation, Mexico is no. 15 in the global ranking, and no. 10 among the oil exporting nations, and the seventh largest automobile producer.

The national language is Spanish, but there are 68 recognised indigenous languages and a total of 62 different ethnic groups. One of them are the Zapotecs, an indigenous ethnic group living mainly in the state of Oaxaca. PUEBLOS MANCOMUNADOS stands for an intercommunity cooperation initiative of eight Zapotec villages in the Sierra Norte. The Sierra Norte is a region situated north east of Oaxaca, with mountains of up to 3,250 m of altitude and a rich forest cover. The villages of the cooperation initiative are more or less self-governed, in line with the "carga system" which has been passed on over centuries (see 3.1).

Mexico may have a liberal economy, but at the same time it is marked by major social disparities and tensions which break out time and again. There are still oligopolies and monopolies in key sectors such as energy, telecommunications or banking. However, the situation is set to change gradually, because the current government has managed to break these structures by introducing legal amendments.

In 2014, the Mexican gross domestic product (GDP) amounted to 1,291 billion US dollars (GDP in Germany at the same time: 3,874 billion US dollars). The per capita gross national income amounted to 10,980 US dollars in Mexico, and to 47,969 US dollars in Germany³. The gini index as a statistical measure of income distribution within a country is 52 (in Germany 27, in Namibia 70.7). The higher the gini value, the more uneven a country's income distribution.

In addition to the export earnings, remittances by Mexican emigrants of 28 billion US dollars

¹ Derived from *mancomunarse* – to unite, associate and/or *mancomunado* – jointly held.

² Sources of the following summary: Federal Foreign Office, country information Mexico, "LIPortal Wirtschaft & Entwicklung" –country information portal of giz, "SympathieMagazin Mexiko verstehen", Swiss State Secretariat for Economic Affairs SECO, <http://de.statista.com>.

³ Using an average euro – US dollar exchange rate for 2014 of 1.33.

and the income from international tourism have played an important role. According to the UN World Tourism Organization (UNWTO), they amounted to almost 14 billion US dollars in 2013.

3. PUEBLOS MANCOMUNADOS

3.1 The “cargo system“ of self-government in local and economic policy matters in combination with “el tequio“

In order to be able to understand and put into context all the procedures regarding the lives, economic and communal politics within the Zapotec village cooperation initiative of the PUEBLOS MANCOMUNADOS which are described in the following, there is a need to know about the “cargo system“ which is practised here⁴. This system is based on the “usos y costumbres“ (practices and customs) which have been passed on for about 400 years and which are officially enshrined in the respective national laws⁵. Thanks to this system, a lot of self-determined and participatory development takes place within the communities (see organisational chart on page 6).

Political parties are not represented/allowed in the *cargo system* which addresses local concerns. The Ecumenical Office for Peace and Justice in Munich has described the “practices and customs“ as an alternative voting system. The *customs* do not just govern the voting process in a community; they rather represent a comprehensive system of norms, shaped by collective ideas, which govern the entire community life. Volunteer positions in the local administration and community services (cargo system) are necessary preconditions for people to qualify as candidates for community leadership. The central institution for all “practices and customs“ is the community assembly (asamblea de comuneros).

In the PUEBLOS MANCOMUNADOS this means that all healthy community members between the ages of 16 and 60 who are able to work must/should, if possible, once in three years serve the community as unpaid volunteers for a period of one year respectively - in line with their qualifications, strengths, aptitudes displayed so far, and irrespective of gender. For the volunteers, financially this is a difficult year indeed. The loss of income due to this service can only be made up for by previous savings, by the partner or the extended family.

Unpaid services that benefit the community are the most demanding form of *el tequio*⁶ – the key term for a reciprocal society based on mutuality. In a personal context, it also refers to the non-monetary exchange of goods and services, if necessary with maize as payment in kind which is measured using the “almud“ (equivalent to four kilogrammes).

Against this background it may be understood why a young man or women of 16 years of age usually begins his/her service for the community as a “topil“ (unarmed village police and delivery boy/girl). If he/she does well in this position, he/she will then be promoted after a few

⁴The English term “cargo system“ refers to a “collection of secular and religious positions held by men or households in rural indigenous communities throughout central and southern Mexico.“ Another definition describes it as a “ladder system of mayordomoia“, or in Spanish: sistema de cargos – a rotational system according to which all the citizens of a village are to be elected for a certain time frame to serve in official positions without being paid.

⁵ Cultural scientist Dr. Anne Hufschmidt writes in a *Lateinamerika-Dossier* published by Bundeszentrale für Politische Bildung on 9/1/2008 that in the state of Oaxaca, 418 out of 570 communities function according to the ‘practices and customs‘ of traditional village communities, which are officially recognized by national law. In fact, Mexico ratified *Convention No. 169* of the International Labour Organization (ILO) in as early as 1991. The Convention demands that the political and legal traditions of the indigenous communities be taken into consideration in the legislative process.

⁶*El tequio* (del náhuatl tequitl, trabajo o tributo) es una forma organizada de trabajo en beneficio colectivo. (An organised form of work that benefits the community collectively).

years, for example as treasurer of the tourism cooperative or as coordinator in charge. In the third or fourth volunteer term, he/she might be appointed *alcalde* (magistrate and mayor). Other unpaid jobs serving society may be: bus driver, road construction worker, lumberman, local administrator, water supplier, chef in the village-owned restaurant, receptionist, or room service staff in the village-owned hotel and/or in the *cabañas*.

Exceptions are certain services in tourism: local guides get daily fees for their guided walks, horse rides, or mountain bike tours. The owners of small enterprises (trout farmers, jam producers, pulque producers, restaurant owners, food stores) act on their own accounts.

However, most of the inhabitants of the *Mancomunados* live as farmers (maize, potatoes, fruits, vegetables, cows, sheep, chicken, flowers). What is important to know: The farmers are registered and thus legally use the land they cultivate (with land use being regulated by the community assemblies), but ownership remains with the village communities. Nobody can individually buy land, water rights, or forests. Or as a local guide said with a smile: "It's all mine, but also belongs to everyone else".

Regular paid jobs – especially for the young villagers – are usually available only in the three enterprises that are jointly owned by the *Mancomunados*. As market access and distribution are easier there, these enterprises are located outside Sierra Norte, in the regional capital of Oaxaca. For example:

Expediciones Sierra Norte (tourism agency jointly owned by all *Pueblos Mancomunados*, four employees – all of them women, with a turnover of about four million pesos/220,000 €).

Actividades Forestal (joint forestry, sawmill and/or timber processing, production of furniture, furniture shops, 117 employees [among them 35 women], with a turnover of around 40 million pesos/2.166 million €), and the jointly owned

Envasadora y Empacadora Indapura (sale of natural mineral water/bottling, 54 employees [among them 27 women], with a turnover of about 11 million pesos/596,000 €).⁷

Those who have gained prestige by serving the village community/communities may be delegated by the village assembly (the sovereign) to the "asamblea de caracterizados" (assembly of outstanding and respected personalities). This is where the "parliamentarian power" lies (for the community enterprises it is the board of directors). In between the bi-annual community assemblies, the *caracterizados* have full decision making powers.

The three *comisarios* – the presidents in charge for a period of three years – are usually from this circle. They officially represent the PUEBLOS MANCOMUNADOS as legal representatives (as a form of government). At the same time, they are responsible for the management of the assets and property of all *Mancomunados* villages (*comisariado de bienes comunales*).

Furthermore, the structure of all bodies and institutions within the PUEBLOS MANCOMUNADOS has been set up in line with the principle of "checks and balances" (see organisational chart). The cooperation between the respective villages is stipulated in a contract in such a way that the cooperation of the villages with about 2,500 inhabitants may be dissolved only if the decision is unanimous. The profits from joint activities are shared among the villages in proportion to their numbers of inhabitants.

⁷ **Attention:** Three of the four Managing Directors are women.

3.2 History, tourism activities and programmes

The eco-social tourism history of PUEBLOS MANCOMUNADOS began as early as 1998. At that time, established tourism managers still called the pioneers “ecoloco” (eco-crazy).

Today, the situation has changed completely. Nationwide, the PUEBLOS MANCOMUNADOS are considered a model – both with regard to their eco-tourism programmes and with regard to their local self-government. Various student groups and delegations from other local self-governments in Mexico come to attend seminars and training programmes, in addition to the annually growing numbers of international tourists and Mexicans from the big cities with high levels of air pollution who come in search of nature and fresh air.

After all, the Sierra Norte is a mountain region blessed with natural resources especially in the area where the PUEBLOS MANCOMUNADOS are located, and it is administered in a sensible manner. It has a size of about 29,000 hectares⁸ (which is almost the size of Munich). Almost two thirds of the Sierra Norte – at an altitude of 2,000 to 3,250 m – consist of deciduous and pine forests with a high biodiversity and a large number of species. The forests are managed sustainably (FSC label). Five percent of the area is populated, about 13 percent cultivated. The rest is scrubland.

To a European, the mountain region may resemble regions like Bregenzerwald or Allgäu – the difference being that at an altitude of 3,250 m the mountains here still have a forest cover with mighty agaves, lilac, and bromeliads and orchids growing in the trees. Buzzards are as common as zopilotes (turkey vultures), spotted woodpeckers or hummingbirds.

The starting point for the development of eco-tourism programmes was the need of the Mancomunados villages to create additional jobs and diversify their sources of income. In the 1990s, the tourism ministry of the state of Oaxaca had initiated a programme to build “lodges in rural areas”. One of the first lodges was built in the Mancomunados village *Benito Juárez* which is the easiest to reach from Oaxaca City. The village was named after the famous Mexican reformer and President *Benito Juárez* (1806-1872).

This was the kick-off for the neighbouring villages in the surroundings that have – with the respective financial support, but in line with *el tequio* also through their own joint efforts – slowly built a chain of lodges, most of them in excellent scenic locations.⁹ A total of six out of eight Mancomunados villages have become active. At the same time, ecotourism centres were also set up in the villages – as reception centres, tourist information and organisational offices.

Furthermore, a network of 100 kilometres of trekking routes was established (partly on pre-hispanic trails, partly on traditional communication paths between the villages). Today, these routes may be discovered during guided day trips or longer hikes over several days, accompanied by knowledgeable, reliable guides¹⁰ (luggage transport by donkey upon request). Tours are also possible on horseback or using mountain bikes.

A very positive aspect is that each of the six villages has a different focus, so that today they all have their own diversified profiles:

Amatlán, for example (400 inhabitants, 2,000 m altitude, six cabañas), relies on the history

⁸ According to the old maps. According to new GPS coordinate it is 24,800 hectares.

⁹ Solid, clean and quite comfortable lodges built of stone (with two to six beds) which are simply called “cabañas” (cottages), but are not actually cottages.

¹⁰ Basic Spanish is necessary, English is not commonly spoken.

of the settlement of Sierra Norte by the Zapotecs and information on Zapotec culture. The village has a small museum showing copies of historical maps. In line with the theme, the village also offers a traditional steam bath “temazcal” including massage. And not to forget, the restaurants – here as in all the other villages – mainly offer local and/or regional dishes (see 4.5).

Apart from hiking, the neighbouring village of **Latuvi** (675 inhabitants, 2,600 m altitude, eight cabañas, and three restaurants) focuses on encounters with the people who each occupy a market niche. They range from trout farmers to producers of pulque and tebache (from so-called “honey water” of agaves) to a women’s group “Xigala” that relies on organic marmalade and jam from locally produced apples, peaches, lime, guava, and passion fruit.

In **La Neveria** (85 inhabitants, 2,720 m altitude, 11 cabañas), guests can stay at a holiday resort, but also with a total of 14 families in authentic home stays where they can share the families’ daily lives: in the fields, for example, or harvesting great yellow-cress.

Benito Juárez, for its part (390 inhabitants, 2,800 m altitude, 11 cabañas), is a preferred destination thanks to its good connections to nearby Oaxaca. It is also the best known village, as it was the first one to offer eco-tourism, and has been running one of the best village-owned restaurants. *Benito Juárez* receives a lot of seminar guests and student groups, 110 visitors per month on average. Even though it offers interesting excursions – to a local eco-farmer, for example, *Benito Juárez* seems to be showing a trend towards nature-based action & fun. The village believes in scoring points with a rope bridge over a canyon that looks dangerous, while investing far less in the accommodation facilities which are gradually getting older.

The situation is very different in the largest of the Mancomunados villages, **Cuajimoloyas**, with a population of 1,000 inhabitants. It is a place situated at an altitude of 3,100 m and has 17 very nicely located cabañas, one small hostel, and several restaurants. It calls itself „La capital del hongos silvestre“ (capital of forest mushrooms). Consequently, the village celebrates a mushroom festival every year in July. Apart from one-day hikes in the forest, it offers guided mushroom tours (organised by the very active women’s group “Sierra Viva”). However, *Cuajimoloyas* does not owe its about 7,000 visitors per year to nature-related themes alone. One of its main attractions is a zip-line of a length of one kilometre (Spanish: “tirolesa”). Hanging on a steel rope, well secured, at a height of 50 to 80 metres, you swiftly go down from the summit of the *Yaa-Cuetzi* (the local mountain) at 3,250 m, sweeping across the whole village.

Llano Grande at an altitude of 3,200 m is far more quiet (90 inhabitants, 15 cabañas that may almost be described as high-class, some of them in very beautiful locations in the forest, with seminar facilities). It receives guests with the self-confident slogan “Welcome to the lungs of the world“ (*Bienvenidos a los pulmones del mundo*). Among insiders, the small village is an ideal starting point for guided mountain bike tours. Hiking trails lead deeply into the forest and early birds may experience spectacular sun rises at one of the most beautiful viewpoints in the Sierra Norte.

In 2002, only 2,500 tourists visited the PUEBLOS MANCOMUNADOS throughout the year. In 2014 there were already as many as 17,000 visitors. From the beginning, the tourism agency **Expediciones Sierra Norte** established in Oaxaca by the village cooperation initiative has been a key success factor. Over the years, a hardly known no-name-office has turned into a professional incoming operator.

The four women working at the office are all from different Mancomunados villages. They cater to both backpackers and professional tour operators.

Today, *Expediciones Sierra Norte* is no longer concerned with increasing visitor numbers, but rather with making interested tourists stay longer in the PUEBLOS MANCOMUNADOS.

While tourists may continue to book short trips, the focus is now also on tour packages for one week or more. A seven day' hiking package with a guide including food and accommodation for six nights, organised encounters, insurance, transport to and from Oaxaca is possible for two persons from 9,225 pesos (512 euros) per person. A guided four-day-trip for mountain bikers including equipment – with services as above – will cost about 10,000 pesos (about 550 euros). For a group of six participants or more, discounts are offered accordingly.

In the meantime, 53 eco-tourism jobs have been created in this way in all PUEBLOS MANCOMUNADOS. Some of them are not paid – under the cargo system described above, others are paid. In terms of motivation and commitment, this makes hardly any difference.

4. EVALUATION AGAINST THE TO DO! CONTEST CRITERIA

Comparing the activities of PUEBLOS MANCOMUNADOS with the TO DO! contest criteria leads to the following assessment:

4.1. Taking into account the different interests and needs of the local people through participation

The legal provisions make it almost impossible for investors from outside to engage in the area of the PUEBLOS MANCOMUNADOS and exercise any influence. Furthermore, individual villagers cannot call the communal property their own. In addition, all the decisions for the future are taken under the angle of “practices and customs“ and are discussed and passed by the members of the community assembly (asamblea de comuneros) who have voting rights. Under these conditions, the degree of participation is extraordinarily high. It has in fact been institutionalised.

Irrespective of the fact that the legislative and executive bodies (asamblea de caracterizados and comisariado de bienes comunales) have significant powers, they eventually – mostly twice a year and surrounded by control mechanisms – have to report to the sovereign (the asamblea de comuneros) on political as well as administrative and/or financial matters. This equally applies to all the areas in which the PUEBLOS MANCOMUNADOS are doing business, and to each and every leadership position - whether as unpaid tourism coordinator who has been appointed for one year as part of his/her volunteer year, or as paid managing director. In brief: Nothing in the PUEBLOS MANCOMUNADOS would work without or against the local population.

4.2. Enhancing the awareness of the local people with regard to the chances and risks of tourism development for their economic, social and cultural lives

In individual conversations the author was told several times that in as late as the 1990s scepticism dominated with regard to whether this area which is hardly known on the tourist map should be opened to strangers. However, due to a lack of job perspectives, young people were under subliminal pressure to move away or to even emigrate to the US for good.

Due to the fact that the villagers themselves were able to control the development of tourism, the pace of change was cautious and manageable. The villages did not build ten lodges all at once. Rather, under community leadership and after consultations

within the community assembly, one or two buildings were set up every two or three years. At the same time, they had consultations about codes of ethics for the villagers as well as for the visitors. Information boards in the local eco-tourism centres provide evidence.¹¹

Meanwhile, the pendulum rather points towards opportunities, because the local population has long understood that there are visitors interested in encounters who respect Zapotec culture and local *costumbres*, and because the tourism income (whether in individual or community coffers) has become noticeable.

4.3. Participation of broad local population strata in the positive economic, social and cultural effects of tourism

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4.4. Guarantee of the attractiveness of jobs in tourism or of income opportunities for the local people through improved working conditions in terms of remuneration, social security, working hours, further education, and training

In view of the “cargo system” described in 3.1 and the “el tequio” principle that is linked to it, these two criteria can only be applied in limited ways. In a situation in which almost all tourism enterprises are owned by the local community and the people involved are often volunteering for a year and understand their work as serving the community, participation and benefits do not accrue to the individual, but at best to the community. We might also say that in this case, the income from eco-tourism practically diffuses into all areas of community life.

And even if a driver employed by the community drives a bus owned by the community, while on other days he drives a caterpillar owned by the community for road maintenance, this bus driver “serves” both the promotion of tourism and the local population driving their own cars. In our society which is based on a strict division of labour, it may just be difficult to understand that in the Mancomunados villages the terms “community” or “local administration” are nothing external, but are considered as “we” and “our”. That’s why when someone is ill it is self-understood that the community will play the role of a (local) health insurance.

Irrespective of this system, there are a few restaurants and bakeries under private ownership. Since most of them are small family enterprises – and therefore self-employed – these criteria can hardly be applied in their case either.

4.5. Strengthening local culture and cultural identity of local people in the tourism destinations and avoiding/minimising any social and cultural damage caused by tourism in tourist destinations

There is no doubt that the local culture is being strengthened here. First of all, without the knowledge of the elderly, e.g. with regard to the trails through the forests, it would probably have been difficult to establish the network of trekking trails, to produce maps that give an overview of the area, and to train guides.

Furthermore, young people have increasingly gained interest in medicinal plants, for example. They see that tourists on their holiday go to visit and appreciate the healers

¹¹ E.g.: When walking through the village, please learn about internal rules – respect local culture. Take photos only, do not take any plants or animals with you. Help conserve water. In the eco-tourism centres you will find biodegradable soap. Please use local services (guides, restaurants, lodges) and support the local economy.

who are still practising in some of the villages. The same applies to the cleansing ceremonies in connection with the traditional steam bath “temazcal”.

Finally, the tasty regional cuisine (using locally available quality products) naturally features in the menus of the restaurants in the Mancomunados villages. Here a few examples:

Entomadas (tortillas in tomato sauce, cheese, onions, with eggs on top),
Coloralito de papa (potatoes coloured with spices and sauce, with vegetables),
Quesadillo (pancakes made from maize, stuffed with cheese and chilli),
Salsa de huelvo (scrambled eggs in tomato sauce with avocado and quesillo de Oaxaca),
Tortita de berro (omelette with great yellow-cress),
Chintesle (pepper powder made into a paste),
Pollo asado (fried chicken with rice, beans, mushrooms and avocado),
Truchas fritas (fried trout, rice, beans),
Hongos empanada (fried mushrooms dipped in butter),
Tlayuda (pizza from the Oaxaca region)

Atole de trigo (drink made from ground wheat seeds with cinnamon)
Té de poleo (peppermint tea)
Pulque, refined as tebache (tastes like beer with apple cider)
Jugo de tamarindo (tamarind juice)

4.6. Environmental compatibility

In all the lodges of the PUEBLOS MANCOMUNADOS, the author noted the consistent use of energy saving lamps. The water geysers are not on all the time, so that (in order to save energy) guests cannot take a shower at any time they wish. As during the winter half of the year it may get cold at night and the holiday homes do not have heating systems, there is a fire burning in the fireplace in the evenings. Firewood is used sparingly, though, even if it is taken only from trees that have been affected by bark beetles.

In front of and near the lodges there are waste bins to segregate organic and non-organic materials. No waste bins have been installed along the hiking paths on the forest trails and at view points. Tourists are to take their waste back with them. The guides also pay attention that they do so.

The agricultural products are organic, because most of the agricultural units are small subsistence farmers who are not engaged in intensive agriculture. Pesticide-free peaches and apples are as normal as wild raspberry hedges or water melons.

The waste water from the lodges is collected in three-chamber septic tanks. At the end, so-called grey water remains which may be used for the irrigation of bushes and flowers. Llano Grande used to provide dry toilets. The inhabitants have accepted this toilet that does not need to be flushed and are still using it. The guests don't.

4.7. Participation of women and men in planning and implementation processes –improvement of gender relations

In the Mancomunados villages, one can still observe the classic distribution of roles. Women at the stove, men working in the fields. But as both women and men are part of the cargo system (and therefore both serve the community), both also have a voice in the community assembly. And since qualifications and inclinations as well as

achievements of the past matter, it does not come as a surprise that as many as three women have been appointed managing directors of the Mancomunados enterprises in Oaxaca.

Angelina Martínez Perez is from Cuajimoloyas and manages the tourism agency “Expediciones Sierra Norte” (a team of four women). Isabel López López is from Llano Grande and manages the Mancomunados enterprise Indapura (mineral water, bottling of water). She had once started as a bottle cleaner. Today she is the boss of 54 employees. Laura Venegas manages the joint Mancomunados saw mill and a furniture manufacturer with 88 employees. Remuneration follows the principle “equal pay for equal work”, as Laura Venegas assures.

In the tourist areas within the villages, the situation is also changing gradually. Cuajimoloyas now also has female nature guides – previously an entirely male domain.

4.8. Measures to ensure economic and institutional sustainability of the project

The eco-tourism programme of the PUEBLOS MANCOMUNADOS is placed in an economically favourable and politically healthy context. The communities do not only depend on tourism. The additional income from agriculture, forestry and water management makes the small communities rather resilient to crises.

The organisational structures of the village cooperation initiative are also targeted at ensuring institutional sustainability. There is no single predominant individual, but a collective with several control and reporting mechanisms, which is newly elected once in three years.

In that respect, no other measures need to be introduced. The project may rather serve as a model for other projects.

5. CONCLUSION

The author was especially impressed by the fact that traditional values preserving the communities' identities are kept while applying modern, transparent development and administrative structures. In connection with a social approach that permeates the entire community on the one hand and the expected service for the community on the other hand, the cargo system that has been practiced here for centuries seems to go another step beyond the well-known model of cooperative societies. Another point that needs to be stressed is the vision of not just relying on the income from tourism, but of achieving well-being within the PUEBLOS MANCOMUNADOS through economic diversification – which may also be called a success (e.g. in forestry and water management).

In view of the considerable social disparities in Mexico, the PUEBLOS MANCOMUNADOS might show a viable path – beyond the TO DO! award 2016 recommended by the author.

Contact Award Winner:

Angela Martínez Pérez
Expediciones Sierra Norte
M. Bravo No. 210 Int. A Plaza San Cristobal
Col. Centro, OAXACA
MÉXICO

phone +52 01(951) 514 82 71
e-mail: sierranorteoaxaca@gmail.com
web: www.sierranorte.org

Organizer of the TO DO! 2016 – Contest for Socially Responsible Tourism:

STUDIENKREIS FÜR TOURISMUS  UND ENTWICKLUNG e.V.

Studienkreis für Tourismus und Entwicklung e.V.
Bahnhofstraße 8, 82229 Seefeld
phone +49-(0)8152-999010, Fax: +49-(0)8152-9990166
E-Mail: info@studienkreis.org
www.studienkreis.org
www.to-do-contest.org

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